Aligning CX technology and CX goals.

Introducing Connect's USER approach

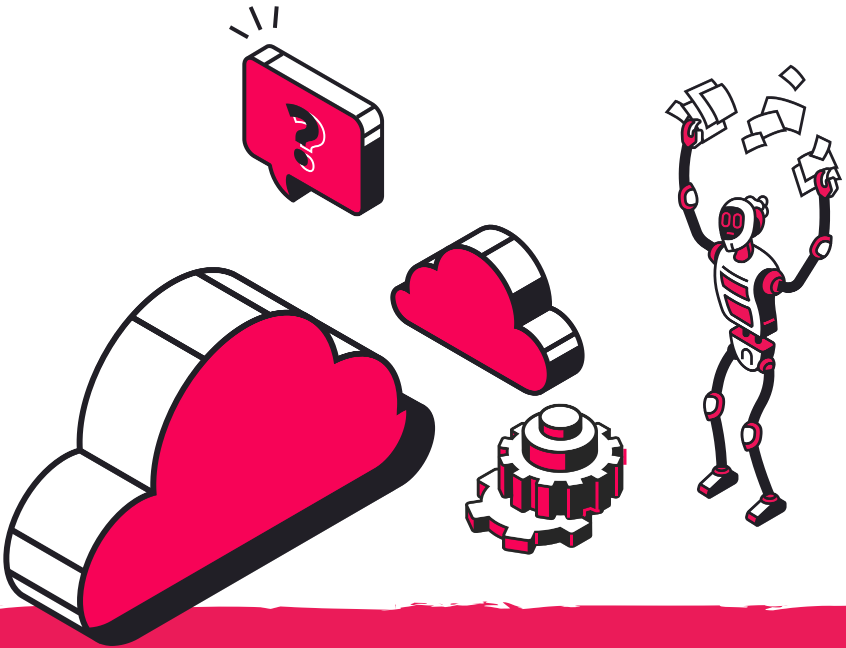
Over the last few years, cloud contact centres have become the default option for vendors and customers alike. So whether your organisation has implemented a new contact centre over recent years, or upgraded an existing one, the project almost certainly involved a full or partial move to the cloud.

The arguments in favour of the cloud are varied. For some, the priority is to benefit from the flexibility of the contact centre as a service (CCaaS) model: the opportunity to add new features as they are made available, and to react dynamically to evolving market conditions. Others value the shift from long capital projects to a more predictable operating cost.

Unfulfilled promise?

Yet while the promise of the cloud was clear, there are signs of growing frustration with cloud solutions. More and more businesses report that the CCaaS solutions they have deployed offer less functionality than they imagined and that they are gaining neither the cost benefits nor the expected customer experience (CX) improvement.

Furthermore, while the CCaaS vendors have been quick to highlight their solutions' AI credentials, many organisations have struggled to incorporate AI and automation into everyday contact centre tasks, despite growing demands from the boardroom to do so.



Crucially, it's not only businesses that are underwhelmed. Customer surveys paint a common picture of a perception that the CX is deteriorating rather than getting better: customers feel they're waiting longer and being pushed to less effective channels.

Behind the clouds

In recent months, these issues have motivated a growing number of organisations to contact Connect seeking a solution to their CCaaS dissatisfaction. While the precise diagnosis differs each time, we have repeatedly found that the real problem is not the technology itself; instead, the majority of cloud solutions implemented are not yet being used to their full potential and are not aligned with customer expectations.

Sometimes this is a consequence of a rapid deployment (especially during the pandemic) that the business has not yet had sufficient time and resources to address. But more often, it's because a decision was taken to deploy the cloud solution as a minimum viable product – perhaps even little more than a like-for-like replacement for the old on-premise platform – with a view to expanding it at a later date. However, post-implementation, momentum is lost. The intent to rethink customer contact, optimise channel strategy, embrace automation and streamline journeys is still there, but progress is stiflingly slow as businesses attend to their everyday operations.

