



Workshop 3: Contact Center Transformation

Supervisor Presentation

Participant Workbook

Trainer script as follows, beginning on slide 5:

Slide 5

Welcome!

As soon as you get settled, start answering these questions in your workbook. Then share your answers with those sitting near you.

When was the last time you had an **amazing customer experience?**

- Why did you contact the company?
- What channel(s) did you use to communicate with the company?
- How easy was it for you to get the information you needed?
- How long did it take?
- How did the experience make you feel?

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Preparation note:

[This slide should be displayed as people are arriving for the training.]

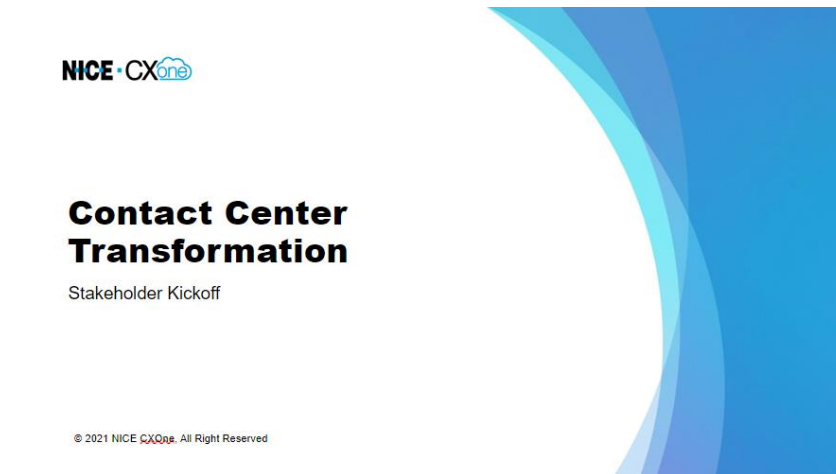
Script/speaking points:

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If you are presenting virtually: Be sure to turn on your camera. They can share their answers in chat.

If you are conducting the workshop in person: Be sure to circulate and encourage people to share their experiences with others in their table group or sitting nearby. Encourage the conversations.]

Slide 6



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Contact Center Transformation

Stakeholder Kickoff

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The slide features a blue and white abstract graphic on the right side.

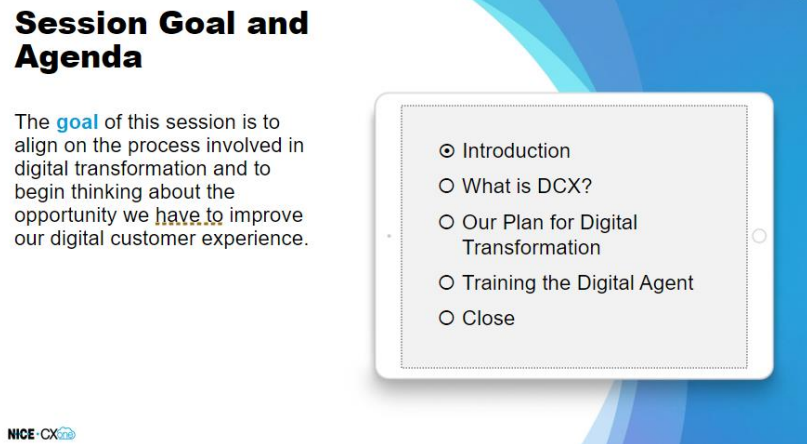
Script/speaking points:

[No script, transitional slide]

Slide 7

Session Goal and Agenda

The **goal** of this session is to align on the process involved in digital transformation and to begin thinking about the opportunity we **have to** improve our digital customer experience.

- 
- 4
- Introduction
 - What is DCX?
 - Our Plan for Digital Transformation
 - Training the Digital Agent
 - Close
- The slide features a blue and white abstract graphic on the right side and a tablet graphic containing the agenda list.

Script/speaking points:

In the next hour, we are going to do a high-level overview of what digital customer experiences (DCX) is all about. We want to align on what digital transformation means and begin thinking about how we can use this opportunity to improve our digital customer experience.

