

A large white outline of a lightbulb with a base, set against a purple background. The bulb is surrounded by several short, thick yellow lines radiating outwards, suggesting light or energy. Inside the bulb, the text "FIVE STEPS TO GO FROM TRADITIONAL TO DIGITAL CX" is written in white and yellow. To the right of the bulb, a white staircase with five steps ascends. A person in a green shirt and dark pants is running up the top step with arms raised. Below the staircase, four other people are engaged in various activities: a man in a yellow shirt pointing up, a woman in a white top and yellow skirt pointing up, a woman in a light blue top kneeling and looking up, and a man in a dark shirt using a telescope. Dashed white lines with arrows connect the people to the staircase and the lightbulb, indicating a process or flow. A paper airplane is shown flying from the top step towards the top left of the lightbulb.

**FIVE  
STEPS**

**TO GO FROM**

**TRADITIONAL**

**TO**

**DIGITAL**

**CX**

*Crafting CX Solutions*

Most customer journeys today happen entirely online, from awareness (viewing an ad on social media) to evaluation (reading a review or engaging in an online community) to purchasing (eCommerce) to support (omnichannel and self-service). If companies want to meet customers where they are, they need to focus on developing a digital-first CX approach.

There's also the generational aspect of CX. The younger the person, the more likely they are to start their customer journey online. Gen Z'ers (born between 1997 and 2012) exist in a nearly fully digital world where offers like bank checks, cable TV, and newspapers are relics. Digital-first preferences that started with Millennials are even stronger with this generation, which is now the largest in history.

So, what happens if you ignore the digital aspect of customer experience? You'll fail to see how customers make decisions and interact with the different touchpoints along their journey, making it that much harder to give them what they want: less friction, more personalization, proactive engagement, etc. You'll also miss out on ways to improve costs and KPIs without compromising quality of service.

Among high-growth businesses, 60% of executives strongly agree that excellence in digital CX is key to organizational survival. This guide outlines five practical steps to develop a strong digital-first approach, regardless of experience.



# Secure leadership support



Your approach must be steadied by the hands of strong leaders who are committed to seeing success. The following questions will help you secure the right leadership support.

## **What is your organization's leadership culture? Do your leaders model the right behavior?**

Leadership culture is the way leaders operate, communicate, and make decisions. Every company has a leadership culture, for better or for worse. Are your leaders held to the same standards as those who report to them? Accountability, integrity, transparency, and authenticity should be core values that guide decisions. Just like customers can smell a sales ploy from a mile away, employees can sense leadership's intentions.

## **Do you have a leader dedicated to your digital CX strategy?**

When something is vital to your company's success, you establish clear ownership over it. Remember the dawn of the CISO (Chief Information Security Officer)? Back when businesses began to realize that cyber security threats were not only real but had

the potential to create tremendous losses, CISO positions were created at organizations with the resources to recruit, hire, and train one.

In today's world of digital-first CX, a Chief Customer Officer or a Chief Experience Officer is the equivalent of the CISO. A position such as this is key, so much so that digital CX leaders are more than twice as likely to have a titled officer than those that have made less progress. If you're serious about digital CX, you need to place your strategy within the purview of a dedicated expert.

## **Are your leaders and department heads aligned?**

Digital-first CX requires heavy inputs and cross-functional efforts (IT, executives, customer service, and marketing are widely regarded as the most-involved groups for digital CX initiatives). Execution of your digital-first plans requires appropriate representation from every key department. Doing so could be as simple as setting a recurring meeting or using collaboration tools that support free-flowing communication, which has become the norm in a post-COVID world. Clearly define roles, assign deliverables, and track and measure performance.



# Ensure change management



Change management is an enabling framework for managing the people side of change. Change is hard for employees, especially those who have been with you for a long time. When change happens smoothly, you'll have the support you need to fuel the large-scale, long-term transformation you're looking for. Here are our best recommendations for CX change management.

