A Genesys eBook

Best Practices for a Seamless Omnichannel Customer Experience

SERVION

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Best Practices For a Seamless Omnichannel Customer Experience

It's natural to start designing an omnichannel customer experience (CX) with vision. For example, do you envision creating a 360-degree view of the customer to accurately predict and anticipate customer needs? Or, do you see creating an effortless experience that delivers a consistent experience as it transitions across multiple touchpoints and provides both added value and access to a live agent?

Once they have a vision, many companies jump right to functional requirements, skipping the important step of defining the actual customer experience. It is critical that you consider how to design a memorable experience in the customer lifecycle that maps to the needs of your particular customer segment and aligns to your brand values.

Here are six best practices to help you design and implement that experience.

# Best Practices in Creating Omnichannel Experiences

Design

- Identify Your Target Customer Segments & What Matters to Each of Them
- Baseline the Current Customer Journey for Each Segment
- Prioritize Your Focus & Map Out the "to be" Customer Journey

Implementation

- Use Context
- Identify the Customer Experience (CX) & Operational Metrics to Measure Success
- Adjust "The 3Rs" to Operationalize the Experience

Omnichannel CX Design Best Practice #1

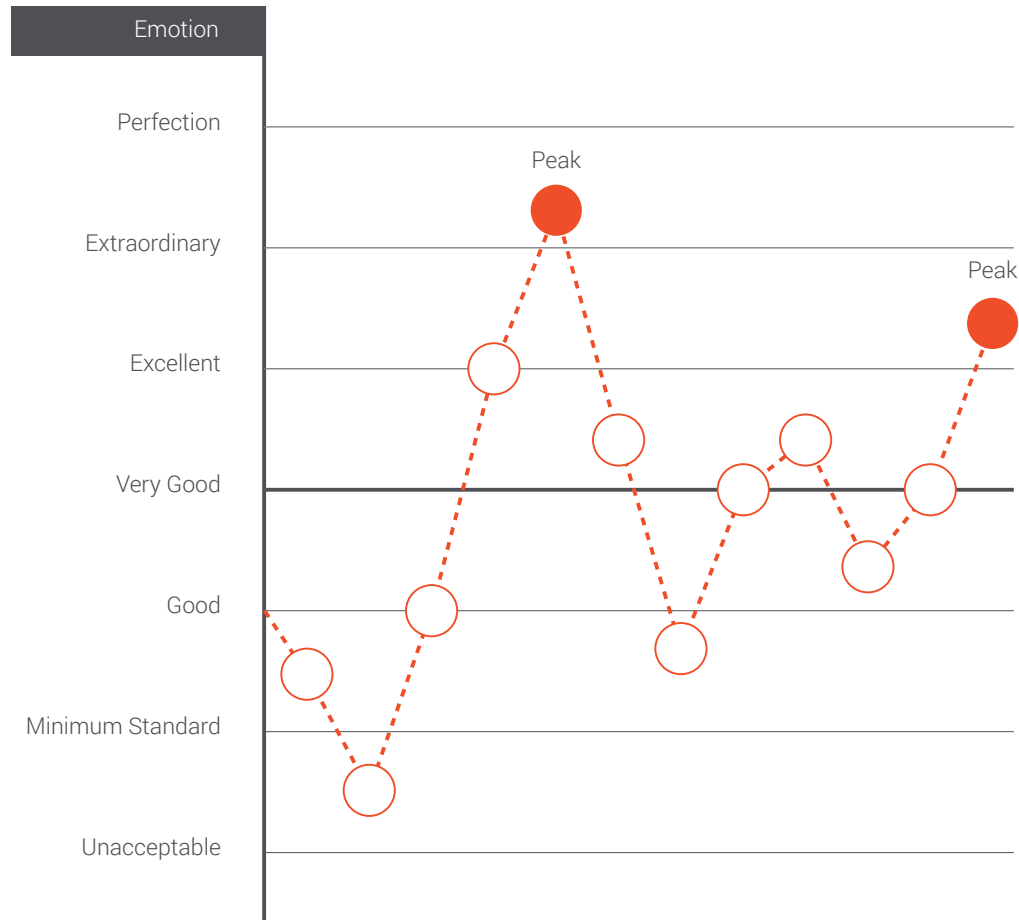Customer's Critical Needs

Main Customer
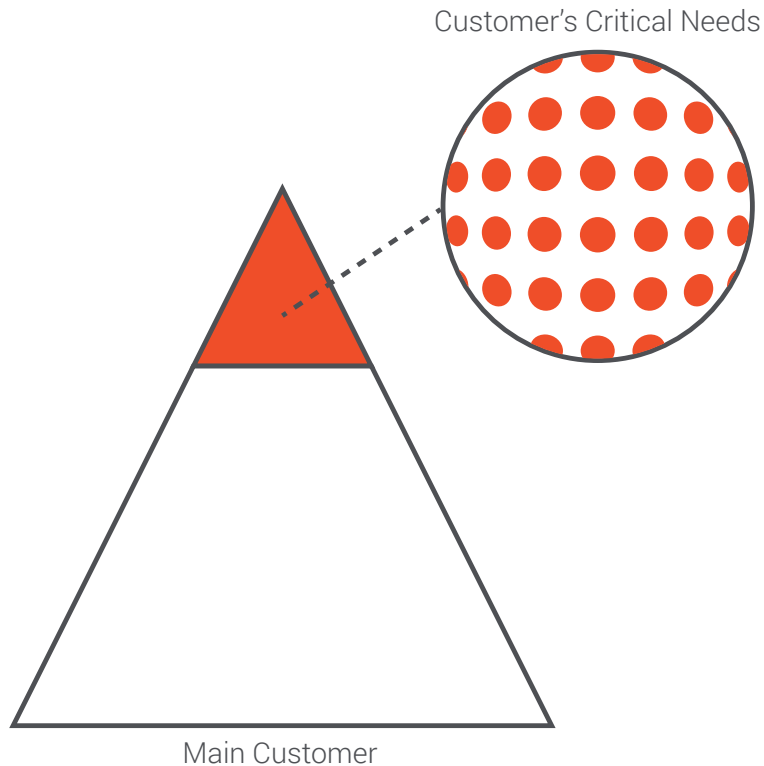
Identify Your Target Customer Segments and What Matters Most to Each of Them

