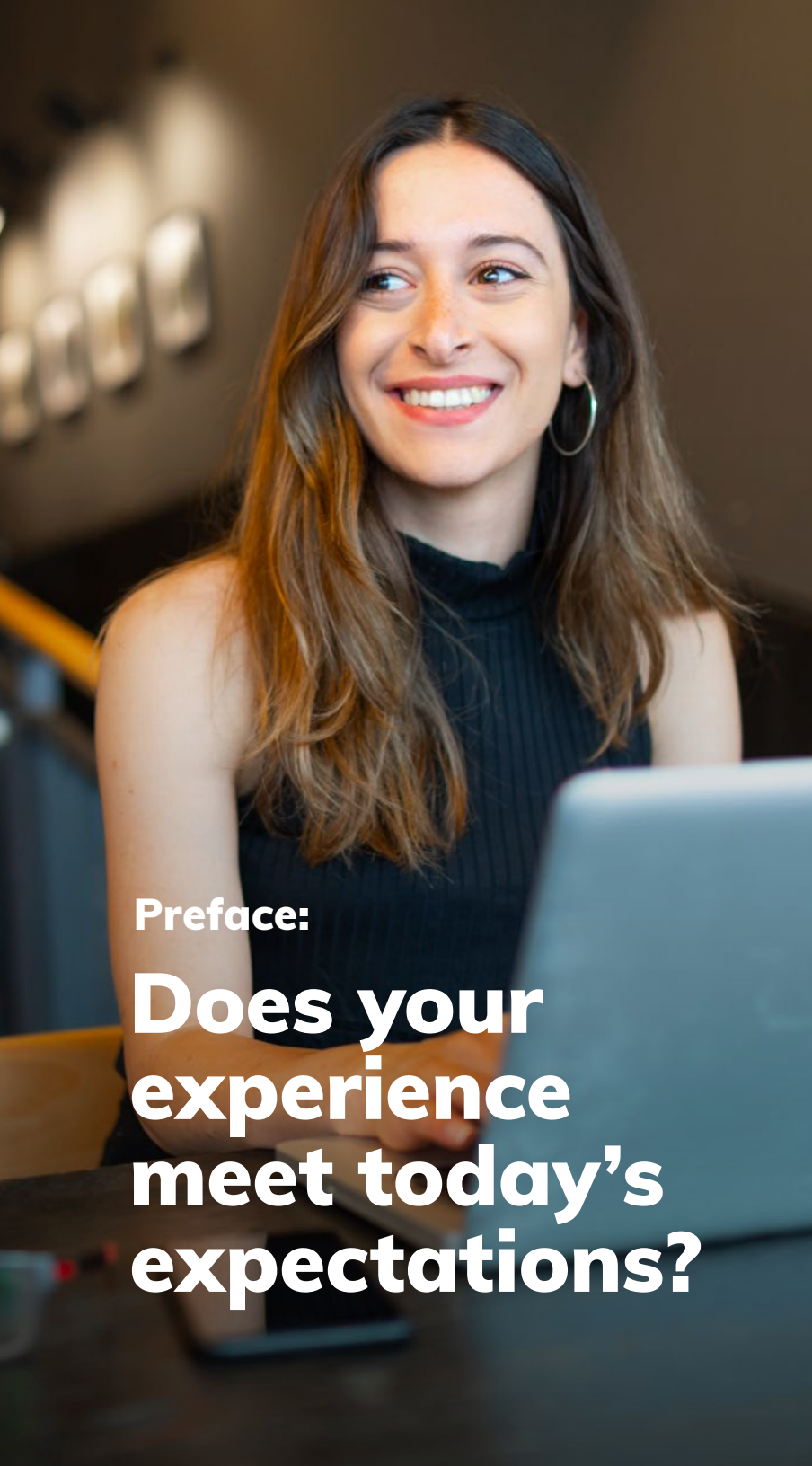


# 14 innovative personalization ideas for the digital-first customer



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**Preface:**

**Does your  
experience  
meet today's  
expectations?**

Prior to 2020, customer personalization was a nice thought.

Many contact leaders struggled with providing the ideal experience with departmental silos, legacy systems, fragmented customer data, and disjointed customer journeys standing in the way of their ability to personalize.

Overcoming these hurdles requires a fundamental shift in how businesses operate. It requires transforming the systems, processes, and technologies to center around the customer. With this caliber of effort, contact center leaders addressed change at their own speed—even if they knew change was inevitable.

And then, a massive global pandemic shifted everything. Customers and businesses made the switch from in-person to online. And customer behaviors changed rapidly: they used an average of 10 channels of communication<sup>1</sup> and increased their use of digital channels<sup>2</sup>, online shopping<sup>3</sup>, and preference for self-service.<sup>4</sup>

Customer expectations outpaced experiences companies could deliver. The pandemic exposed gaps in companies' technologies, service channels, operations, staff skill sets, and ability to comply.<sup>5</sup> As a result, most businesses accelerated their digital transformation plans.<sup>6</sup>

And for consumers, a new bar was set for expectations moving forward:

**59%**

of customers say the pandemic raised their standards for customer service<sup>7</sup>

The prominent role of digital self-service and agent-assisted channels has changed the relationship between businesses and their customers. Customers expect to be recognized with the same level of service regardless of channel.<sup>8</sup> They expect to solve complex issues with one person.<sup>9</sup> Agents must be knowledgeable; customer journeys effortless, seamless, and quick, or companies risk losing their customers:

- 57% of customers have stopped buying from a company because a competitor provided a better experience.<sup>10</sup>

Companies who invest in customer experience improvements are seeing the benefits:

- 81% of organizations see CX as a differentiator and the number one indicator of strategic performance.<sup>11</sup>

Because of that, building a more human, individual connection is critical and 87% of companies say customers expect omnichannel personalization<sup>12</sup>. In a digital-first world, customer experience personalization is business CX survival.