Time for a new approach

With businesses needing their cloud contact centres to work harder for them, it's time to take a more strategic approach – re-evaluating customer contact and then moulding the cloud solution to better align with their CX goals. Over the following pages, we set out a route to creating that alignment.

Introducing the USER method.

With a series of organisations contacting us with similar concerns, the Connect team began to develop a consistent approach to helping businesses better align their cloud contact centre technology with the CX they want to deliver.

The approach is rooted in gaining insight into the real customer demand your organisation is facing, and then exploring how your existing solutions can be most effectively harnessed to meet that demand. So instead of a distant vision of a tech ideal, it's built on reality. What's more, it results in a business case for improvement that can have real traction at boardroom level, because it quantifies the opportunities. We call the methodology USER:

- **U**NDERSTAND: Why are different groups of customers (or personas) contacting you and how effectively are you handling these interactions?
- **S**COPE: What can the business gain by handling contact differently?
- **E**VALUATE: Is your current tech able to support this? What else do you need?
- **R**EDESIGN: How can you optimise customer journeys to benefit both customers and the business?Where can automation help?

The USER method is equally valuable and effective for organisations planning their first transition to the cloud, as it provides the optimal basis for the initial implementation.

By applying this approach, organisations are far more equipped to make effective decisions about technology procurement, service changes or upgrades, because they're doing so from a point of substantial knowledge.

But importantly, this isn't a once-off process that is only applicable to planning the transition to cloud or a major upgrade. Instead, the USER method can become the foundation of ongoing analysis and activity, so you can keep optimising the CX, in line with evolving business and CX goals.

It all starts with understanding.

The first step to improving the CX, and the everyday efficiency of your contact centre operations, is to fully understand three crucial things:

- **Why** are customers contacting you?
- **How** customers are contacting you – does it differ between types of interaction?
- **What** happens next – are those contacts managed in the most effective way for your business and the customers?

That may sound obvious, or even deceptively simple, so let's take a more in-depth view of what we mean when we say you need to fully understand these factors.

To get the right balance, focus on different personas or customer types that are relevant to the business. That way you can explore patterns across a broader spectrum, rather than just looking at individuals.

Gather the data

Firstly, it's essential that you gather data about all types of interactions. Even if you're being pressured to reduce call volumes as a cost-cutting measure, you need to look beyond just voice. Consider webchats, emails, social media and, importantly, complaints. Look at the classic measures: the absolute numbers, call duration and customer satisfaction.

Then it's time to delve deeper into the content of those interactions and the customer journeys. This is where advanced analytics comes in.

Categorise interactions

We typically seek to categorise interactions into relevant topics for your business. These will differ between business types: insurers for instance will have large proportions of renewals and claims, which won't apply to retail.

Examine the customer journeys

The analytics can then help you explore how consistently and effectively you're handling the interactions in each category. Are you identifying intent early, and routing customers to the most appropriate channel?

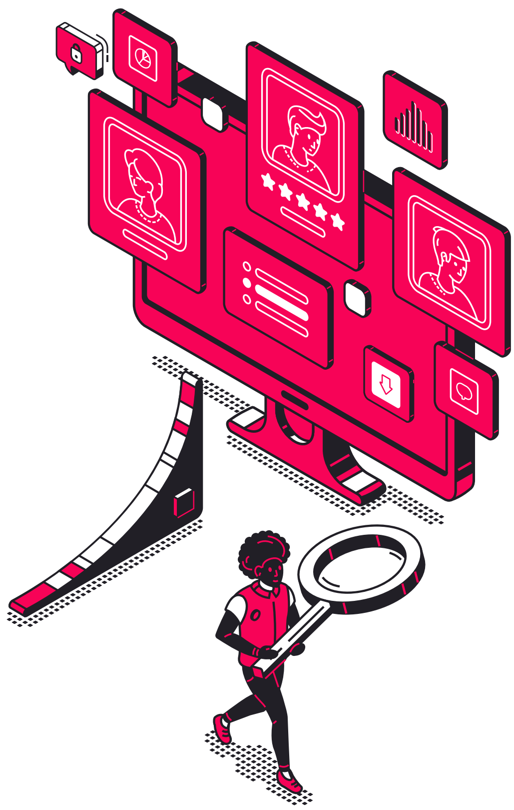
If there are self-service options for that type of interaction, are they producing the right outcomes, for you and your customers? This isn't just about how often customers switch out of self-service channels to assisted ones, but also comparing the sales figures, for example, of self-service versus agent-led interactions, in terms of value and success rate.