Let's use an airline as an example to illustrate this best practice. First, to determine your target customer, you will need to consider who are your most profitable customers. For an airline, this might include factors such as reservation frequency, the cost to serve, and the established relationship.

Once you have identified the target segment, you must determine the customer's critical needs. For example, if you are a low cost airline, critical needs for the customer segment could include on-time arrivals and departures, low price, and customer service. Once you have determined what market needs you are going to address, you can align the critical customer needs with your brand value.

Omnichannel CX Design Best Practice #2

Emotion

Perfection

Peak

Extraordinary

Peak

Excellent

Very Good

Good

Minimum Standard

Unacceptable

Example: Making a Reservation

Baseline the Current Customer Journey for Each Segment

As you begin to baseline the current customer journey for each segment, you need to identify the high points and the low points along the way. As you do this, define the journey from the emotional perspective of the customer.

Key Points to Remember:

- You may have different journeys for each customer segment

- Include the emotional element and go through what it is like to be that customer

- Put yourself in the customer's place by, for example in our airline scenario, actually making a reservation

Baseline the Current Customer Journey for Each Segment
You can use tools, including Voice of the Customer surveys, call recordings, and customer focus groups, to more precisely validate the current customer experience.

Step back and look at the journey to see if anything is unacceptable or consistently causing customer churn or abandonment. Be sure to note what experience and emotion you leave the customer with at the end of the journey. Is it a high point or are you taking them through a lot of hoops that doesn't end at a great experience.

