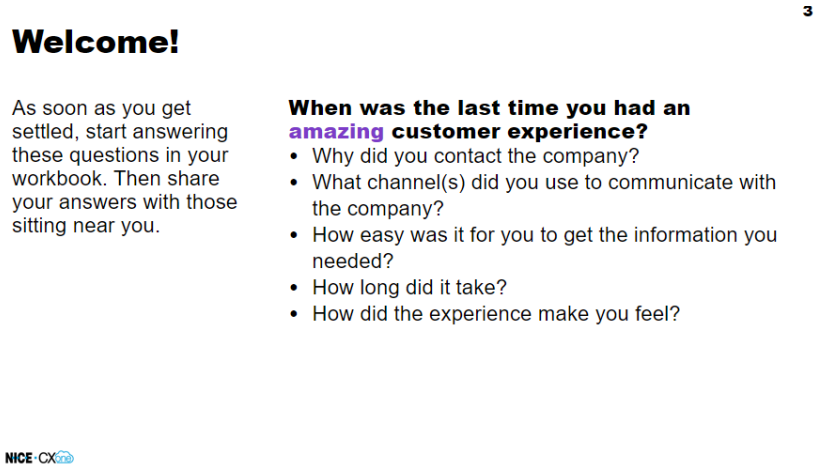
Workshop 3: Contact Center Transformation

Supervisor Presentation

Participant Workbook

Trainer script as follows, beginning on slide 5:

Slide 5



Script/speaking points:

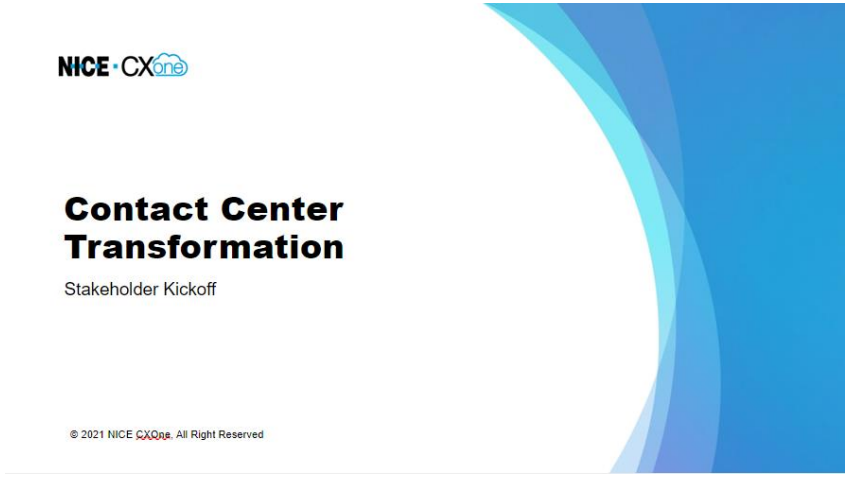
If you are presenting virtually: *Be sure to turn on your camera. They can share their answers in chat.*

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.]*

Preparation note:

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

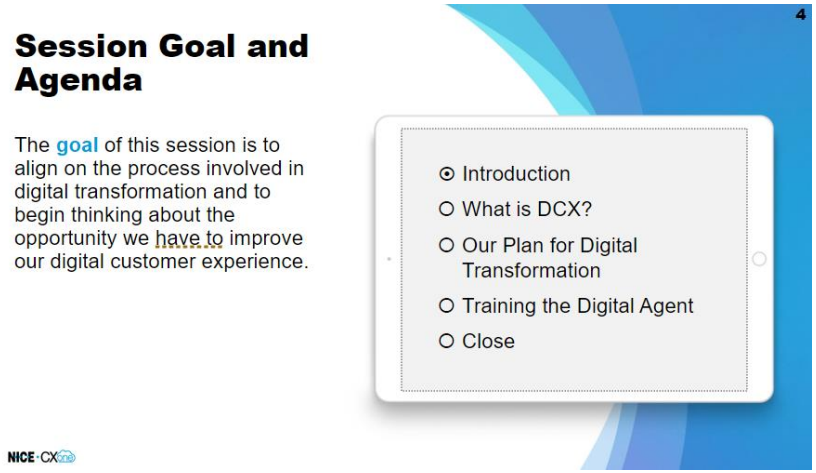
Slide 6



Script/speaking points:

[No script, transitional slide]