Beyond customer survey data, interaction analytics can also reveal customer sentiment during the conversations: are there common signs of frustration at certain tasks?

Finding the opportunities

This kind of in-depth analysis will enable you to build an overall picture of the journeys you're handling well (for example, high-volume, low-value transactions that are completed with no agent interaction and high customer satisfaction), and those which offer clear opportunities to improve. Typically, that means spotting where automation and self-service could be applied to streamline either part, or the entire process, freeing up agents' time and delivering the right outcome for customers faster and with less effort.

Don't forget to talk to your agents for their feedback too – they might have additional insights about what causes the most customer frustration or what slows them down.



At a major travel company, the on-premise contact centre was causing a growing number of headaches, with large volumes of calls being missed and limited self-service options. We helped them identify key opportunities to use IVR, online chat, SMS and enhance their online experience to reduce call volumes. The result is better self-service – with 45% of trip alterations now made online – and 300 fewer calls a day. And by both routes, customers are getting their issues solved faster.

Scoping the potential gains.

A detailed understanding of customer contact produces invaluable insights for those working in the contact centre or the wider CX space.

It can be the catalyst for almost instant changes, like refreshing the IVR menu to better reflect the reasons customers call. It may even help highlight issues to other teams in the business – such as recurring queries about certain products or common issues with deliveries or refunds. If your analysis shows that customers repeatedly get stuck at the same point in a self-service transaction, that can feed into the web team for their user experience.

Build the business case

For more substantial changes, where the data suggests that you need to invest in additional tools or process redesign, you need to translate the contact analysis into something credible and persuasive for those holding the purse strings.

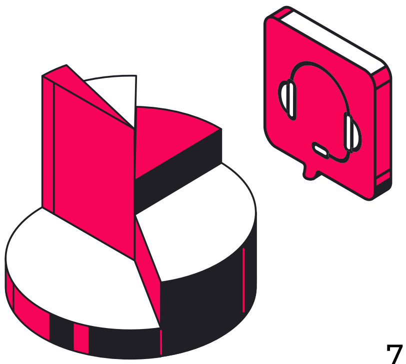
We call this step “scoping”, where we help our clients translate the analytics data into costed opportunities and demonstrate the returns that the business could gain.

At a simple level, that might mean showing how improving automated identification and verification (ID&V) could help divert a considerable percentage of calls to self-service. A more advanced business case could demonstrate the benefits of connecting CRM data with the contact centre at a specific point to personalise interactions and streamline calls.