If the experience is to be more memorable, there will be wider gaps between when the experience is great and when it is not. To leave a lasting impression, end on a high note.
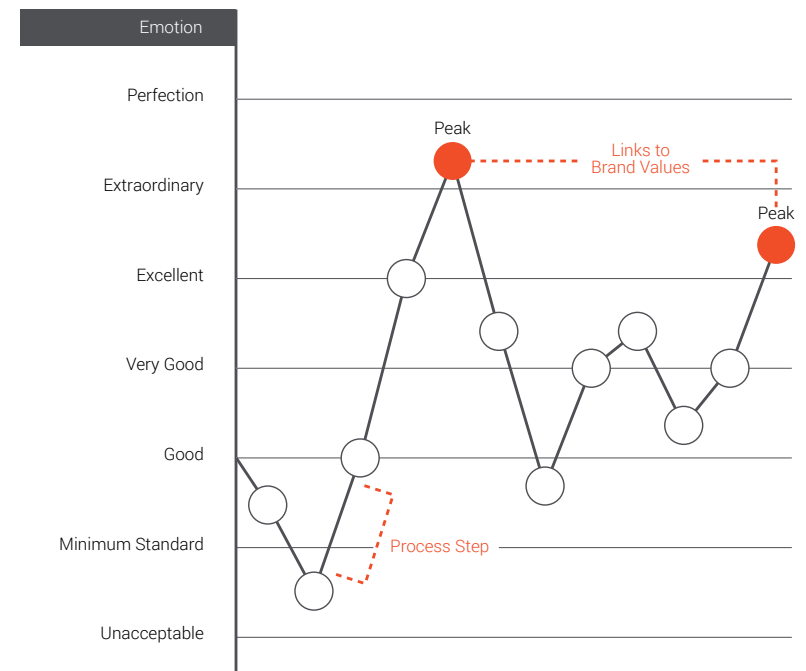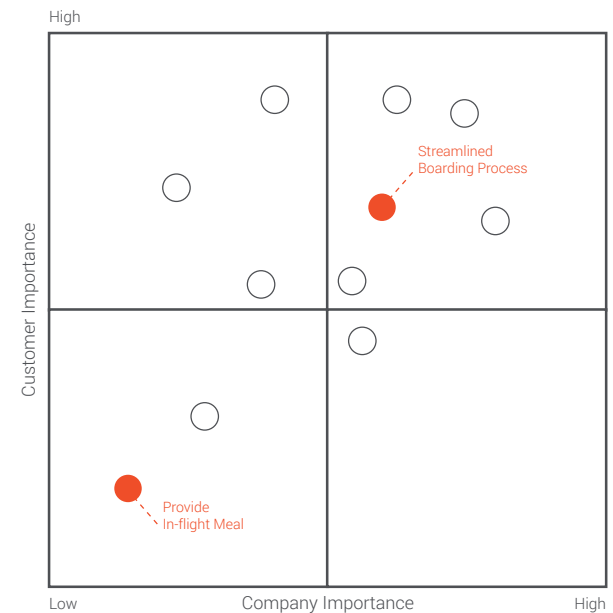
If you are looking to create a memorable experience, it is not effective unless remembered. If you don't remember the experience you won't be loyal to the brand associated with it.
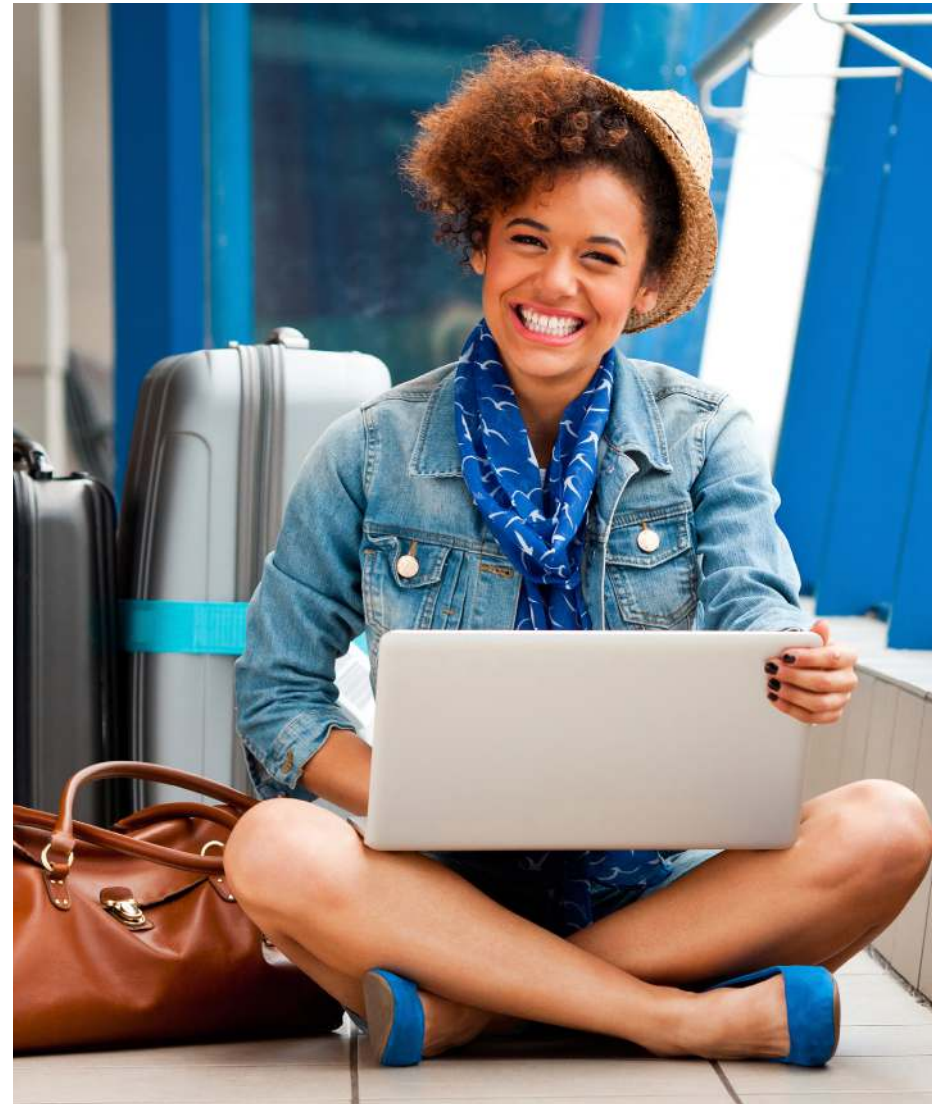
Omnichannel CX Design Best Practice #3

Prioritize Where to Focus and Map Out the Better Customer Journey Next, determine where you need to focus to provide the optimal experience. To do this, map out a four-quadrant matrix as shown above. You will identify each step in the journey and its importance to you and the customer. The upper right quadrant becomes the place where you need to focus most. Use this to map out the improved customer journey, remembering to keep emotion in mind and to align high points in the customer journey to the critical customer needs and your brand value. A couple of points to keep in mind:

1 Don't try to be all things to all people. There is limited time, resources and money. Map the "wow" points within the journey where it maps to your brand value and critical customer needs for that segment, and end on a high note.

2 Include a touchpoint dimension as you think about your new journey.

High

Customer Importance

Streamlined
Boarding Process

Provide
In-flight Meal

Low   Company Importance   High

Emotion

Perfection

Peak
Links to
Brand Values

Extraordinary

Peak

Excellent

Very Good

Good

Minimum Standard   Process Step

Unacceptable

How to Add a Touchpoint Dimension

As you map out your journeys, consider which communication options you are giving your target customers and how that aligns to what matters to them. This inventory will help you identify gaps or even options that might not matter and you should consider discontinuing.

For interactions within the journeys, identify relevant customer channels.

Next you will want to perform a gap analysis between the current state and future state of customer journey.

Performing a Gap Analysis

As you compare the current state customer journey to the future state customer journey:

1 If the current state journey step is below the future state journey step, then you need to assess if the current state is negatively impacting your brand promise and value. If the answer is yes, then you must consider that the business impact is the customer experience.

2 If the current state journey step is above the future stat journey step, and it does not negatively impact critical needs or brand value, then this may be an area where you are wasting resources. Potentially you can cut back as this is not critical to the customer.

