



Workshop 4: Creating Digital CX

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:

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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Creating Digital Customer Experiences

A Workshop

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Script/speaking points:

[No script, transitional slide]

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Course Goal and Agenda

The **goal** of this course is to take a high-level look at what digital customer experiences are all about and to identify elements to evaluate existing digital experiences or roll out new digital experiences.

- ⦿ Introduction
- What is DCX?
- Effective Digital Strategies
- Training the Digital Agent
- Close

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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. If you already have implemented digital, then this will help you evaluate your existing DCX, and if you are only now (or recently) implementing digital, then this will help you identify a few elements that you need to consider as you continue on this journey.

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

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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 workshop, keep these emotions in mind and how you can help your 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

Script/speaking points:

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

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DCX and CX



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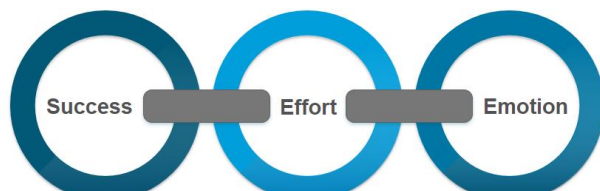
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Script/speaking points:

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 your 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.) are also important to DCX, but in their online expressions.

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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 effect on whether the customer will continue doing business with your 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.

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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 your brand

Source: Sitecore

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.

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Why Digital Matters

56% Of CEOs said digital improvements led to revenue growth

10% Greater online spend for multi-channel customers

Source: Delighted Team



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, you 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

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Nudge Your Neighbor

Take 30 seconds to tell someone near you one thing you want to remember about digital customer experiences.

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employee to deliver consistently satisfying service and information across channels.

Script/speaking points:

Activity

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

If training 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:

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

Effective Digital Strategies

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Ingredients for an Effective Digital Strategy

1. Align with the overall vision and strategy for the organization
2. Understand current customer journeys
3. Implement the necessary technology
4. Train and support all staff
5. Measure success

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Script/speaking points:

While a full digital strategy can be quite complex, here are five ingredients that are critical. We are going to go through all four of them.

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Script/speaking points:

Your digital strategy does not exist in isolation but needs to be aligned with your organization’s overall mission, vision, and strategy. If it does not, you 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 your customer base. Be crystal clear on how a digital strategy supports the overall organization.

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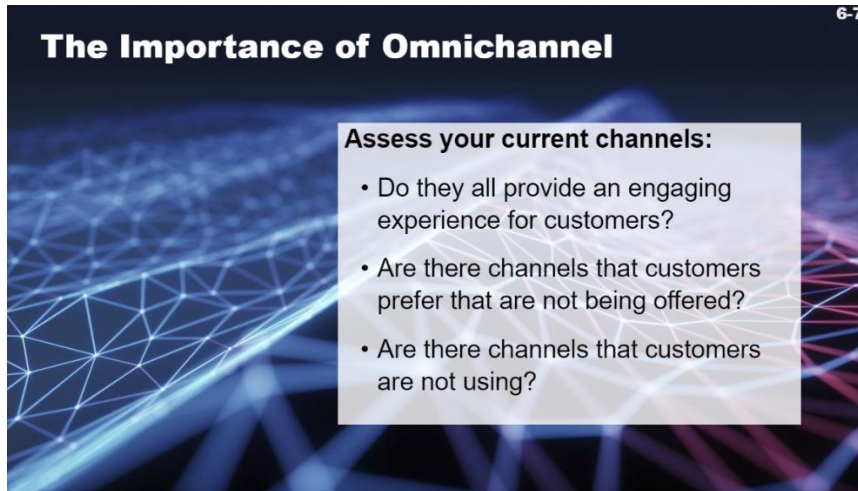
2. Understand Current Customer Journeys

- What channels are currently provided to customers, traditional and digital? Which of these are most popular?
- Where are the points of conflict during a typical customer journey when a customer will reach out for help? Remember to consider the entire journey, from first-touch, to purchase, and afterwards.
- Is it possible to streamline this journey? What malfunctioning can you correct now?
- Are there commonly asked questions or processes that customer service teams spend a lot of time answering?



Script/speaking points:

Having an in-depth understanding of your current customer journeys can help you make smart decisions when it comes to implementing or improving the digital customer service. Here are some questions you can ask to understand the typical customer journey.



The Importance of Omnichannel

6-7

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

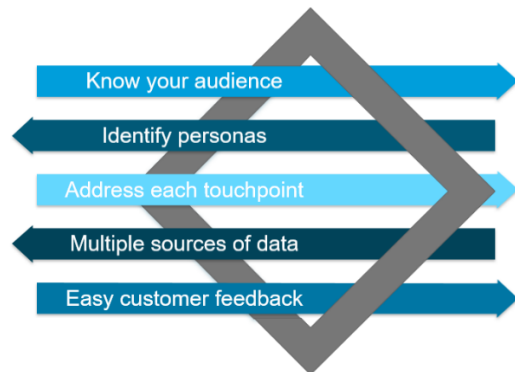
NICE's CXone platform is an example of an omnichannel customer service platform. The My Agent Experience, or MAX, element of CXone enables agents to deal with different channels and to move between channels with the customers as needed, as well as deal with their own scheduling and coaching needs – all 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, assess the channels you currently provide. Here are a few questions that can get you started on assessing the current state of your 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 your core audience? Will the new channel give you access to a new audience that will help you grow? Is the channel worth the time and costs to roll out and manage?