Proactive personalization is the emerging contact center imperative that's transforming digital customer expectations across generations, industries, and continents.

Today and tomorrow, digital personalization is your most powerful customer experience differentiator.

Customer experience personalization is no longer a "nice-to-have." It's a "must-have."

## What does personalization mean for the contact center?

**Proactive personalization** is using customer history and interaction data to provide unique experiences at or before the moment of customer need.

# Get personal with leading CX experts

To get personalization right, we asked for some expert advice from leading customer experience experts. Next-gen personalization is a brave new highway, and change is accelerating. Their four unique perspectives will help you navigate your personalized path forward.

This list of expert personalization ideas will help you satisfy and exceed your digital-first customers' expectations no matter where your starting line with personalization begins. Before any company can implement innovative ideas for personalization, they'll need to get the fundamentals down first. This book is ordered to help you achieve personalization from the ground up.



**Charlene Li**

Founder and Senior Fellow, Altimeter



As founder of the disruptive analyst firm Altimeter and graduate of Harvard Business School, Charlene has cultivated two decades of expertise on digital transformation, leadership, customer experience, and the future of work. She has been named one of the most creative people in business by *Fast Company* and helps organizations disrupt the mold of their industries by providing business leaders with executive support, speaking, training, and advisory and board work. Charlene is also a distinguished author of six books, including the *New York Times* bestseller *Open Leadership*, and co-author of the critically acclaimed book *Groundswell*. Look for her latest book, bestseller *The Disruption Mindset*.



**Vit Horky**

Senior Director of Digital Experience, NICE CXone



Before settling in as the expert on digital experience for NICE CXone, Vit co-founded one of the top-rated digital customer care platforms. An ambitious entrepreneur, this was his third disruption-focused business. He's also published a book about the future of CX, *Customer Service in the Transhuman Age*, and continues to lend his expertise to the world of customer experience through trainings, online articles and blogs, and business consultations. Horky understands that customer experience is the key to successful customer care.



## Jo Boswell

Founder, Sentio-B



As the founder and director of UK-based Sentio-B, a customer experience consulting firm, Jo provides CX transformation expertise and coaching services to global organizations across a range of sectors. She advises customer experience leaders on becoming more customer-centric by using data, insight, and technology to improve customer experience, as well as how to achieve the necessary internal alignment to support change initiatives. At her previous 27-year career in several leadership roles at British Airways culminating in Head of Customer Value Management, Jo was the driving force behind the airline's "Know Me" initiative, a successful cross-functional transformation strategy. Jo's clients benefit from her first-hand experience and specialization in transforming the customer experience and delivering personalization at scale.



## Jeannie Walters

Founder and CEO, Experience Investigators



Jeannie's role as Founder and CEO at Experience Investigators and Certified Customer Experience Professional (CCXP) promotes one mission: To Create Fewer Ruined Days for Customers™. Hundreds of companies, from small businesses to Fortune 500s, have relied on Jeannie's expertise to consult, train, and speak on how to improve customer loyalty and retention, employee engagement, and overall customer experience. Jeannie's writings have appeared in Forbes, CustomerThink, The Future of Customer Engagement and Commerce, and My Customer, as well as university-level textbooks. She was named in the Huffington Post as one of the "Top 100 Most Social Customer Service Pros on Twitter," in the Online Marketing Institute's "Top 20 Digital Marketing Strategists," one of DemandLab's "5 Women Who Are Leading the Charge in B2B CX," and as "One of the Top Customer Experience Influencers to Know" by CXPA.

# Personalization fundamentals come first

**Idea 1: Start by laying a foundation based on your maturity**

**Idea 2: Create seamless journeys in channels your customers prefer**

**Idea 3: Use empathy to prioritize personalization tactics**

**Idea 4: Start small and scale**





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## Idea 1: Start by laying a foundation based on your maturity



Charlene Li  
Founder and Senior Fellow, Altimeter

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Personalizing your customer experience requires more than just the latest technology. The first step is to organize everything you do around your customer. Sounds obvious, right? But it isn't always—particularly with legacy systems, fragmented data and channels, and silos standing in the way.

“The vast majority of people have no right to be talking about personalization right now. They're not even doing the basics correctly,” Li cautions.

Before getting lured by all the bells and whistles vying for your attention and buying into the art of what's possible, take a realistic look at your goals against your current set of capabilities, or personalization maturity.

“If you're at a stage one or two then you probably shouldn't be looking at technologies that support stage five,” she says.

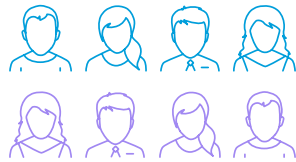


# Stages of personalization maturity



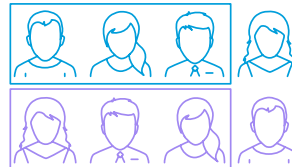
## Stage 1: Generic

Batch, one-size-fits-all outreach



## Stage 2: Segmentation

One-to-many reactive approach based on demographic groups or customer segments



## Stage 3: Persona segmentation

One-to-some reactive approach based on targeting personas within demographic groups or customer segments based on defined behavior patterns



## Stage 4: Micro-behavioral segmentation

One-to-few approach based on segment or persona demographics in addition to more refined behaviors, interests, and buying intent



## Stage 5: Hyper-personalized

Proactive one-to-one custom experience based on real-time and historic demographic, behavioral, and interaction data

Once you identify your current stage, you can evaluate what's keeping you from reaching the next stage of your maturity—whether it's your processes, systems, or operational structures. Regardless of your maturity stage, personalization in its most simple form is using customer interaction data to improve the experience. And to get that right, Li implores you to get to know your customers.

“Customers expect you to know them.”