Highlight the wider gains

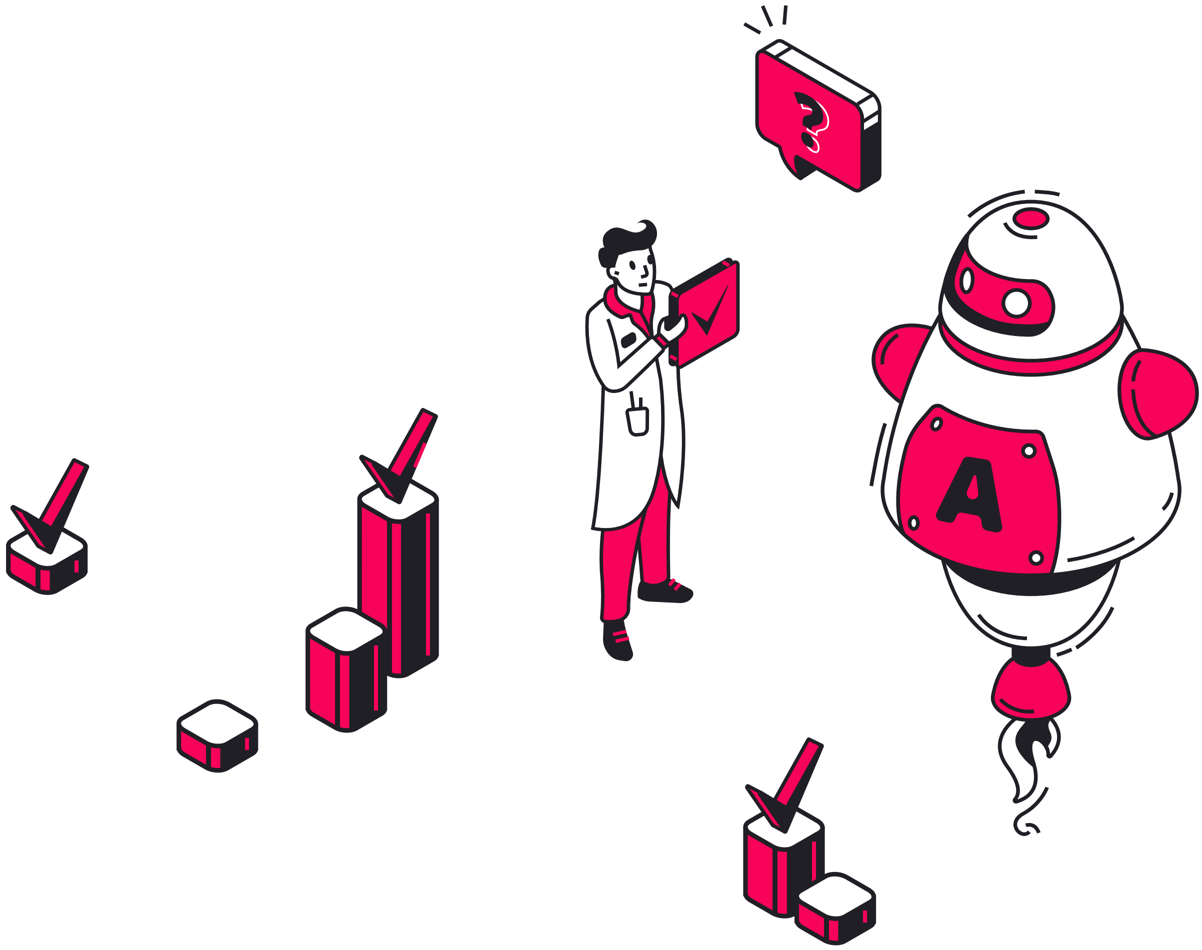
As well as the financial gains, in the scoping stage we also look at other positive outcomes: from a reduction in complaints to increased customer satisfaction, to quantifiable opportunities to that free up skilled advisors to spend their time managing higher-value interactions or looking after vulnerable customers.

It's also essential to include a realistic assessment of the costs and complexity involved in making these changes. In-house teams can guide this, but there is often value in working with an experienced external partner to provide a reality check.



Determine priorities

Presenting costed opportunities in this way enables businesses to agree on their priorities, from among the many opportunities for improvement that the "Understand" phase typically creates. With growing interest across many organisations for increased automation or the introduction of AI solutions, it's amazing how often you'll be pushing at an open door.



A major utility knew that one of the biggest drivers of traffic to the contact centre was when there was a service issue. We demonstrated the opportunity of introducing geographically-targeted IVR messages so that callers wanting to report, or get an update on an already recorded problem, could receive a standard message rather than waiting in a queue. It was a simple change that would deliver instant reassurance to customers experiencing a service issue, while freeing up advisors to focus on those with different concerns.