3 If the current state journey step is at an unacceptable level, you are impacting the customer experience by keeping it at the same state.

Next, build an action plan to close the gaps across people, process and technology. As part of this don't forget to analyze your competition. See what it is like to be their customer. You need to understand where to differentiate yourself.

Perform gap analysis between current state and future state customer journeys.

Perform gap analysis between current state and future state customer journeys

In the example below, the Company B journey is a more desirable experience because it ends on a high note.
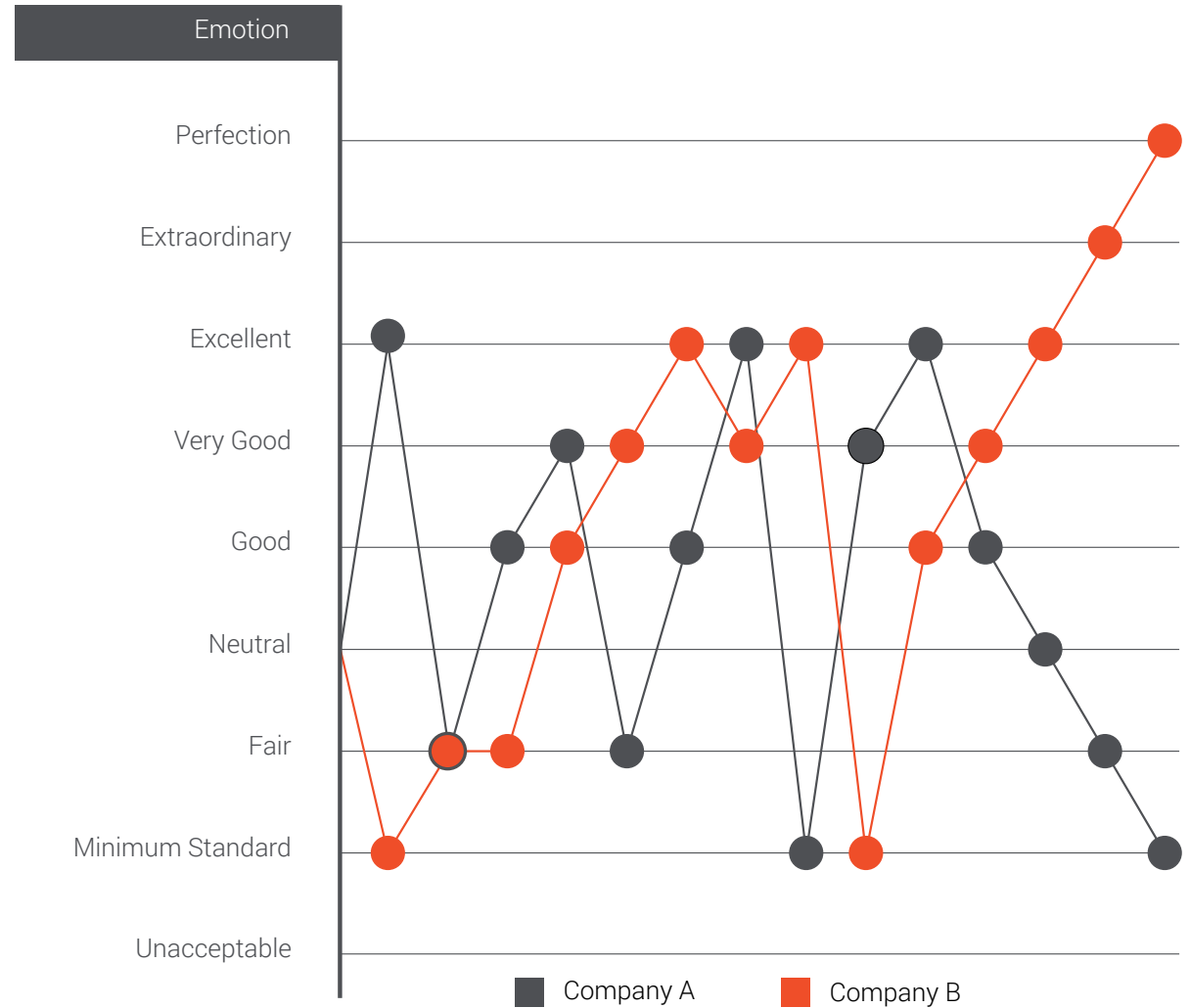
Perform gap analysis between current state and future state customer journeys

Implementing Your New Customer Journey

When you have defined your optimal customer journey, it's time to think about implementing it. There are three key best practices for implementation.