Slide 7

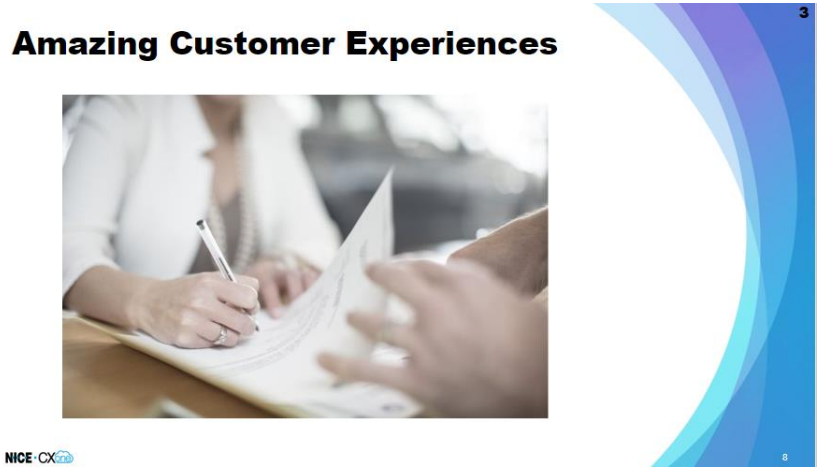


Script/speaking points:

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



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]*

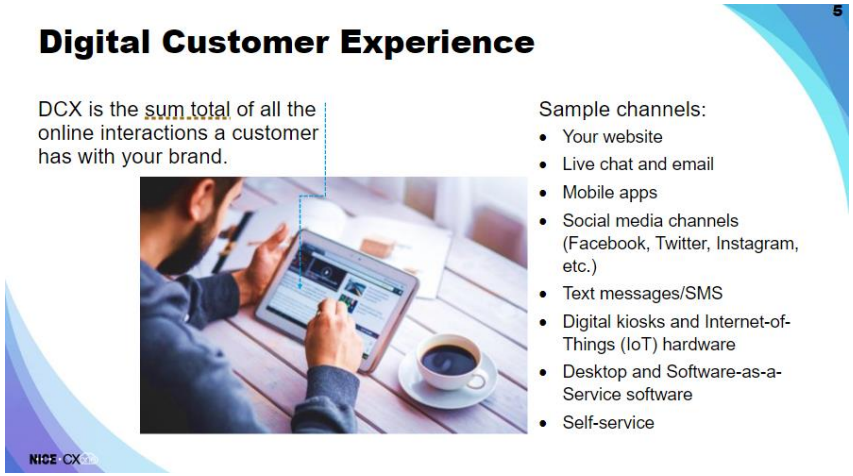
As we go through the content of this session, keep these emotions in mind and how you can help our customers have amazing digital experiences.

Slide 9

Script/speaking points:

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

Slide 10



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.

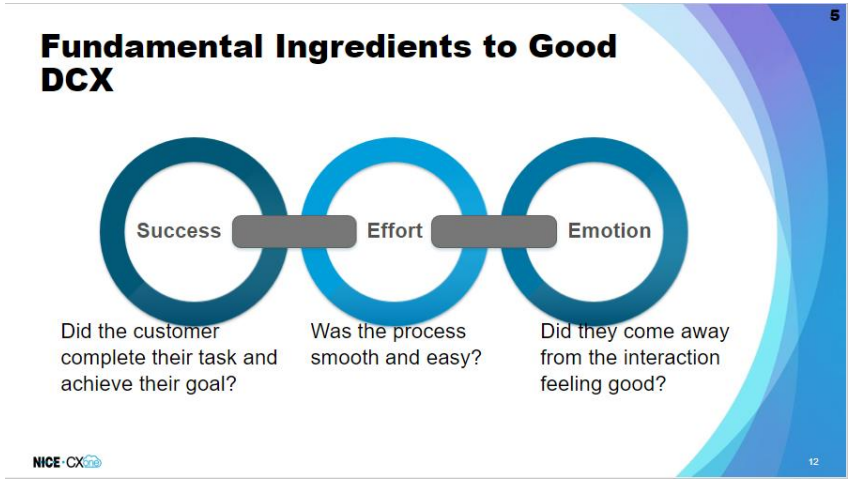
Slide 11

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.