**Charlene Li**  
Founder and Senior Fellow, Altimeter

Your stage of maturity matters because effective personalization is an inside job. Lower stage maturity can start with a realignment inside your organization around the customer; it may require breaking down functional silos and integrating fragmented customer data.

Li adds: “The long-term goal is a fully customer-centric strategy where you know the customer so well, you can anticipate when and why they need service.”

That's personalization.

## One company's proactive communications plan

A major insurance company doesn't cover most name-brand prescription drugs. When doctors prescribe a name brand and customers get denied by the pharmacy or receive a \$500 bill, they are less than pleased. To address this friction, the company created a multi-departmental team and developed a proactive communications plan for affected subscribers. Proactive outreach to these customers included a link or toll-free number where they could access ways to save money on prescriptions. This multi-layered plan involved staffing the contact center with a team of pharmacists to support incoming interactions routed to them based on demographic data and communication history.





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## Idea 2: Create seamless journeys in channels your customers prefer



Vit Horky  
Senior Director of Digital Experience, NICE CXone

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Your company doesn't have one front door for customer experience—you have [more than 30 primarily digital channels](#) and counting. And as customers increase digital use across a wider variety of platforms, they demand an experience that matches their expectations.

Often, self-service channels are your customers' first step, and calling for help is often the last action a customer takes. Also [Gartner predicts](#) that “By 2025, 40% of customer service organizations will have abandoned native mobile apps in favor of messaging for a better customer experience.”<sup>13</sup>

NICE findings similarly indicate a significant increase in the use of public and private [messaging apps](#):

“There's a consumer-led shift from emails to social media and messaging and an increasing number of companies downsizing email,” Horky says. “Contact centers are also more frequently adopting popular messaging services, like WhatsApp, Apple Business Chat, or WeChat.”

However, simply offering the channels your customers prefer isn't personal enough. Bolting them on can result in a fragmented journey. Customers expect consistent quality and to effortlessly move between self-service and agent-assisted digital channels in a way that feels channel-less.

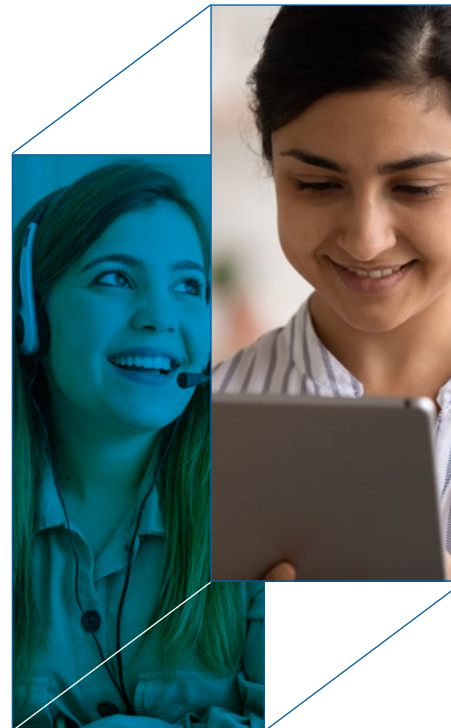
## The goal of next-gen digital fluency is hyper-personalization.

**Hyper-personalization** is a uniquely tailored experience dynamic to the context, device, or channel, based on the customer's intent or behavior in that moment, where a company knows a customer so well it can proactively anticipate and respond to their needs in real time.

To achieve hyper-personalization, an effective unified cloud platform should capture a single view of real-time cross-channel customer activity and interactions. Then leveraging AI, companies can use insights to predict and proactively respond to individual needs at the right time and place and in the best channel.

This technology helps companies scale personalization on digital channels in ways like:

- Recognizing the same customer on any channel to pick up where they left off
- Sending outbound messages for milestones like birthdays and anniversaries
- Transparently addressing service failures
- Responding to customer comments
- Recommending content, products, or offers that most fit customer needs



# 80%

of customers expect the same level of service regardless of where they engage<sup>14</sup>

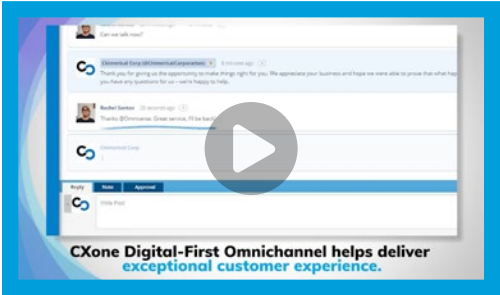
# 63%

of customers expect companies to recognize them wherever they engage<sup>15</sup>

# 76%

of customers expect consistent interactions across channels, but more than half report that's not the case<sup>16</sup>

Digital channels are one area that customer behaviors are evolving. A single platform that enables adding on digital channels as customers continue to grow will help futureproof your personalization efforts.



See how modern cloud contact center software supports digital-first omnichannel in this quick 3-minute overview.

[Watch now »](#)

### Domino's delivers cross-channel convenience.

Domino's customers can order pizza in more than 11 channels, including phone, app, Facebook messenger, Twitter, text, smart watch, and smart assistants. And, whenever a customer post indicates negative feedback and sentiment, they enter an outbound queue where agents immediately act. For one promotional campaign, Domino's sent any posts where users mentioned being hungry or craving Domino's with personalized coupon offers.<sup>17</sup>



<sup>17</sup> This example of hyper-personalization is for educational and informational purposes only. Domino's does not sponsor or endorse NICE products or services.





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### Idea 3: Use empathy to prioritize personalization tactics



Charlene Li  
Founder and Senior Fellow, Altimeter

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The root of common sense is empathy.<sup>18</sup> But to get empathy right, you need to walk in your customer's shoes. For instance, knowing and providing accurate product inventory seems like a common-sense request, but some companies' physical and digital stock aren't integrated in a way that allows this.