1 Use context

2 Identify the operational metrics you use to measure success

3 The 3 "Rs" to operationalize the experience
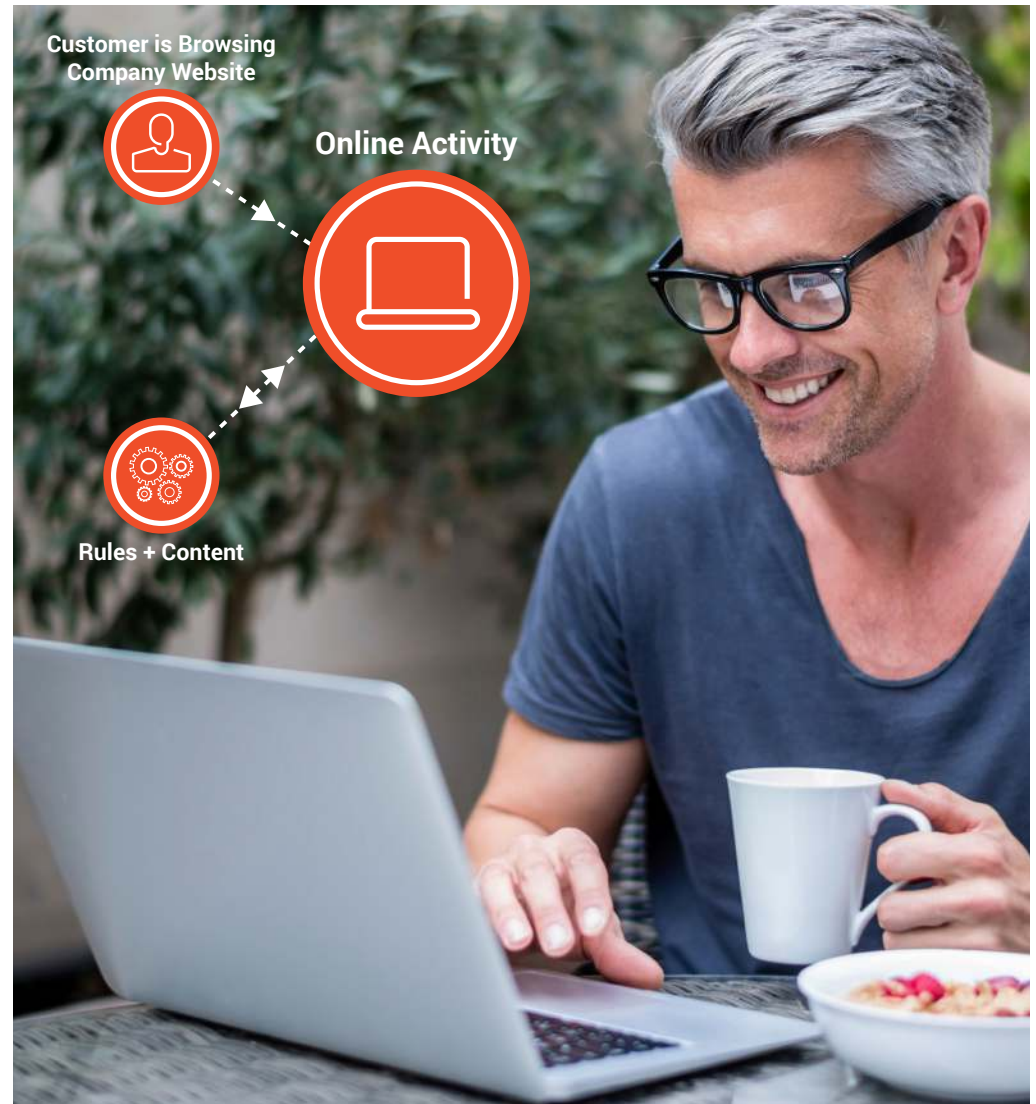
Omnichannel CX Implementation Best Practice #1

Use Context – Example 1: Personalize the Web Experience

Consider this example. Your customer is browsing on the company website. Based on the online activity you can leverage the context of where they are going and, if they have logged in and authenticated themselves, who they are, to dynamically change the website content to personalize the web experience.

This personalization may include:

- Offering suggested products in real time

- Enabling or disabling contact channels (e.g. priority service, contact number)

- Extending special offers or coupons

- Scheduling changes to web context based on rules

Customer is Browsing Company Website

Online Activity

Rules + Content

Use Context – Example 2: Cross-Channel Journey with Deflection

In this example, the customer has placed an order online for non-critical medication. After 12 hours the customer calls to check on their order. So they started on the Web and now have crossed to the voice channel. The IVR is aware of the online order , so it intercepts the call and provides a status update, rather than the normal static prompts. After listening to the status, the customer still may want some assisted service to talk with a live agent. Due to the low value nature of the call, because the order was for non-critical medication, the customer is offered a callback, making better use of the agent resources. The callback is then made at the most appropriate time with full context.