Slide 12



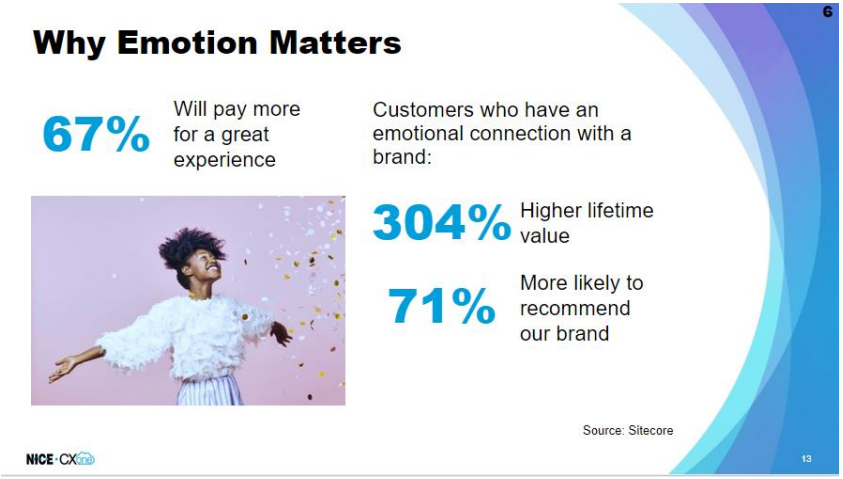
Script/speaking points:

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

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

Slide 13



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.

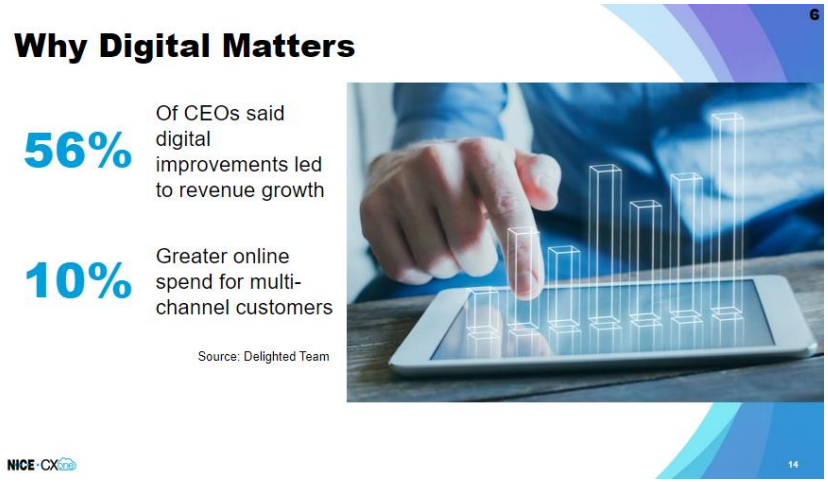
Slide 14

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.

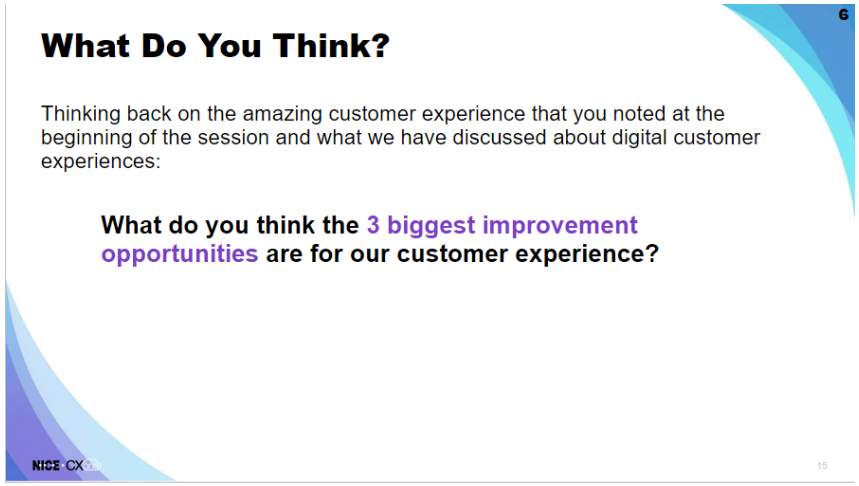
To stay ahead of the curve and reap the rewards, we will need a deliberate strategy for measuring and improving digital customer experiences.

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



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.

Slide 15



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.]

Slide 16

Script/speaking points:

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

Slide 17

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.]

Slide 18

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.