[Go over the session agenda as laid out on this slide, briefly indicating what we will be covering in the next hour.]

Slide 8

Amazing Customer Experiences



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Script/speaking points:

Debrief of Opening Exercise

[Note: There's not enough time to go around to each person and have them share their stories, so resist that temptation!]

Let's go back and revisit the stories of amazing customer experiences that you shared with each other. We are going to focus on how those experiences made you feel.

[Have people call out words describing how the amazing experiences made them feel, jotting these words on a flip chart or whiteboard (virtually – on a whiteboard slide).]

Isn't this exactly how you want your customers to feel when they interact with your organization? Of the three fundamental ingredients to a good digital customer experience (which we will go into shortly), Emotion is the most powerful and important. 92% of people who gave a high score for "emotion" said they were likely to purchase more from that company. *[Source: XM Institute]*

As we go through the content of this session, keep these emotions in mind and how you can help our customers have amazing digital experiences.

Script/speaking points:

Let's begin now with making sure we all have the same understanding of DCX.

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What is Digital Customer Experience?

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Slide 10

Digital Customer Experience

DCX is the sum total of all the online interactions a customer has with your brand.



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Sample channels:

- Your website
- Live chat and email
- Mobile apps
- Social media channels (Facebook, Twitter, Instagram, etc.)
- Text messages/SMS
- Digital kiosks and Internet-of-Things (IoT) hardware
- Desktop and Software-as-a-Service software
- Self-service

Script/speaking points:

The definition of DCX is really quite simple – the sum total of all the online interactions a customer has with our brand. This may start with our company website but might also include mobile apps, chat, email, social media, text messaging, and any other channels where the customer touchpoint is virtual.

Slide 11

DCX and CX



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Script/speaking points:

If you are wondering how digital customer experience fits with customer experience, envision them as two nesting dolls. DCX is the slightly smaller doll that fits within the larger doll of CX which includes all of our customer touchpoints, including store and other interactions in the physical world. DCX includes all of the elements important to a good CX journey (empathy, human connection, trust, etc.), but in their online expressions.

It is important to remember that while we might differentiate between CX and DCX, customers don't think in these terms. For them, whether the interaction is physical or virtual, offline or online, it is all the same to them. It's all one experience with your brand.

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Fundamental Ingredients to Good DCX



Did the customer complete their task and achieve their goal?

Was the process smooth and easy?

Did they come away from the interaction feeling good?

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Script/speaking points:

As referenced early, there are three fundamental ingredients to good digital customer experiences: Success, Effort, and Emotion. Obviously the first two impact the third. And which is most important? <pause> #3 – Emotion. Emotion has a far bigger affect on whether the customer will continue doing business with our company, but it is often the thing we pay least attention to. It's a little harder to measure than success and effort, but it's far more influential.

Digital customer experience management focuses on being aware of the digital touchpoints we share with our customers

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Why Emotion Matters

67%

Will pay more for a great experience



Customers who have an emotional connection with a brand:

304% Higher lifetime value

71% More likely to recommend our brand

Source: Sitecore

Slide 14

across platforms and continually improving the experience our customers have within and in-between those touchpoints.

Script/speaking points:

Experiences that spark powerful emotions shape buying patterns and brand loyalty, as seen in these statistics. As the move toward an all-digital world accelerates, the majority of customer experiences will be delivered through online channels, where it's more difficult to gauge sentiment and interpret reactions.

Script/speaking points:

And here are a few stats to support why digital matters. Even in-store, multi-channel customers spent 4% more than single-channel customers. For every additional channel they use, customers spend more money.

To stay ahead of the curve and reap the rewards, we will need a deliberate strategy for measuring and improving digital customer experiences.

The perception of customer service is quickly changing. While they were once viewed as a cost center, contact centers are increasingly

Why Digital Matters

56%

Of CEOs said digital improvements led to revenue growth

10%

Greater online spend for multi-channel customers

Source: Delighted Team



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being seen as a value-add for those brands that invest in a digital strategy and staff to empower every employee to deliver consistently satisfying service and information across channels.