Use Context – Example 3 Extending Context Beyond the Contact Center

In the next example you can extend the use of context outside of the contact center to the enterprise, branch or retail store. The customer is shopping online for a new tablet and receives a promotional offer for a discount. They scan the QR code with their mobile device and see an expiration date that drives a sense of urgency. They take that offer to the retail store, where they are greeted by a person who scans that offer QR code and now has all context of what the customer was were looking at on the website and past interactions associated with them.
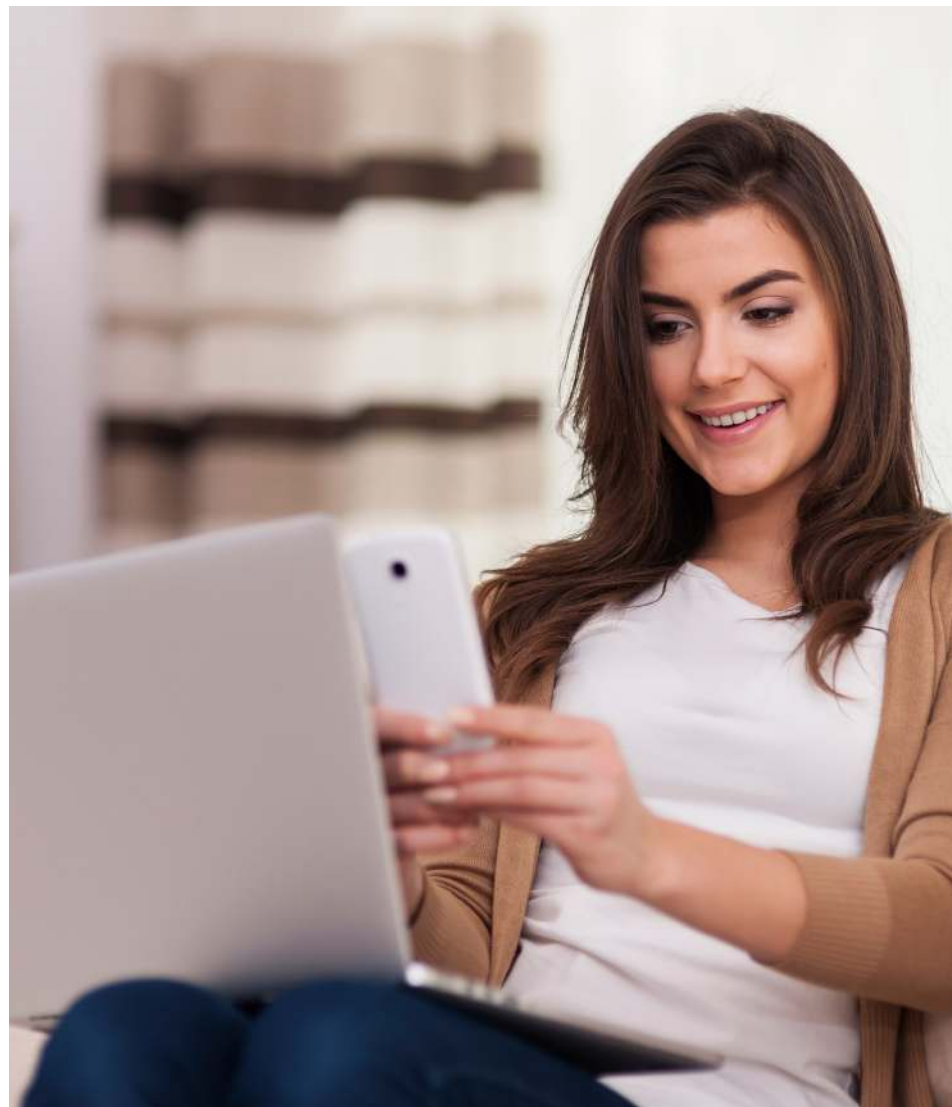
Omnichannel CX Implementation
Best Practice #2

**Identify the Customer Experience (CX) and Operational Metrics to Measure Success**

All customer experience metrics have their valid place, so the one(s) you will align with will depend on your business. No matter which experience metric you choose, the key best practice is to align the day-to-day operational metrics in the contact center to that customer experience metric to measure success.

Metrics

NPS | CES | CSAT

Omnichannel CX Implementation Best Practice #3

Adjust "The 3Rs" to Operationalize the Experience

As you take what you designed and the principles around context and adjusting measurement to what matters to drive customer experience, you want to also adjust the 3 Rs: Resources, Routing and Reporting.

1 Adjust training, skilling, and staffing of resources to align to the experience

2 Adjust web, voice and mobile self-service and assisted-service choices for customer channels by target customer segment

3 Adjust intraday and historical metrics for reporting

4 Adjust interaction routing rules using the the best practices shown on the next page
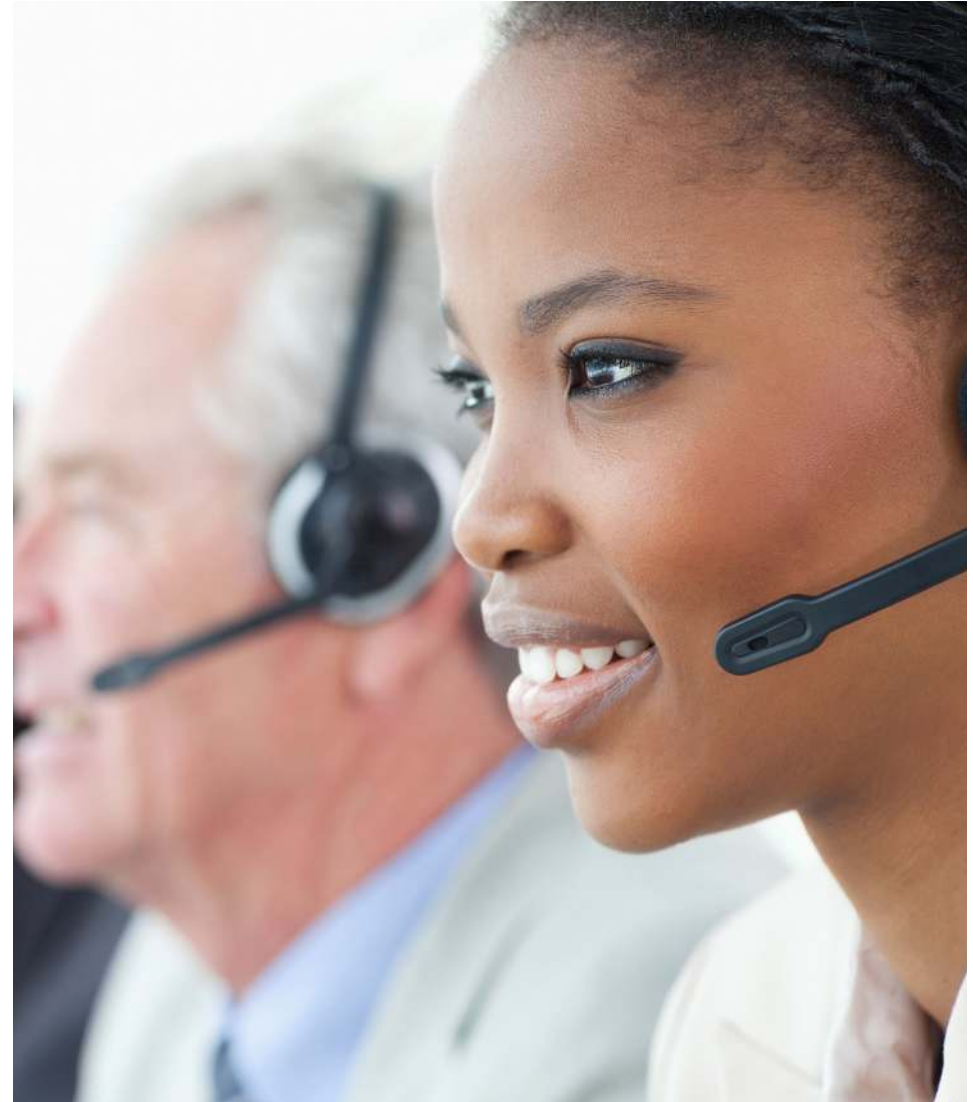
Best Practices in Defining Omnichannel Routing Rules