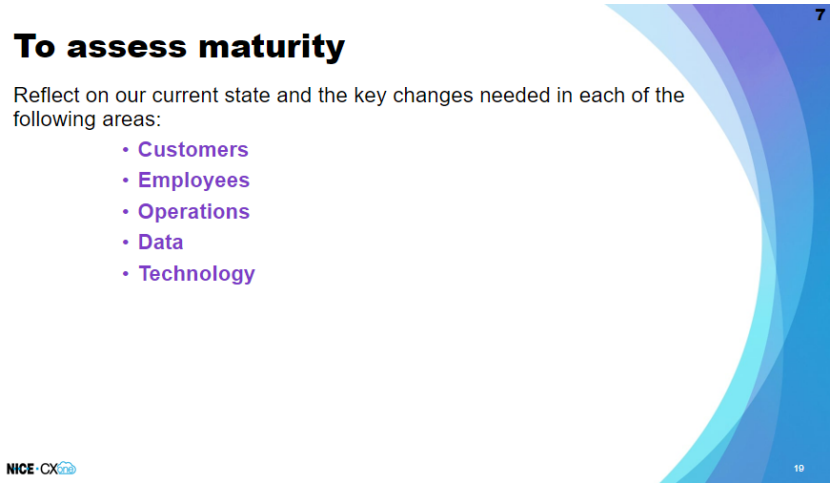
This is a good place for the contact center leader to speak to the vision for transformation.

Slide 19

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]



Slide 20

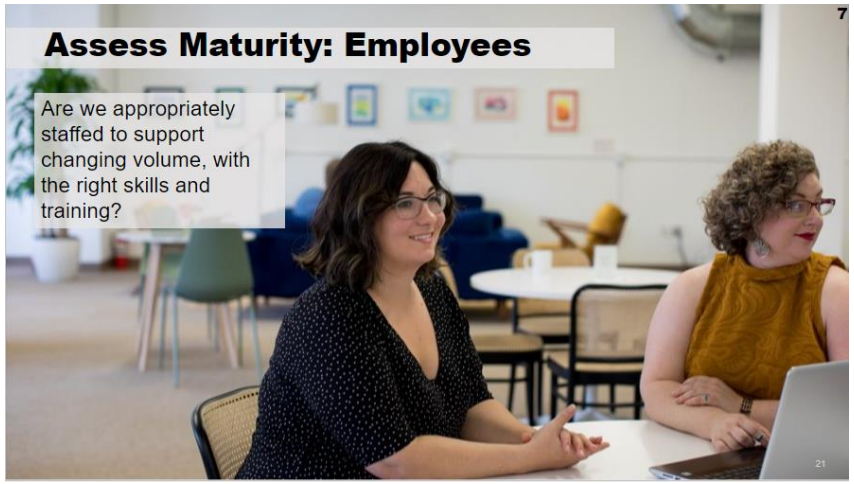
Script/speaking points:

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

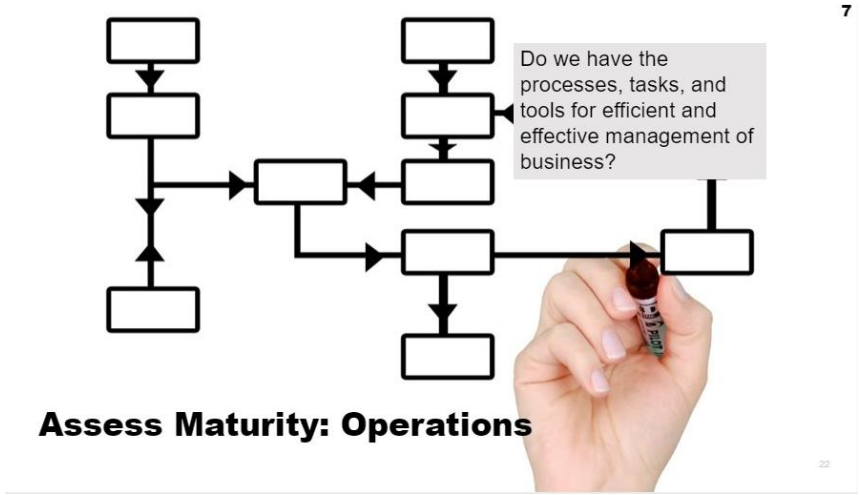
Slide 21

Script/speaking points:

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



Slide 22



Script/speaking points:

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

Slide 23

Script/speaking points:

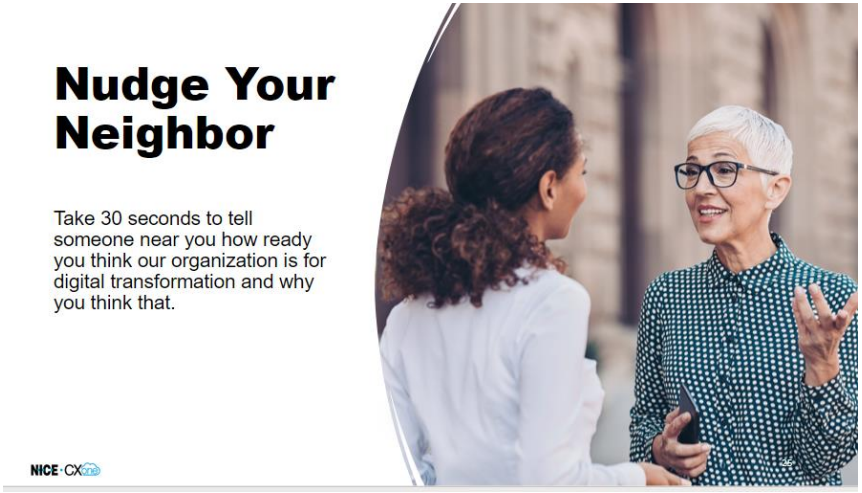
[Discuss the question on the slide – Share your assessment and ask for input from the participants.]

Slide 24

Script/speaking points:

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

Slide 25



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.]

Slide 26

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,

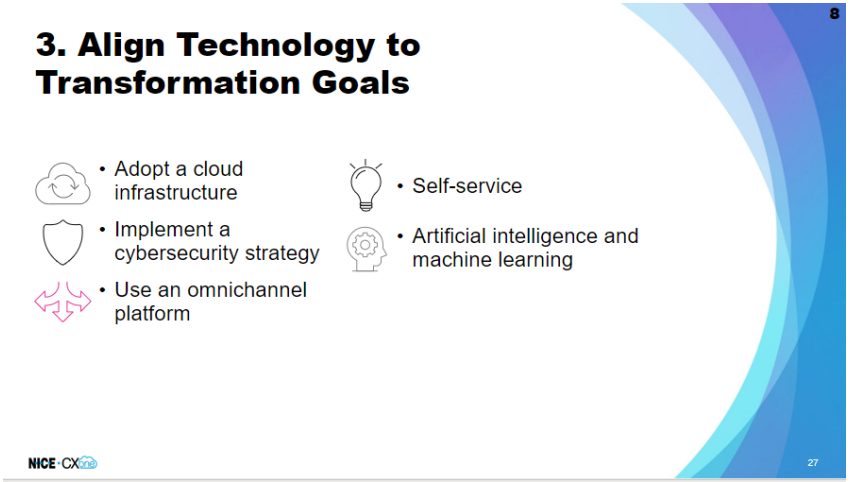
Why it's important to gain stakeholder alignment: The Contact Center is no longer a touchpoint on the customer journey—it's the hub of customer experience. Accordingly, any transformation to the contact center is risk and impact that

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.

Slide 27



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

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

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

Slide 31

Script/speaking points:

Activity

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Slide 32

Script/speaking points:

[No script, transitional slide]

Slide 33

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.]

Slide 34

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:

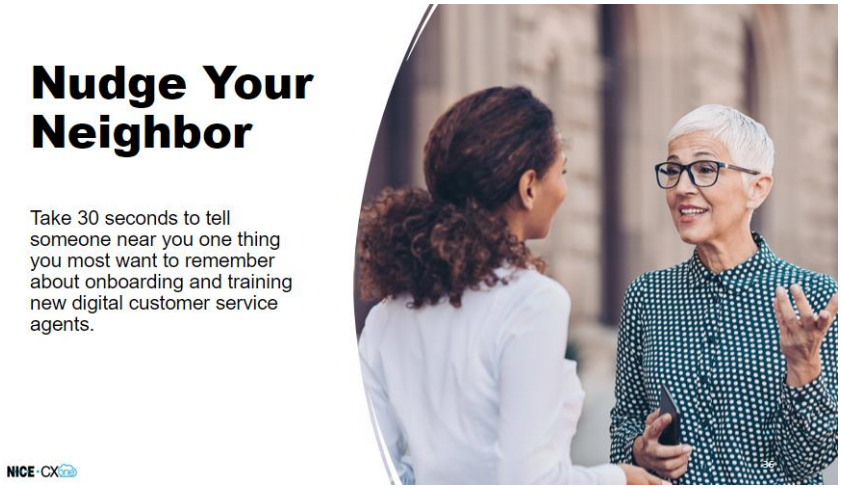
Here are a few things to consider when it comes to onboarding new digital customer service agents

- **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.