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What Do You Think?

Thinking back on the amazing customer experience that you noted at the beginning of the session and what we have discussed about digital customer experiences:

What do you think the **3 biggest improvement opportunities** are for our customer experience?

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Script/speaking points:

[Have each participant first write down a few improvement areas in the workbook, and then ask them to share with the entire group. Make a list of the biggest improvement areas on a flipchart or whiteboard or virtual whiteboard.]

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Script/speaking points:

Now, let's look at ingredients for creating an effective strategy for DCX.

Our Plan for Digital Transformation

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Steps for an Effective Digital Transformation

1. Prepare for change
2. Build a coalition and establish partnerships
3. Align technology to transformation goals
4. Establish and implement change plans
5. Measure and improve

Script/speaking points:

Here are the steps we are going to take in completing this digital transformation.

[As you go through the steps in the next few slides, expand the content to include your specific plans and strategy for completing the contact center digital transformation.]

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Slide 19

Script/speaking points:

Our digital strategy does not exist in isolation but needs to be aligned with our organization’s overall mission, vision, and strategy. If it does not, we will not be able to get the support and funding needed to transform the customer experience to digital, which will likely lead to an erosion of our customer base. Be crystal clear on how a digital strategy supports the overall organization.

Defining the vision also means that we define the vision of what the digital transformation means for us as an organization, our readiness and commitment to take on the change, and the impact we expect the change to have on the organization.

Taking an honest look at where your company stands, and how capable or ready you are for your initiative can help you plan appropriately for the endurance it might require.

This is a good place for the contact center leader to speak to the vision for transformation.

Script/speaking points:

These are the five areas we need to cover in assessing maturity. Let’s take a look at each one.

[next slides]

To assess maturity

Reflect on our current state and the key changes needed in each of the following areas:

- Customers
- Employees
- Operations
- Data
- Technology

Slide 20



Slide 21

Script/speaking points:

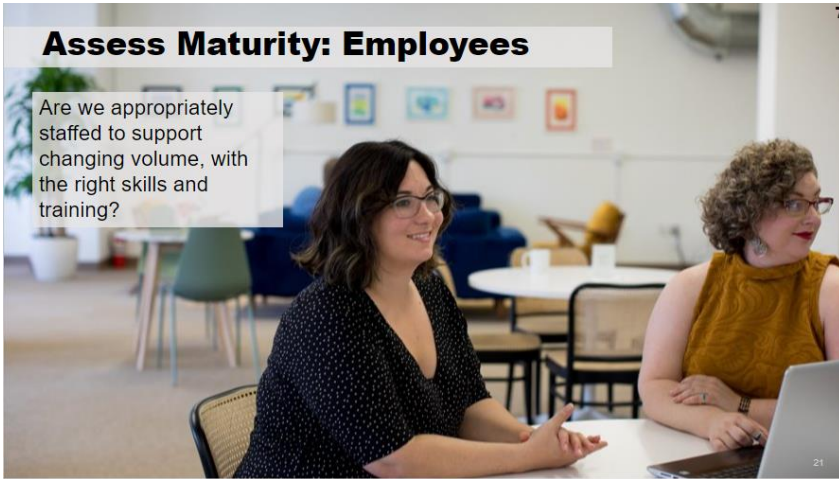
Discuss the question on the slide – Share your assessment and ask for input from the participants.

Script/speaking points:

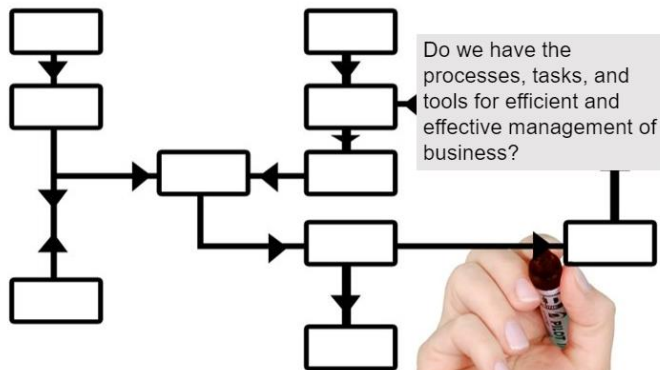
[Discuss the question on the slide – Share your assessment and ask for input from the participants.]