Empathy is required to build trust and customer loyalty. Recognizing it is the first step in validating the customer's pain, but not everyone knows how to do this. Advances in AI technology can assess tone, pitch frequency, and other indicators to help agents understand customer sentiment in real time and better gauge when they should respond empathetically.

“Teaching empathy is like putting on empathy goggles—creating a new way to see others. I call it ‘artificial empathy,’ like artificial intelligence. Both are important to the success of customer relationships.”

Consistency and reliability also build trust, which is increasingly critical for online customers in the absence of face-to-face, brick-and-mortar experiences. As trust deepens over time, customers create personalized associations with brands, many of them unconscious, which contributes significantly to a “sticky” customer experience.

# Exercise to try: empathy mapping

Here's a powerful tool that can help you approach the challenge of scaling empathy in the contact center. It's called an "Empathy Map," a journey-mapping exercise that gives all stakeholders in the organization, including contact center agents, a focused lens to facilitate a 360-degree customer view. These emotional profiles are not just one and done. They should be constantly revisited and reimaged, as the business, the market, the culture, and the world change.

**The exercise:** At every interaction on the customer journey for each of your customer personas, fulfill the quadrant below:

<b>Think:</b>	<b>Feel:</b>
<b>Say:</b>	<b>Do:</b>

**Example 1: Customer Persona:** Prospective customer

**Interaction:** Filling out a lengthy information form.

<b>Think:</b> This is ridiculous. I just want to explore some insurance options.	<b>Feel:</b> This is so frustrating. This organization does not care about me.
<b>Say:</b> Why do you need all this info?	<b>Do:</b> Abandon and go elsewhere.

**Example 2: Customer Persona:** Existing customer

**Interaction:** Web search "How to complete Zelle money transfer?"

<b>Think:</b> My transfer did not go through. I'll Google it.	<b>Feel:</b> This is scary. Where is my money?
<b>Say:</b> I wonder what happened to my money. Did it go through?	<b>Do:</b> Call bank in a state of fear and alarm.



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## Idea 4: Start small and scale



Jo Boswell  
Founder, Sentio-B

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Achieving Amazon- or Disney-level personalization can feel overwhelming for any business. But it doesn't have to be.

"To start, encourage a 'test and learn' mentality," Boswell recommends.

Developing a roadmap tying technology to your objectives and customer outcomes is the first starting place, but then maximizing your existing technology for personalization can help build the foundational alignment necessary to commit to new systems, processes, and technologies.

You don't have to tackle the whole elephant or worry about the full 360-degree experience at first. Just pick a salient pain point with the customer at the center. Then, build a fix, breaking any silos down along the way to achieve the desired solution.

"Have a destination in mind, but don't be afraid to take low-cost, simple actions," Boswell says. "You'll get an absolute shedload of insight and data to help understand the impact."

"Have a destination in mind, but don't be afraid to take low-cost, simple actions."



A short-term rudimentary approach—using existing technology, where you set and measure success against goals—can help you determine a qualitative understanding of what’s needed to scale and the impact it could have on your business.

### A lesson in acknowledging friction

One of the developments at British Airways that Boswell initiated was to identify major service failures that made customers angry—for example, a significantly delayed flight. Prefacing their customary satisfaction survey with an acknowledgement and apology for the service problems, the company showed they heard the customer, and mitigated escalating anger further by addressing in-progress actions.



## Example application of the test-and-learn approach



### Identify high-impact opportunity to address customer friction

After surveying agents and looking at existing satisfaction scores, we noticed a service failure impacting many customers.



### Architect a solution using existing technology

We downloaded weekly reports of the impacted contacts and assigned a small group of agents to perform outbound outreach with a script to apologize and provide insight into when the failure would be fully resolved.



### Measure success

Survey responses informed likelihood to repeat purchase, NPS scores, and CSAT post-agent outreach.



### Make business case and scale

Once data aligned to show successful effort, we enabled scaling by proving ROI of technology.



# Using data for effective personalization

**Idea 5: Put your CRM to work**

**Idea 6: Personalization is only as strong  
as your data governance**

**Idea 7: Transparently address your use  
of customer data**



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## Idea 5: Put your CRM to work



Jeannie Walters  
Founder and CEO, Experience Investigators

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“Customers want to be recognized for who they are and where they are on their journey,” Walters says.

96%

of customers surveyed expect companies to make inquiries easy without the need to repeat information<sup>19</sup>

75%

of respondents expect the agent to know who they are and their purchase history<sup>20</sup>


59%

of customers expect tailored engagement based on past interactions<sup>21</sup>

A primary component of knowing your customer and personalizing their experience is your CRM and its integration with your contact center. A facile [CRM integration](#) captures cross-channel interaction data and enables customer data to pass to and from channels seamlessly.

Integrating your CRM or customer journey data in a streamlined desktop view gives agents everything they need to deliver personalized customer service experiences across any channel. They can see data like the customer's sentiment, what channel they came from, the keywords they searched prior to landing on your site, and which knowledge base articles they've already used to try to solve their issue. All these clues help agents build personalized rapport with a customer, and enable them to diagnose and solve the customer's immediate unique need.

By putting your CRM to work, you will greatly reduce your customers' effort so that they don't have to repeat themselves along the way, whether it's from self-service to agent escalation or from digital channel to voice.



The image shows the cover of a report titled "2020 Customer Experience (CX) Transformation Benchmark" by NICE CXone. The cover features a man in a grey shirt sitting at a desk with a laptop, looking at the screen. The background is white with a blue and purple circular graphic behind the man. The text on the cover includes "2020 Customer Experience (CX) Transformation Benchmark" and "Survey of Global Businesses". The NICE CXone logo is in the bottom left corner.

See more new data from your peers and customers in NICE CX Transformation Benchmark report.