Evaluating your technical readiness.

With improvement priorities identified, it's time to look more closely at your existing CX technology and its suitability and readiness to support the outcomes the business wants to achieve.

This is more than just ticking off whether your current CCaaS platform offers the capabilities you want (in the majority of cases, we can tell you now that it will either already be available, or the vendor will have a partner solution). Instead, it involves going deeper to compare the different routes to delivering the necessary capabilities – from simply configuring a feature that you already have, to sourcing and integrating specialist point solutions.

Look beyond CCaaS

Effective evaluation also looks at the wider technology infrastructure, to identify potential barriers that may sit outside of the CCaaS sphere of influence: siloed data, and systems that are not integrated and will hamper automation efforts.

This process is particularly important because many businesses started to use contact centre cloud solutions in a rushed or ad-hoc manner. Some began with a small proof of concept or add-on, which has grown over time in a tactical rather than strategic manner. Others went for rapid deployment, such as during the pandemic, to enable flexible working at scale. With this in mind, there is often a case for a more structured assessment, like a well-architected review.

An independent perspective

Whatever your situation, it is valuable at this point to get an independent perspective: in particular, don't rely solely on your lead vendor's recommendations and portfolio. There are now multiple different ways to introduce the capabilities you need, which could include activating aspects of the CRM or customer service management (CSM) platform, for instance, rather than focusing on the conventional contact centre.

The right choices will depend not only on the technology you have, but also the skills of the team, plus the volume and types of customer contact you're dealing with.

Redesigning customer journeys.

You've identified what you want to change, secured buy-in and considered the technology infrastructure. The foundations are laid: now it's time to translate this into what it means for the customer experience. In this phase of our USER method, we work closely with our clients to examine specific customer journeys and redesign them in the optimal way, for the customer and the business.

Focus on intent

That begins with initial contact: which channel(s) are most appropriate for that type of interaction, and how can you encourage customers to choose the right channel? There's a more detailed behavioural science take on this, but from our perspective it's about presenting the most suitable channels as early as possible after defining intent. The first task, therefore, is to improve your ability to understand the customer's intent.

Evaluate journeys from the customer perspective. Then look at the individual journeys. You can't cover every eventuality, but for a common task – requesting a delivery update, renewing a contract, booking a service – the aim should be to ensure that journeys are as smooth and smart as possible. Take an outside-in perspective, looking at what the customer must do at each stage (even when that is simply "wait").

The aim should be to streamline the journey so it's more efficient, minimising duplication, such as customers having to re-identify, or repeat their requirements, without compromising the outcomes.

Adding automation

This often means working out where automation can be used to enhance the journey. Often, the answer lies in automating parts of the process, rather than the whole journey: for example, once the agent has confirmed all the requirements and entered data once, they shouldn't need to waste their time, and the customer's time, entering it again, or onto a separate system.

Focus on the hand-offs between systems, which can often be bottlenecks: can these be automated?

Dealing with exceptions

As well as defining your optimum journey, you need to plan for potential exceptions – where a customer chooses a different route. There may be opportunities to start the process with agent assistance, and then switch over to a self-service channel after some initial steps.

Making it happen.

With a clear strategy for CX optimisation in place, you're well placed to turn it into reality. You can identify what solutions and services you need to procure, and start that process, with a clear idea of how you want to use them: invaluable in differentiating between solutions that appear to offer broadly similar capabilities.

Where the focus is on making smarter use of technology you already have – which is the right approach for many organisations – it's still important not to underestimate the changes. Activating an existing feature sounds straightforward from the technology perspective, but your teams may need training on how to use it, and there could be integration challenges.

Take a realistic approach

Where you identify a bigger technical need, it's important to be realistic about how much you can deliver in-house. This is especially true for organisations that have already struggled to make changes over the last few years, because their IT teams are already stretched dealing with day-to-day challenges. Avoiding the costs of a specialist integrator may sound attractive, but if the result is that the time to value is delayed, you can end up derailing the whole programme and losing the confidence of the business.