Assess Maturity: Employees

Are we appropriately staffed to support changing volume, with the right skills and training?



Slide 22

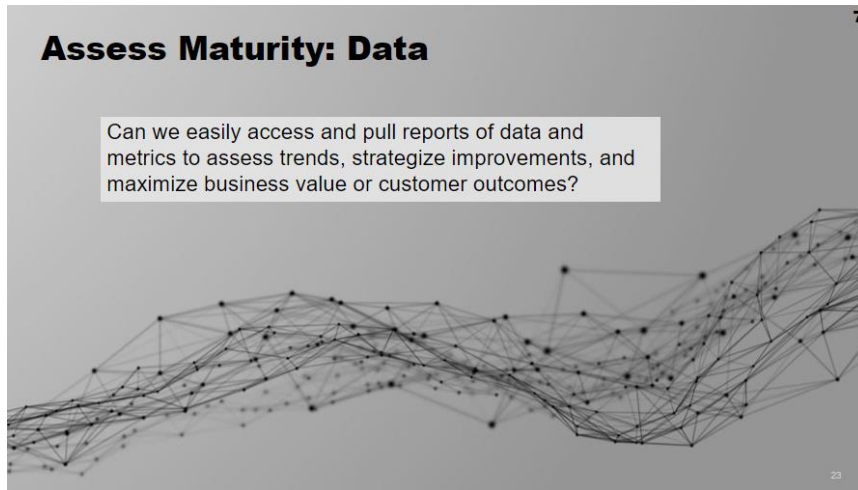


Assess Maturity: Operations

Script/speaking points:

[Discuss the question on the slide – Share your assessment and ask for input from the participants.]

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Assess Maturity: Data

Can we easily access and pull reports of data and metrics to assess trends, strategize improvements, and maximize business value or customer outcomes?

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Script/speaking points:

[Discuss the question on the slide – Share your assessment and ask for input from the participants.]

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Assess Maturity: Technology

Do we have the right stack of technology and integrations that support seamless customer and employee experience, operational and data requirements?

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Script/speaking points:

[Discuss the question on the slide – Share your assessment and ask for input from the participants.]

Slide 25

Nudge Your Neighbor

Take 30 seconds to tell someone near you how ready you think our organization is for digital transformation and why you think that.



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Script/speaking points:

Activity

[If presenting in person, just have people pair up with someone near them and quickly answer the question.]

[If presenting virtually, have people respond in chat. You should acknowledge what people have written but do not do a lot of commenting.]

[This should be a short 30-60 seconds pause for participants to reflect for a moment before going on.]

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2. Build a Coalition and Establish Partnerships

- Executive sponsors
- The role of stakeholders
- Partnership with IT



Script/speaking points:

[Explain the role of a digital transformation coalition and the importance of partnerships.]

Who should be a participant: Transformation will affect some individuals more than others, and the committed participation of these key people will have more of an effect on the outcome. The leaders responsible for various parts of the customer journey and IT are critical partners to include,

Why it's important to gain stakeholder alignment: The Contact Center is no longer a touchpoint on the customer journey—it's the hub of customer experience. Accordingly, any transformation to the contact center is risk and impact that






will echo throughout the full business, organization-wide and top-to-bottom deep.

Transformation in the contact center can only be accomplished through the efforts of stakeholders throughout the organization. The stakeholders must be moving in the same direction, guided by shared vision and strategy. Awareness, acceptance, and advocacy need to flow from the top of the organization to the front-line agents to accomplish success.

How to ensure alignment: For contact center leaders facing change initiatives, customer outcomes will act as a compass that keeps every department in our company aligned on the same goal. Often, the ‘why’ is the heart of our customer experience strategy—or the best possible end-to-end customer journey for our company.