[\*\*Access the data »\*\*](#)



## Idea 6: Personalization is only as strong as your data governance



Jo Boswell  
Founder, Sentio-B

Personalization begins by knowing your customer intimately—understanding what they want and how they behave. Access to accurate and quality customer data is essential for this level of awareness. But think of all the physical and digital touchpoints just one customer accesses throughout their journey—attempting this same understanding for hundreds of customers is tricky.

Boswell has seen companies of all sizes face the burden of accessing and interpreting a full view of the customer journey. From legacy systems and budgetary constraints to a proliferation of systems that don't talk to each other, aggregating siloed data from multiple systems becomes seemingly impossible.

# 89%

of IT leaders say integration challenges slow or hinder their digital transformation<sup>22</sup>

# 43%

More than 43% of companies lack real-time reporting capabilities<sup>24</sup>

On average, companies use 16 different technology applications with customer data and 25 different data sources for generating customer insights and engagement<sup>23</sup>

The first step to organizing your data architecture is to understand the end goal. That is, what you hope to achieve through personalization. More traffic? Less cart abandonment? Improved customer retention? Upsell existing customers? Once you determine that goal, you can better isolate the metrics you'll most need for cross-channel measurement and begin solving the data puzzle.

"It's most important to ensure you capture customer interactions at the individual customer level at all stages throughout their journey," Boswell says.

Many cloud contact center platforms include [single-view, integrated self-service, and agent-assisted interaction data](#) as a core capability. But if new technology isn't a feasible option for right now, and capturing an accurate understanding of customer friction is a challenge, Boswell has some advice:

"Even if you haven't addressed data and analytics challenges to uncover friction in the customer experience, often, agents will know what processes are the most broken because they're on the receiving end."

But don't rest there. Strive for an architecture of consistent and uniform quality data aligned to your goals. Boswell suggests companies with fragmented customer data can begin by ensuring each customer data system captures data for individual customers by a unique customer identifier consistent across each system. This customer ID can be used to marry data together across systems and create a singular customer profile.

Once you have the foundation of data that tracks your important customer metrics down to the individual level, you can begin to use this insight to establish rapport and personalize the experience.

The goal is hyper-personalization, which requires a shift in customer experience mindset from reactive to proactive. With hyper-personalization, you can use data to predict customer desires and behaviors before they happen.

Using next-gen tools like AI, natural language processing, machine learning, and predictive analytics, you can automate proactive real-time personalization. Whether your customer needs help with order management, service requests, medical appointments, financial transactions, or travel interruptions, you are there.

"Data is the essential fuel for personalization but good quality data is vital for successful deployment," Boswell says. "A rigorous approach to data governance and quality can help overcome the limitations of siloed data and builds trust with internal users."



Consolidating customer data a challenge for you? Advice from Aberdeen might help.

[Get your copy »](#)



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## Idea 7: Transparently address your use of customer data



Jeannie Walters  
Founder and CEO, Experience Investigators

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When it comes to the use of customer data, issues such as ethics, security, privacy and compliance are primary concerns. But when customer data is used responsibly to improve the customer's experience, it can be a win-win.

"As humans, we are very willing to give information if we get better recommendations from Nordstrom, right?" Walters says.

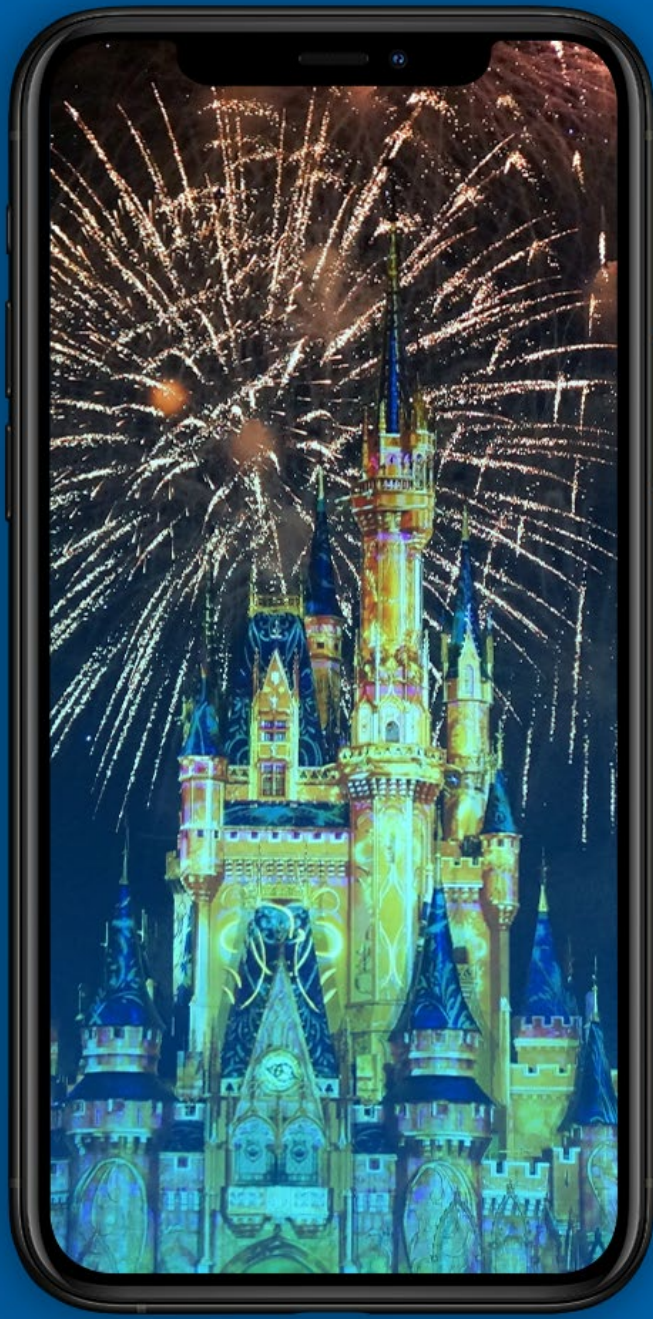
Transparency is a strong personalization strategy and a growing competitive differentiator. It's important to keep in mind that:

# 86%

of consumers want more transparency over how their personal information is used<sup>25</sup>

Companies should create clear data policies indicating what data is used and how the use of data directly benefits customers.