Test from the customer perspective

Remember to test the new solutions and, more importantly, the journeys they enable, from the customer perspective as well as the internal one. It may work seamlessly if you press all the right buttons, but is it easy to follow? Are all instructions clear? Agents can be excellent testers, bringing their experience of the questions customers might ask.

A global energy solutions provider wanted to ensure a seamless connection between its Salesforce CRM platform and the cloud contact centre. We managed the deployment of Genesys Cloud across five service centres on four continents, ensuring total integration between the CRM solution and the contact centre. Agents now have a single user interface, including workforce management and call recording, meaning they can serve demanding global customers far more effectively. Analysis has found that the integrated user experience Connect put in place saves the business around 60 person-hours each day.

It doesn't stop at go-live.

Whether optimising your CX – and underlying CCaaS solutions – is a major programme of changes for you, or you want to focus on a few issues and monitor progress, it's essential that this optimisation process isn't the end of the journey.

Customer expectations keep evolving. Cloud solutions get new capabilities all the time. Different issues occur in your CX. To really capitalise on the potential of cloud solutions and their rapid release cycles, you need to keep optimising the solution – or you'll soon find yourself back in the situation you started from: with a CCaaS platform that doesn't meet the business needs.

Check your understanding

That may mean making the additional tweaks you've already identified as beneficial, but it's also worth revisiting the initial understanding and seeing whether there has been a change in the underlying data. Have customers moved to your preferred channels? Are you seeing improvements in contact handling effectiveness or customer sentiment?

Monitor technology change

Alongside this, there may be new or improved features available in the technology you use and license, which could be deployed to help you accelerate change.

Maintain the momentum with Connect360

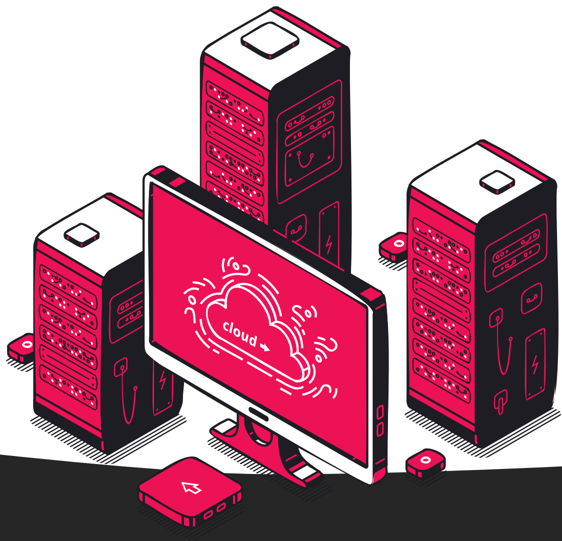
This kind of scenario is the logic behind Connect360 – a suite of integrated services designed to empower your organisation to excel in an ever-evolving market. Our experts can help you maintain the momentum and provide the insights and resources to capitalise on additional opportunities as they emerge. Optimisation services are just part of the flexible offer, that ensure your actual CX remains aligned with your CX vision.

Find out more about Connect360 at
https://www.weconnect.tech/how-we-do-it/connect360/
or request a call from one of our experts.

About Us.

Connect is a global systems integrator and digital transformation partner, dedicated to delivering impactful, technology-enabled customer experiences. Since 1990, we've been committed to excellence, innovation, and a client-first approach. Leveraging AI, data analytics, and automation, we design and implement personalised customer and employee experiences across all channels.

Our vendor-independent, service-led solutions simplify complex challenges and ensure a unified view of customers and operations. Guided by values of integrity, collaboration, and sustainability, we strive to make a positive impact for clients, colleagues, and communities, supporting businesses worldwide with global reach and local expertise. We make the complex simple.



Connect with us.

For any cloud contact centre enquiries, please contact us, whether you are optimising an existing solution or preparing for a transition to the cloud.

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