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3. Align Technology to Transformation Goals

-  • Adopt a cloud infrastructure
-  • Implement a cybersecurity strategy
-  • Use an omnichannel platform
-  • Self-service
-  • Artificial intelligence and machine learning

Script/speaking points:

All of the research on going digital indicates that it is important to make a wise choice in flexible, secure technology infrastructure and to implement these early in the process as they provide a strong backbone for all of your other activity.

- Adopt a cloud infrastructure so that your system is available whether people are working in the office or remotely from home or customers are doing self-serve from a mobile app or your website.
- Implement a cybersecurity strategy to make sure customer data is secure, to protect customer privacy, and to protect your own organization’s data.

- Use an omnichannel platform (such as NICE's CXone) to help support a consistent DCX across channels.
- Implement self-service into different channels, such as websites and mobile apps. Customers prefer to help themselves in many situations and it provides for cost savings and productivity gains.
- Enhance existing applications and processes with artificial intelligence and machine learning. *Gartner's 2019 Strategic Roadmap for Customer Service and Support Technologies* indicated that those organizations who embed AI in their customer engagement platforms will elevate operation efficiency by 25%, making this a good area for technology investments.

Slide 28



The Importance of Omnichannel

Assess your current channels:

- Do they all provide an engaging experience for customers?
- Are there channels that customers prefer that are not being offered?
- Are there channels that customers are not using?

Script/speaking points:

An important part of the DCX for customers is being able to work across any channel they choose and being able to switch channels when working on an issue. This means, that we need to move from multi-channel where each channel is worked independently to omnichannel where we can help customers in different channels and are able to see a consolidated history of what they have done – no matter the channel.

NICE's CXone platform is an example of an omnichannel customer service platform. The My Agent Experience, or MAX, element of CXone enables agents to deal with different channels and to move between channels with the customers as needed, as well as deal with their own scheduling and coaching needs – all through one platform. You can also



integrate into your well-established CRM to make it the center of your omnichannel world.

[CLICK] Before moving into omnichannel, however, we need to assess the channels we currently provide. Here are a few questions that can get us started on assessing the current state of our existing channels.

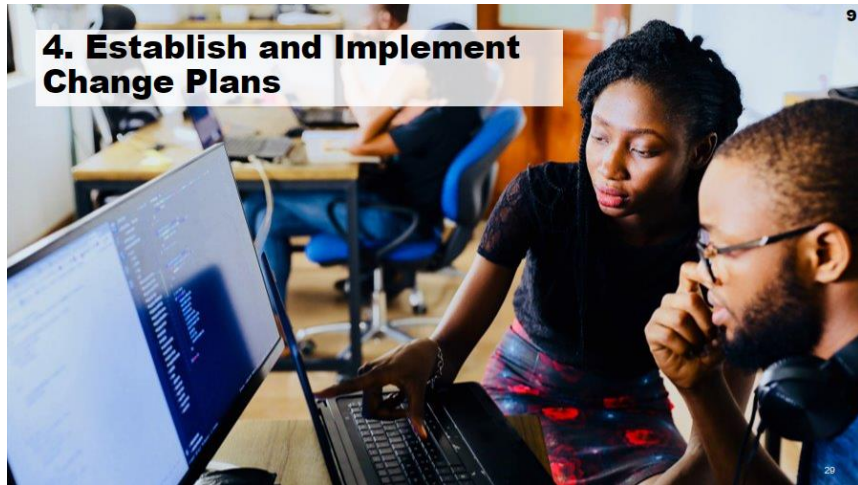
Please note that even if there are channels the customers would prefer but which are not being currently offered, further assessment is needed. Are the customers requesting the channel our core audience? Will the new channel give us access to a new audience that will help us grow? Is the channel worth the time and costs to roll out and manage?

Whether customers are using traditional or digital channels, we have to consider them when devising our digital strategy, and we have to build omnichannel into this strategy. And if there are issues with an existing channel, better to fix these first before moving on.