## Create awareness of the need to change.

Change initiatives never succeed without an understanding of the greater “why”:

- ① Communicate the problem at a high-level and clearly articulate why creating a digital-first CX approach is necessary. Give this careful thought, you only have one chance to introduce this messaging. Keep things easy to understand with every day, bottom line language. Don't overwhelm or intimidate and be prepared to back up any assertions with numbers.
- ② Bring color to the picture with specific scenarios. Does it take longer than your customers expect or like to resolve issues? Do they expect service in channels your business doesn't currently support? Maybe you have the right channels, but customers don't get the help they expect at the time they need it. These kinds of details help employees understand why change is needed.
- ③ Ask your employees open-ended questions that get them thinking about digital CX. What happens in the customer's world when you

don't understand their whole journey? What happens when you can't share knowledge, guide a customer to resolution, or anticipate their needs?

### Create a vision for change.

Once everyone within your organization is aware of the problem (your current state of CX) and the solution (the need for a digital-first approach), you'll need to clearly define what your future state of CX will look like and what impact it will have on the business. Discuss the benefits and risks of the change and address any employee fears or concerns (never stifle employee curiosity or creativity in this process). Reiterate that there's no such thing as "passing the buck." Leadership will be there every step of the way and will make good on their promises.

### Empower your team throughout the change.

It's not about you saying "jump" and them asking how high. You're all in this together.

- Treat employees like the CX stakeholders they are by providing ownership of the change.
- Give them the tools and training necessary to develop new skills so they can fully support digital-first CX implementation. For example, you can train your digital team on dialog creation and management or your enterprise application teams on how to extract customer journey data from the applications they are embedded in. You might also want to

consult experts on integration with voice, which is still a critical channel when escalation is needed.

- Set targets and attainable goals so that it's easy to measure the initiative's success one step at a time. For example, deploy a chatbot or voice bot for a specific, well contained use case. This will enable you to get familiar with the technology and its potential, iron out any initial wrinkles, and understand the scope and depth of change management that's needed – all in a way that's controlled and easy to track.

When your team feels they play an identifiable, essential role in the change process, they'll stay bought in throughout the life of the initiative.

### Sustain the change with reinforcement.

Reinforce your team's efforts. Be transparent about progress, and don't forget to celebrate milestones along the way. Recognition and reward go a long way toward reinforcing desired outcomes and sustaining commitment to the process.

Keep in mind, though, that your plan will never be "done." Your business and the definition of "digital-first" will evolve along with changing consumer demographics. Keep an eye on shifting customer needs, new competitors, and potential points of resistance. Make sure your messaging is consistent and unified and that you provide ongoing coaching and training to ensure continuous improvement and long-term success.



# Adopt the right digital channels, incrementally add on, and establish metrics to measure success



Your heaviest digital CX decisions will focus on service channels. There are many to adopt outside of phone and email: social media, live chat, chat bots, a self-service knowledge base, customer forums...the list goes on. With new channels come new processes and resources and a slew of KPIs to track that you never had before. Each channel may also have different owners who need to communicate and collaborate. Here's how you can take what feels complex and make it simple:

## Take an incremental approach.

You don't need to adopt every channel at once. Deciding which digital channels your organization should pursue first will depend on many factors including what you're selling, your target audience, and your budget. If you've created buyer personas for marketing purposes, leverage these to determine who your customers and prospects are and which channels they're most likely to use to contact your company. Don't forget the generational aspect of CX. Boomers, Millennials, Gen Zers – what do they prefer to use and how?

## Think strategically about metrics for digital CX success.

A CX metric is a way to track and measure a customer's experience

with your product. The key goal for using CX metrics is to make sure that your customers are satisfied (a.k.a. experiencing minimal friction) and stay for the long-term. Here are some trends we're currently seeing...