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Customer Journeys



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

Script/speaking points:

When mapping out your customer journeys, here are some things to consider.

1. Know your audience.

- Make sure that you are capturing feedback from the right audience – the customers you are trying to reach.
- If some customers have interacted with you in multiple channels, look for persistent pain points across their experiences. They can have a lot to tell you about how well the omnichannel experience fits together.

2. Identify personas

- Devise typical customer profiles
- How does each persona experience the journey differently?
- How does each persona experience the journey the same?

3. Address each touchpoint

- Touchpoints are the building blocks of a great digital experience.

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Nudge Your Neighbor

Take 30 seconds to tell someone near you one important consideration that you see for your organization in understanding your existing customer journeys.

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- Focus on the high-stakes touchpoints – those places in the journey where your customers might leave without resolution – to see where your customers are enjoying the experience or getting stuck.
 - Have you identified each touchpoint for each persona?
 - Add in relevant content and experiences at each touchpoint.
4. **Use multiple sources of data**
 - Incorporate both experiential data (such as customer satisfaction data) and operational data to get a full picture of the customer experience.
 5. **Provide a means for easy customer feedback**
 - Customers should be able to provide feedback in a place and via a channel that they prefer and that takes minimum effort.
 - Meet them where they are.

Script/speaking points:

Activity

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3. Implement the necessary technology



- Adopt a cloud infrastructure



- Implement a cybersecurity strategy



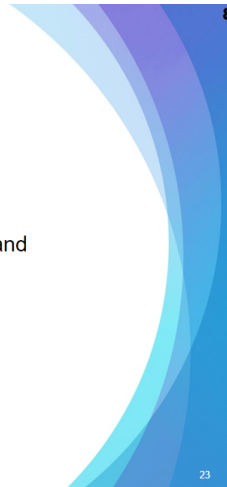
- Use an omnichannel platform



- 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.

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Nudge Your Neighbor

Take 30 seconds to tell someone near you one important consideration that you see for your organization in implementing the necessary technology.



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Script/speaking points:

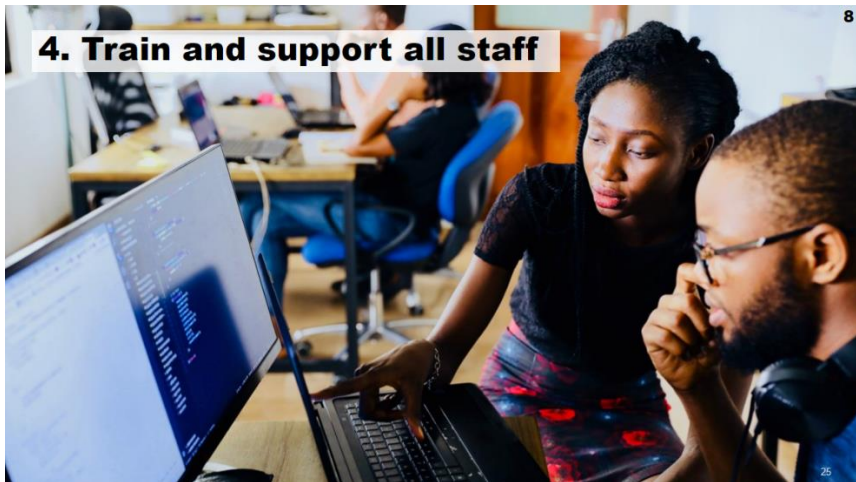
Activity

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

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4. Train and support all staff

Script/speaking points:

We are going to talk about training digital customer service agents, but digital customer experience is not just about the contact center. All employees who are supporting customers in any manner – even indirectly – need to be trained and supported on the digital transformation happening within your organization. Make this a part of your digital strategy.

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Script/speaking points:

Obviously, measuring the effectiveness of your digital strategy is critical. How will you know that you have improved DCX? How will you know what you need to change to be more effective with your DCX? By measuring your 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.

Script/speaking points:

Activity

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

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 DCX.

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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]

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Script/speaking points:

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



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.

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]



Script/speaking points:

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

- **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.
- **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.

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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 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?

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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.



Script/speaking points:

Activity

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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:

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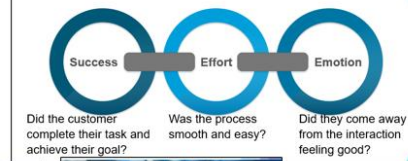
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What is Digital Customer Experience?

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



Fundamental Ingredients to Good DCX



Why Emotion Matters



Why Digital Matters



Script/speaking points:

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

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

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Effective Digital Strategies

Ingredients for an Effective Digital Strategy

1. Align with the overall vision and strategy for the organization
2. Understand current customer journeys
3. Implement the necessary technology
4. Train and support all staff
5. Measure success

Customer Journeys



The Importance of Omnichannel

Script/speaking points:

Here are a few things we covered in the section on effective digital strategies. 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

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

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 workshop. 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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3 – 2 – 1 Action Plan

- 3 What are three things that you learned or were reminded about for creating digital customer experiences?
- 2 What are two things you want to do to create better DCX?
- 1 What is one thing you are going to do right away?

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Script/speaking points:

Action Plan

[Have everyone complete the action plan in their workbooks. This should only take a few minutes. When they are done, they should share with one other person the one thing they want to do right away. (Virtually, they can do this through private chat with one other person in the workshop or they can chat it to everyone.)]

Transform your workforce

Watch how CXone empowers agents in this video demo.

[Watch now >](#)