"We have to give people control over their own data and information and transparency on how it's used," Walters says.



## The magic—and transparency—of Disney

When customers visit Disney parks, they can use a smart wristband or App that connects to their digital payment methods, food credits, fast pass tickets, helps manage reservations, and can act as hotel room keys. Pairing this technology with built-in sensors throughout the park, Disney overcomes friction in guest experiences. For instance, it tracks park congestion and line queues to transparently alert guests to wait times, allocates appropriate quantity of employees and incentivizes alternative rides to improve traffic flow. Or if a ride breaks down, Disney can send impacted guests fast pass tickets to keep them happy. When guests arrive to their dinner reservations, staff can greet them by name. And park photos get sent to user's account each day. Disney is fully transparent with guests, explaining what customer data they collect, how it's collected, and why that data is needed on their website.<sup>26</sup>

<sup>26</sup> This example of hyper-personalization is for educational and informational purposes only. Disney does not sponsor or endorse NICE products or services.



A photograph of two women in an office environment. One woman is seated and holding a tablet, while the other stands behind her, leaning over to look at the screen. They appear to be in a collaborative work setting. The lighting is soft and natural, suggesting a window in the background.

# Maintain human- to-human personalization in a digital world

**Idea 8: Build an agent and  
customer feedback loop**

**Idea 9: Empower agents with agency**



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## Idea 8: Build an agent and customer feedback loop



Jo Boswell  
Founder, Sentio-B

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Beyond evaluating interaction data for opportunities to improve the customer experience, companies should regularly [survey and seek customer feedback](#) and use this information to address and make improvements.

“If you’ve done something bad to a customer, it might make sense to suppress all further marketing communications to them until you’ve settled that issue, or if you’re in the process of sending a customer survey, it might be a good idea to acknowledge the shortfall,” Boswell says.

[Customer feedback](#) can be a potent personalization tool, especially when agents take ownership of finding the best solution. Full-circle support is a process that includes personalized acknowledgement of an inquiry, status of the change, and updates along the way. Customers feel heard and seen when their feedback triggers action, and agents feel more engaged when they can provide updates.

By incorporating a formalized agent feedback mechanism, you’re not only helping agents be part of the solution, you’re benefiting from their front-line insight.

However, regularly seeking agent and customer feedback is just half of the equation. What you do with that data is integral. Closing the feedback loop by training your agents on what to look for and how to address it or by automating outbound communication that addresses updates are ways to personalize and proactively improve customer experience.

“Closing the feedback loop is an opportunity to really stand out as so few companies follow through in this way,” Boswell says. “It reinforces to the customer that the organization is listening to them as an individual.”

## Unified communications better close the loop

One company formalized an agent feedback mechanism using their internal communication and collaboration tool, [Microsoft Teams](#). Mimicking an IT ticket submission and response process, agents were incentivized to submit “escalations” to this channel, and the company’s owner of the escalation was required to respond and address the escalation. These escalations integrated within their CRM, and agents were trained to navigate the CRM for customers’ recent or open tickets and thank the customers for their input, provide status updates or address how they resolved the issue.





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## Idea 9: Empower agents with agency



Jeannie Walters

Founder and CEO, Experience Investigators

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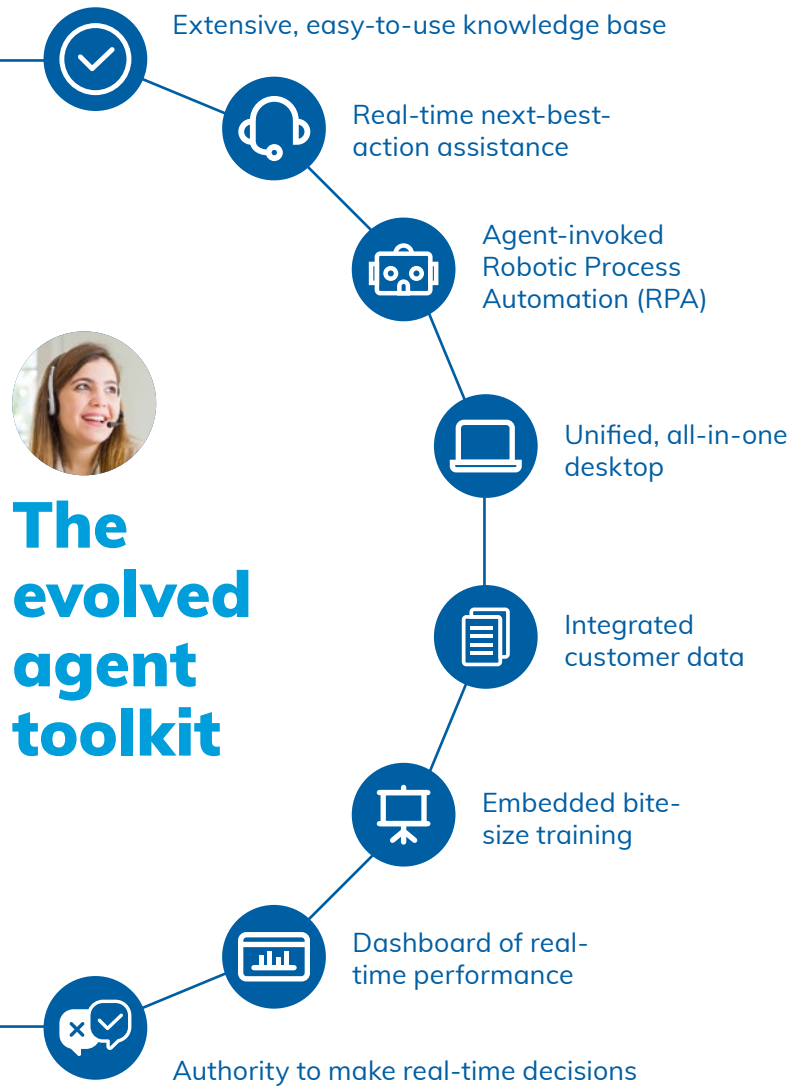
The responsibilities of agents are shifting. Contact center agents have become more than problem solvers, and their roles can now include public relations, sales, marketing, billing, and operations. They are the face, voice, and keyboard of your enterprise.