- Some businesses are shifting away from long-held metrics like Average Handle Time (AHT) that focus more on agent performance and cost savings than CX success (after all, customers don't care how long a phone call lasts if the agent is actively working to solve a problem).
- Other businesses are taking steps to innovate metrics like CSAT (this is the satisfaction survey a customer is asked to wait on the line for or the link circled at the bottom of their receipt after an in-store purchase to rate their service). Adding options for more contextual, real-time follow-up improves response rates, especially among younger customers. For example, a text message saying, "Thanks for calling us! If you have a moment, we'd love to hear how your experience went. Click here to complete our 2-minute survey."



# Connect your traditional and digital channels for seamless cx



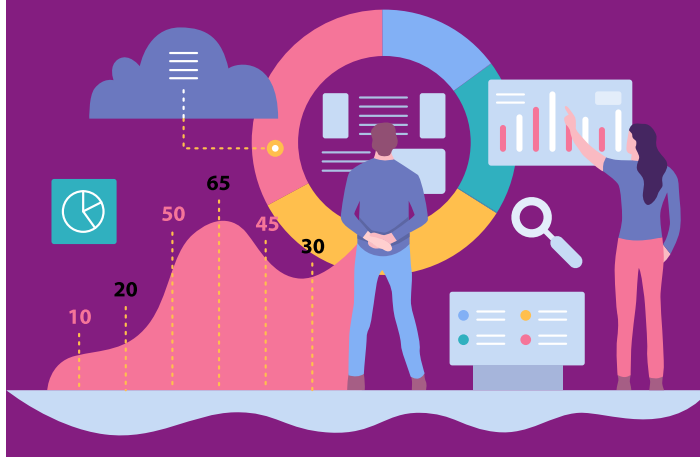
A customer's relationship with a brand is the sum of all their interactions, not just a single purchase or action. Every touchpoint, from viewing a digital ad to troubleshooting on the phone with customer support to chatting with a bot, is part of the customer experience. How can you ensure all your channels – both traditional and digital – are seamlessly integrated to reduce customer friction?

**Leverage cloud-based contact center and CX tools that take all your customer interaction data and make it easily accessible from a single platform.**

Use these tools to aggregate data from all your channels – phone, live chat, social media, etc. – and provide meaningful insight into your customer journey. For example: if Cameron Consumer contacted your company with a question via social media, the right technology integrations will ensure the record of that interaction is saved under Cameron's customer profile. So, when Cameron comes back to live chat with a question about the product he bought after clicking on your social ad, your agent is already aware of his entire history with your company.

Cameron never has to explain something he's already explained before (making his life easier and your agent's workload lighter), and his overall experience is enhanced. He's delightfully surprised by the recognition, and it promotes higher lifetime value.

# Look at what your data is telling you



Every chat session, social mention, and website click drops a breadcrumb of data about who a customer is, what they want, and where they're experiencing friction. Applying AI around this data can uncover actionable insights that are extremely valuable for improving your digital CX:

- ⦿ You'll figure out why customers are dropping at certain points in their journey to make quick and meaningful improvements.
- ⦿ You'll begin to better understand customers so you can anticipate their needs (what channels they prefer, what time of day they prefer outreach, etc.) and get ahead of problems, sometimes before they're even aware.
- ⦿ You'll keep a finger on the pulse of evolving needs to consistently deliver intuitive, personalized service.

Orchestrating these kinds of seamless, proactive, contextual customer experiences requires *a lot* of data insight and analytics. Thankfully, we know someone who can handle this and every other step of digital-first CX for you.



# Start your digital-first cx journey

Digital-first CX is what Servion does best. Our team of experts will help you:

Connect seamless customer experiences across both physical and digital channels through customer journey visualization

Apply intelligence to your data to derive incredibly valuable, actionable insights

Layer the right data and knowledge on top of every customer interaction to create more meaningful experiences while maintaining speed and efficiency

Move away from reactive service so you can wow your customers with service that's predictive, proactive, and frictionless

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[Meeting the New CX Digital-First Mandate: Are You Leading or Falling Behind?](#)

[Digital customer experience: Everything to know in 2022](#)

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with our digital CX experts.

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