Slide 29

Script/speaking points:

Transparent communication and training for change are vital ingredients.



Slide 30



Script/speaking points:

Obviously, measuring the effectiveness of our digital transformation is critical. How will we know that we have improved DCX? How will we know what we need to change to be more effective with our DCX? By measuring our efforts.

Track metrics such as:

- How long it takes for customers to resolve their issues
- The volume of calls to customer support
- How many users log onto each of the digital channels provided
- Cost-savings from adding digital channels

Additionally, reach out to customers to rate or review their experience. Make sure to incorporate a regular assessment of

Slide 31

Nudge Your Neighbor

Take 30 seconds to tell someone near you one important consideration that you see for your organization in measuring the success of your digital transformation.



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Slide 32

tactics and channels to implement improvements and build out an experience that will actually be beneficial for customers.

Script/speaking points:

Activity

[If presenting in person, just have people pair up with someone near them and quickly answer the question.]

[If presenting virtually, have people respond in chat. You should acknowledge what people have written but do not do a lot of commenting.]

[This should be a short 30-60 seconds pause for participants to reflect for a moment before going on.]

Script/speaking points:

[No script, transitional slide]

Training the Digital Agent

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Important Elements to Customers

- Fast and easy resolutions
- Finding answers at any time
- Interacting with a friendly and empathetic person
- Getting help by my chosen channel
- Not having to repeat myself



Script/speaking points:

Various surveys of thousands of digital companies and digital customers have found that these four items are most important to customers and thereby, the most important to DCX.

- **Fast and easy resolutions:** As the world has undergone a digital transformation, the demand for quick (and accurate) answers has risen. Customers want to get a response quickly and to resolve their issues with a minimum of effort.
- **Finding answers at any time:** This means 24/7 access to the organization in order to find the answers the customer's needs.
- **Interacting with a friendly and empathetic person:** Customers want speed and convenience, but they also look for empathy and commitment to the

issues that they care about. Surveys have shown that customers will spend more with a company that is empathetic and understanding. It may be digital, but the human touch still counts.

- **Getting help by my chosen channel:** Customers want help where they are most comfortable at the moment, whatever that channel might be.
- **Not having to repeat myself:** It gets frustrating when customers have to repeat their verification elements or their account number again and again or explain themselves all over again because they are dealing with another agent, or someone wasn't paying attention.

Any training for digital agents needs to be built around these elements.

With these elements in mind, what are the top skills digital agents need?

[See next slide.]

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Script/speaking points:

Besides technical skills, these are the five top skills that agents need to improve your digital customer experience:

- **Empathy:** Emotions can be harder to identify in written communication and can be different than in person or spoken channels. Digital agents should always assume good intent from the customer, no matter how they express themselves, and show customers empathy.



- **Speed:** Fast reply time is correlated with higher customer satisfaction, so digital customer service agents need to have a sense of urgency in everything they do.
- **Attentiveness:** When juggling multiple contacts at once (such as multiple chats, emails, or even multiple channels), agents need to have good attention to detail, reading carefully to fully understand the customer's issue, asking good questions where needed, and identifying how to help.
- **Written communication:** Most of the digital channels involve the written word, so digital agents need to have strong writing skills across different channels. This means summarizing issues clearly and concisely, and clearly providing answers.
- **Social skills:** Personality takes more effort to shine through on digital channels. Adding emojis, gifs, or friendly banter can elevate the DCX and make it more enjoyable for both the agent and the customer.

Slide 35

Script/speaking points:

Here are a few things to consider when it comes to onboarding new digital customer service agents

- **Know what you want to accomplish:** How will agents be measured? What does the organization need agents to do? Be clear on the metrics, the quality measurements, and how their actions directly relate to the organization's mission, vision, and objectives. These are the things that need to be supported in onboarding.