“We need to stop thinking about agent roles as responsive and think about how we can empower our agents proactively.”

Equipping your workforce with the tools and authority they need to build authentic and supportive relationships with your customers is the not-so-secret to success. And this process starts with your company’s relationship with its agents. Here are some good ideas to start with:

- Give agents a complete history before the conversation begins—regardless of channel
- Provide continuous agent onboarding and coaching to strengthen more sophisticated interpersonal and problem-solving skills
- Recalibrate KPIs to reward agent time spent resolving complex cases on the first interaction
- Allow agents agency and authority to make real-time decisions that matter most to customers.

Supported by data transparency and immediacy, agents are becoming key players in the delivery of the highest impact personalized service in history.



## Giving agents wings

At Southwest, “Our people are our single greatest strength and most enduring long term competitive advantage,” Gary Kelly, CEO says on the [Southwest website](#). The company gives its employees agency to fully demonstrate empathy. In one example, a heartbreaking tragedy put a man’s two-year-old grandson on life support. As he traveled to the airport, his wife called a ticketing agent to book him on the next flight. He had a short window to say goodbye to his grandson for the last time. A long line at the checkpoint put him at the gate after the plane was due to take off. However, the ticketing agent his wife had arranged travel with was aware of the story and had already gotten ahold of the pilot who held the plane for the man who arrived in socks, out of breath and moved to tears by the personalized empathy the staff displayed.<sup>27</sup>



A close-up photograph of a man with a beard and glasses, smiling warmly while looking at his smartphone. He is wearing a light blue patterned shirt. The background is softly blurred, suggesting an indoor setting.

# Next-level tips to surprise and delight your customers

**Idea 10: Use voice options that make your customers feel heard**

**Idea 11: Remove the burden of contact forms**

**Idea 12: Make chatbots smarter**

**Idea 13: Personalize their experience at first search**

**Idea 14: Make digital interactions richer with video and media**



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## Idea 10: Use voice options that make your customers feel heard



Charlene Li  
Founder and Senior Fellow, Altimeter

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Though customers have increased their use of digital and self-service channels, voice is still a key communication channel—especially for handling the most complex interactions. Using digital technology to better personalize this channel is key.

“AI can detect not just the meaning behind natural language, but also analyze tone of voice to understand the customer’s emotional state. It all adds up to having the ability to pair them with the best rep who can resolve the issue, rather than starting with a generic response tree.”

Digital customers with digital expectations have no patience for repeating themselves or for clunky IVR routing. One way to make them feel heard is to power your [IVR with conversational AI](#) so that customers can speak in their natural language and get routed more effortlessly.

**Intelligent routing** enables routing not only based on the customer's specific need, but their sentiment and other interaction data, and can pair the customer with an agent most skilled at handling this type of interaction.

Tailored especially for customers calling on-the-go who might not have access to account information on hand, another common sense tactic for overcoming customer frustration and personalizing the experience is to use **voice authentication** to confirm the customer's identity and securely automate what could have been a cumbersome and lengthy alternative sequence of questions. Not only does this more quickly identify, but it also connects and surfaces the customer's data to the agent so the agent can build personalized rapport and access information they need to more quickly resolve the customer's issues.







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## Idea 11: Remove the burden of contact forms



Jo Boswell  
Founder, Sentio-B

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Boswell worked with an insurance company whose customers submitted online quotes. When their customers had questions or got confused about a particular aspect of the form, they'd call an agent for help. But the agent couldn't view the in-progress quote, so they had to start the form over again.

"There's nothing more infuriating for a customer," Boswell says.

Many firms are trying to service next-gen customers with a first-gen customer experience. Lengthy, cumbersome forms that do not save populated fields cause enormous frustration in our mobile-driven world. It's about a shift our contextual thinking. We are no longer "posting our forms on the web;" we are building easy-to-use digital user experiences.

Making this whole process considerably less painful while increasing submission rates doesn't have to be difficult. The [data is already available in the CRM](#). The customer's submission of their name, credentials or any other unique identifier should be enough to access their record and pre-fill areas of the form.

[Video co-browsing](#) can help streamline smart form completion, as well. When a customer runs into a snag, they can just click on a link to access a video chat session with co-browsing capabilities. The face of a friendly customer service agent can help you simplify the process personally and expedite completion of detailed administrative situations, such as insurance claims or lease applications, as well as high-margin, complex products/ services targeting VIP customers.

### Less frustrating form completion

A major European Energy Provider tripled online sales and dramatically improved customer experience through their use of smart contact forms that streamlined the submission process and prevented the need to repopulate in the event of technical glitches or an interruption in completion process.<sup>28</sup>





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## Idea 12: Make chatbots smarter



**Vit Horky**  
Senior Director of Digital Experience, NICE CXone

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Digital customers expect speed and quality on whatever channel, whenever they want. And a crucial way to meet those expectations is with a chatbot.

“Most of the chatbots out there remind me of the IVR technologies built in the '80s. ‘Press one to get your newest offerings, select nine to be connected with our rep,’” Horky says.