- **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



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Slide 37

Script/speaking points:

[No script, transitional slide]

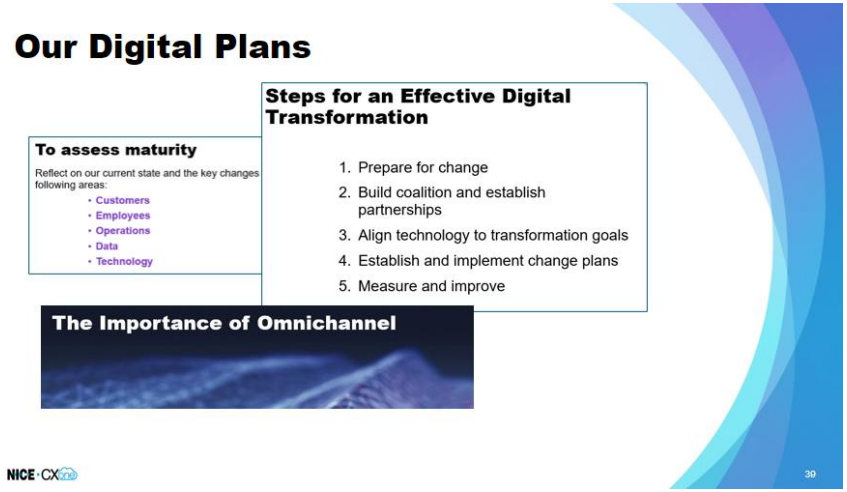
Slide 38

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

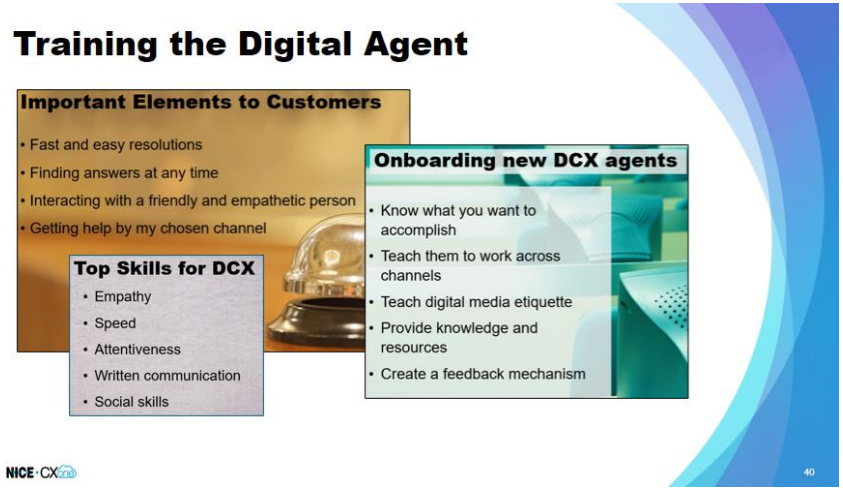


Script/speaking points:

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.]

Slide 40

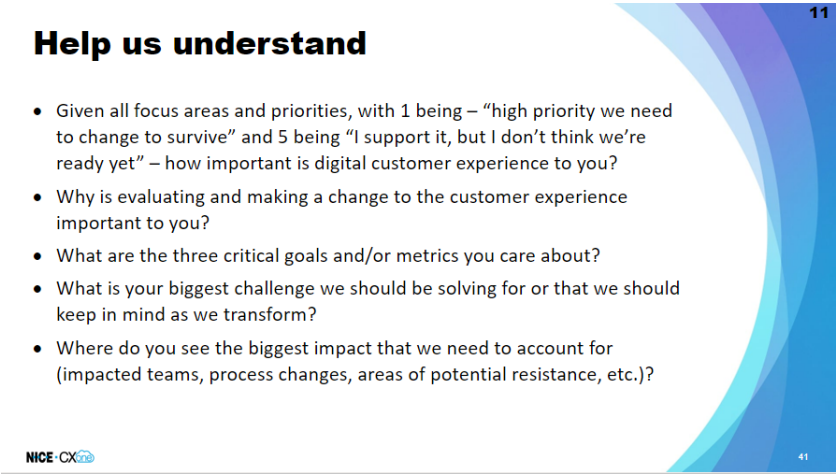


Script/speaking points:

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.]

Slide 41



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 >