Onboarding New DCX Agents

- Know what you want to accomplish
- Teach them to work across channels
- Teach digital media etiquette
- Provide knowledge and resources
- Create a feedback mechanism

- **Teach them to work across channels:** If you limit agents to only one or two channels, you are right back to multi-channel rather than omnichannel, which is critical to an effective digital strategy. Train new agents so they can follow customers across channels whenever necessary. This way they can meet customer needs and help out wherever the need is greatest.
- **Teach digital media etiquette:** Digital channels have their own rules, so help your agents learn the nuances, such as the meaning and usage of popular emojis and acronyms.
- **Provide knowledge and resources:** Give them hands-on experience and shadowing time with software tools so they get hands-on experience. And have a solid knowledge management system. Remember that agents need streamlined tools that allow them to get their jobs done without added complexity. You want agents spending their time helping customers rather than toggling between different tools. Tools such as NICE's CXone make it much easier on agents, who are doing a complicated job already.
- **Create a feedback mechanism:** New hires need more feedback than seasoned agents, so make sure and allow for that. Give them feedback right from the beginning and take advantage of customer feedback to provide specific examples and opportunities for improvement.

What other recommendations would you make for onboarding new digital agents?

Slide 36

Nudge Your Neighbor

Take 30 seconds to tell someone near you one thing you most want to remember about onboarding and training new digital customer service agents.

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Script/speaking points:

Activity

[If presenting in person, just have people pair up with someone near them and quickly answer the question.]

[If presenting virtually, have people respond in chat. You should acknowledge what people have written but do not do a lot of commenting.]

[This should be a short 30-60 seconds pause for participants to reflect for a moment before going on.]

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Script/speaking points:

[No script, transitional slide]

Close

Slide 38

What is Digital Customer Experience?

DCX is the sum total of all the online interactions a customer has with your brand.



Fundamental Ingredients to Good DCX



Did the customer complete their task and achieve their goal?

Was the process smooth and easy?

Did they come away from the interaction feeling good?

Why Emotion Matters



Why Digital Matters



Script/speaking points:

Here are a few things we covered at the beginning of this session. What do you want to remember the most about what is digital customer experience?

[Just have participants call out a couple of things.]

Slide 39

Our Digital Plans

To assess maturity

Reflect on our current state and the key changes following areas:

- Customers
- Employees
- Operations
- Data
- Technology

Steps for an Effective Digital Transformation

1. Prepare for change
2. Build coalition and establish partnerships
3. Align technology to transformation goals
4. Establish and implement change plans
5. Measure and improve

The Importance of Omnichannel

Script/speaking points:

Here are a few things we covered in the section on our digital plans. What is something you most want to remember about digital strategies?

[Just have participants call out a couple of things.]

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Training the Digital Agent

Important Elements to Customers

- Fast and easy resolutions
- Finding answers at any time
- Interacting with a friendly and empathetic person
- Getting help by my chosen channel

Top Skills for DCX

- Empathy
- Speed
- Attentiveness
- Written communication
- Social skills

Onboarding new DCX agents

- Know what you want to accomplish
- Teach them to work across channels
- Teach digital media etiquette
- Provide knowledge and resources
- Create a feedback mechanism

Script/speaking points:

Here are a few things we covered in the last section of the session. What do you want to remember the most about training digital agents?

[Just have participants call out a couple of things.]

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Help us understand

- Given all focus areas and priorities, with 1 being – “high priority we need to change to survive” and 5 being “I support it, but I don’t think we’re ready yet” – how important is digital customer experience to you?
- Why is evaluating and making a change to the customer experience important to you?
- What are the three critical goals and/or metrics you care about?
- What is your biggest challenge we should be solving for or that we should keep in mind as we transform?
- Where do you see the biggest impact that we need to account for (impacted teams, process changes, areas of potential resistance, etc.)?

Script/speaking points:

To ensure our transformation accounts for your needs, help us understand the following from your perspective.

[Either discuss each question with the group now or administer a survey (distributed electronically after the session or on paper now). However you decide to get this information, it is an important part of getting stakeholder buy in and getting important information to consider in your transformation efforts.]

Transform your workforce

Watch how CXone empowers agents in this video demo.

[Watch now >](#)