The who, what, where and what next framework for determining omnichannel routing rules.

IDENTIFY

- Who is it?
- Why are they contacting? What do they need? (Reason/Intent)
- What do we need to know about them? (Query Relevant History)

SEGMENT

- What segment are they in?
- What is their value?
- What have they done recently?
- What is their satisfaction?

OBJECTIVE

- Is there any other conversation going on?
- Any products/services to offer?
- Any activities to be completed?
- Any status to provide?

ROUTE

- What is the best resource to handle this request? Not all inquiries are destined for "Live" agent-assisted support
- Are delivery times reasonable?
- What resource options are available?

FULFILL

- Have we delivered what the customer asked for (e.g., Resolved)?
- Opportunity to cross-sell/up-sell?
- Do we need to transfer?
- Would they like to take a survey? (e.g., Customer Satisfaction)

Attaching Data

If Transfer - Repeat (Data Attached)

Customer Example of Intent Routing

Here is a proof point of how adjusting the 3 Rs can produce both improved customer experience and efficiencies. A large telecommunication provider was challenged with repetitive callers who represented 30-40% of their interactions.
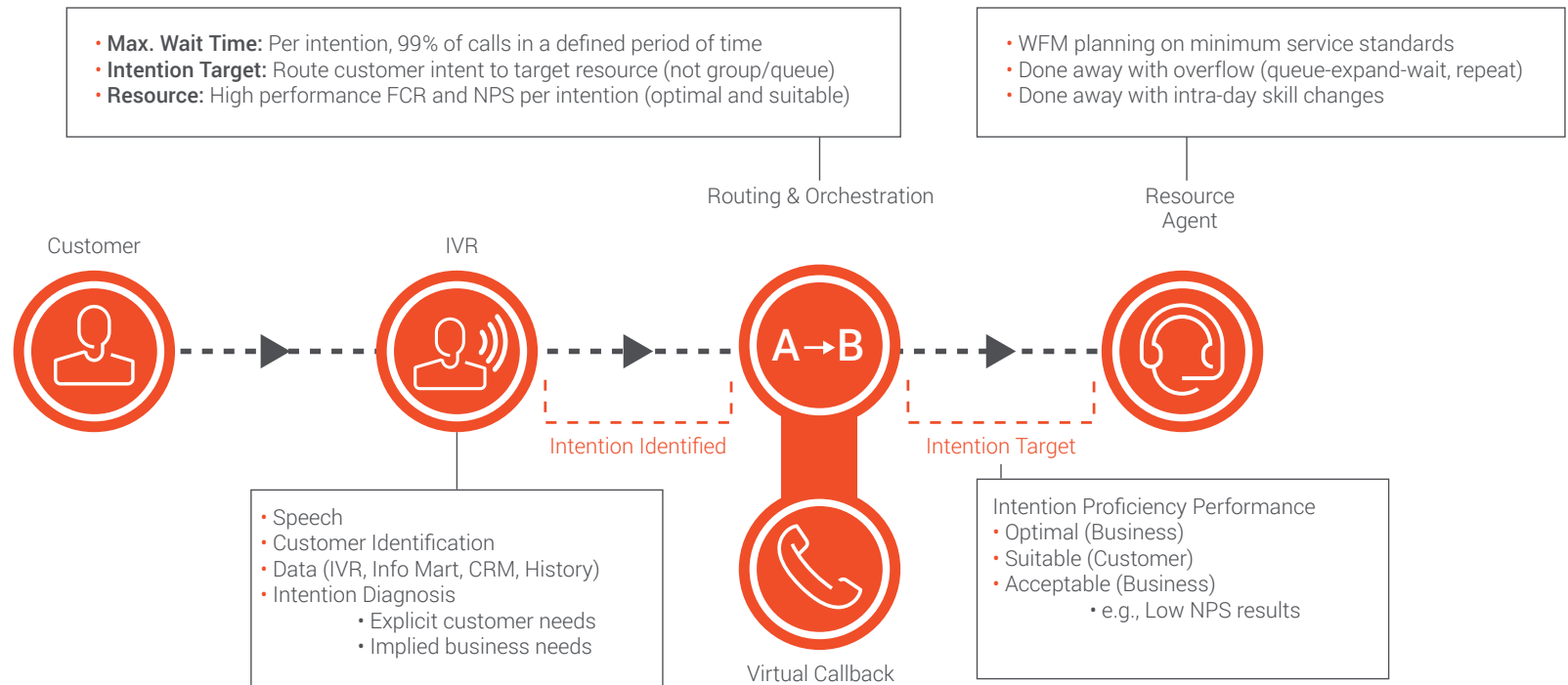
Upon analysis it was determined that the routing design was inconsistent with the corporate vision to drive Net Promoter Score (NPS) and First