And other businesses would agree with him:

# 90%

of businesses believe chatbots and virtual agents need to get smarter before consumers are willing to use them regularly<sup>29</sup>

Clunky, cookie-cutter messaging that is devoid of human emotion can do more harm than good. Chatbot technology is evolving rapidly. The right chatbots can act as your personalization silver bullet. They automatically support customer queries and are a convenient, always-on self-service channel. The data they capture and record from customer interactions make it easier to collect and respond custom to each customer and can help personalize future interactions as well.

Smart chatbots with AI, natural language processing and robotic process automation can have two-way conversations with customers at scale and can:

- Answer frequently asked questions
- Escalate complex interactions to agents
- Listen, understand, and respond to customers in their language
- Proactively reach out to customers with personalized messages
- Complete transactions securely
- Complete forms and update customer information
- Surface product or content recommendations securely
- Collect and share customer data with agents in real time
- Connect and integrate within social and mobile messaging apps
- Schedule and make changes to appointments
- Provide assistance to agents

And the best part about an intelligent chatbot is that it can keep getting smarter and improve over time. Plus, chatbots are quicker to build and less expensive overall to host than mobile apps. Many enterprise contact center solutions are offering no-code DIY **“bot-builders”** that can generate chatbots quickly without the complex coding requirements and expense.

## Begin where your customers start—with search

An example of this kind of customer journey optimization might start with a Google search for “Should I be concerned if my dog is sleeping too much?” As a result of this Google search, your veterinarian would serve up the top search result with the necessary content. Once the customer gets to the veterinarian’s site, a 24-hour chatbot window pops up with an option to discuss condition details and treatment guidance for your dog. With the help of data analytics, we can meet customers wherever they are.



Interested in chatbots? Learn more in the Chatbot Starter’s Guide.

[\*\*Download now »\*\*](#)



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## Idea 13: Personalize their experience at first search



Charlene Li  
Founder and Senior Fellow, Altimeter

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Your customers could be searching for answers right now. And chances are they've turned to the web for help. Now you can personalize customer experience in real time—starting with your prospect's [very first Google search](#). [This next-gen technology](#) is accessible to companies of all sizes to help proactively personalize and meet the needs of customers across all channels with the power of AI.

“Piecing together disparate search keywords into a coherent picture is nearly impossible without AI. This advanced technology creates the opportunity to understand where your customers are in their journey from the very first moment they engage with you, regardless of channel.”

Monitor keywords and search queries to provide proactive service at the first point of inquiry. Seize every opportunity to convert prospective customers who may be looking for your product or service and continuously update your [knowledge base](#). You can even integrate data insights with conversational bots, so every customer or prospect can get a response to the simplest query or the most complicated issue in seconds. Capture, manage, deliver, and optimize content to enhance customer experience, increase agent productivity, streamline operational efficiencies, and reduce costs.

### **Airline uses search data for proactive personalization**

A customer of a major airline has trouble booking a special fare on the website and initiates a webchat with the company. The chatbot proactively responds to the first interaction with, “Are you contacting us about your flight to San Diego?” The customer is intrigued and delighted.





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## Idea 14: Make digital interactions richer with video and media



**Jeannie Walters**  
Founder and CEO, Experience Investigators

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With less preference for in-person, rich media and video offers a chance to deepen the digital conversations. Using content, pictures and video to initiate or support proactive engagements is one way contact centers can add clarity and personality to digital interactions.

Visuals and video can help manage and align expectations, avoid misunderstandings, and can help demonstrate empathy.

In the proper context, video chat can also help personalize customer interactions using agents trained to incorporate positive body language, eye contact, and facial expressions.

“We communicate better with body language, facial expressions, and simply seeing the other person directly,” Walters says. Some of her favorite ways to incorporate video is letting customers show their issue and get direction, personal stylists or designers providing personalized recommendations and how furniture retailers and other big-ticket sellers feel confident in their purchases. “Reassurance is crucial when helping a customer buy digitally,” she says.

For businesses traditionally offering face-to-face appointments, such as financial services, healthcare and real estate, video can offer a service alternative that brings the physical experience online.



**Digital  
personalization  
is human**



If these ideas have highlighted anything, it's that now is the time to get personal.

# 80%

of consumers say the experience a company provides is as important as its product or services<sup>30</sup>

The behavioral shifts we've seen aren't a flash in the pan. The reality of new customer behaviors has exposed just how many companies are falling short at delivering on expectations and the penalties they face when they get it wrong.

And for digitally focused consumers, personalization can't be single touch points where you address the customer by name. To build an emotional connection and create lasting customer relationships, personalization should be the fiber of your customer experience.

You should know the customer's needs so intimately that you can anticipate and proactively respond to them. And although this seems simple in theory, we recognize how difficult it might be to deliver. Transforming your people, systems, processes, and technology can feel overwhelming.

But the important part isn't where you are or how far your journey ahead might be—the important part is that you get started today.

There are no shortcuts, but the right technology can help make personalized, human connections easier. With a unified cloud contact center solution, you can deliver hyper-personalized experiences that reduce customer effort and enhance agent productivity, decrease costs and increase revenue simultaneously.

A unified cloud contact center can lighten the load, making your operational, workforce, data, journey integration and other challenges easier. With software pre-built to harness automation, AI and machine learning, you can support and scale hyper-personalized experiences customers expect.



## Begin your journey to reach the digital-first customer right now.

Together with NICE CXone, we can digitally transform your contact center. Watch a 20-minute video demo to see just how personally we take building relationships that last.

[Watch demo now »](#)

# Sources

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With NICE, it's never been easier for organizations of all sizes around the globe to create extraordinary customer experiences while meeting key business metrics. Featuring the world's #1 cloud native customer experience platform, CXone, we're a worldwide leader in AI-powered contact center software. Over 25,000 organizations in more than 150 countries, including over 85 of the Fortune 100 companies, partner with NICE to transform—and elevate—every customer interaction.



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