Contact Resolution (FCR). Interactions bounced all over the organization and transfers to agents with minimal skill sets were the biggest driver of poor NPS.

The recommendation to adjust the cross-channel interactions based on aligning customer intention with the resource capacity and adjusting the service level ended up providing a better customer

experience. To adjust skilling to align resources to custom intentions required adding more skills, but now there were fewer skills per agent. As a result, the company saw an 8% improvement in FCR, 2% improvement in NPS – which translated to millions of dollars, an 11% reduction in transfers and an increase in employee satisfaction.

The employees now had far fewer frustrated customers.

- **Max. Wait Time:** Per intention, 99% of calls in a defined period of time
- **Intention Target:** Route customer intent to target resource (not group/queue)
- **Resource:** High performance FCR and NPS per intention (optimal and suitable)

- WFM planning on minimum service standards
- Done away with overflow (queue-expand-wait, repeat)
- Done away with intra-day skill changes

Routing & Orchestration

Resource
Agent

Customer

IVR

A→B

Intention Identified

Intention Target

- Speech
- Customer Identification
- Data (IVR, Info Mart, CRM, History)
- Intention Diagnosis
  - Explicit customer needs
  - Implied business needs

Virtual Callback

Intention Proficiency Performance
- Optimal (Business)
- Suitable (Customer)
- Acceptable (Business)
  - e.g., Low NPS results

Genesys Delivers a Seamless Omnichannel Customer Experience

Voice IVR

Website

Mobile App

Social

Marketing Promotion

Contact Center

Direct to Expert

Store/ Branch

Back Office

SELF-SERVICE

INBOUND / OUTBOUND

BACK OFFICE

WORKFORCE

Genesys
CUSTOMER EXPERIENCE
PLATFORM

CLOUD

HYBRID

PREMISE

Take your customer experience to the next level

Whether your goal is to improve customer experience, reduce customer effort, improve brand reputation or deliver an omnichannel experience, Genesys offers an open and scalable platform that leverages context and state across touchpoints and channels over time.
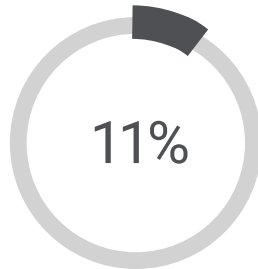
Industry leaders have achieved amazing results with the Genesys Customer Experience Platform leveraging context for an omnichannel experience such as:
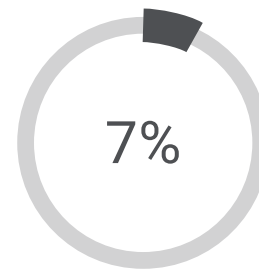
10%
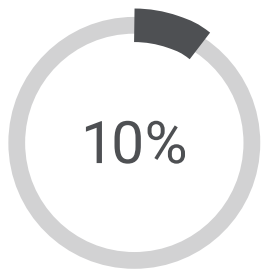
Customer satisfaction improvement through consistent omnichannel interaction

18%
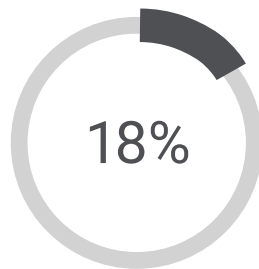
Improvement in resolution rates due to reduction in repeat calls interaction

11%

Reduction in transfer rates and costly misroutes

7%

Improvement in employee engagement with predictive models to inform and personalize interactions

Does your contact center have what it takes to deliver great CX?

Orchestrate seamless, omnichannel customer journeys from a single, all-in-one, customer experience platform. Available both on-premise and in the cloud, the Genesys Customer Experience Platform simplifies administration, increases operational performance, and reduces total cost of ownership.

For more information, contact:

Servion is trusted by customer-centric brands for architecting, implementing, and managing Contact Centers and Customer Experience (CX) solutions. Servion delivers complete solutions for businesses to innovate in providing digital experiences using the best available technologies while maximizing their existing investments.

Contact us at +04 2346333 or marketing@servion.com

Genesys® powers more than 25 billion of the world's best customer experiences each year. Our success comes from connecting employee and customer conversations on any channel, every day. Over 10,000 companies in more than 100 countries trust our #1 customer experience platform to drive great business outcomes. Genesys on-premise and cloud solutions are built to be fluid, instinctive and profoundly empowering. Combining the best of technology and human ingenuity, we work the way you think.