HOW TO TRULY PROMOTE CUSTOMER ENGAGEMENT—
And Get It Right

Customer engagement (CE) was a hot topic among many of the industry pundits and presenters at our CRM Evolution conference this past August.

But what exactly is customer engagement? And how do companies build engagement among their customer base? How should results be measured, and what is the value of improved CE results?

These are just some of the questions our contributors answer in this month's Best Practices Guide to Customer Engagement.

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CRM CUSTOMER RELATIONSHIP MANAGEMENT

The Golden Rules of Reducing Customer Effort

The concept of the "golden rule" can be found in many cultures and traditions, but one common principal shared is that people should treat others in a manner in which they themselves would like to be treated. This concept can be applied to customer engagement.

Consider how your service organization handles inquiries and compare it to how you would want to be treated. You may find that your organization is not following the golden rule principle. Many organizations are reluctant to upgrade legacy contact center systems to effectively address the "golden rule" of customer care because their existing contact center infrastructure continues to accomplish fundamental tasks.

The problem is that the market and customer expectations have changed. As a result, many customer care groups naively delay upgrades and ignore warning signs that customers are not satisfied with their experience. Take a closer look at your customer care strategy if any of the following conditions are eroding the golden rule of customer care, which involves minimizing customer effort and maximizing satisfaction.

1. **You are making customers repeat information**—The annoyance meter is raised when customers are asked to repeat information after being transferred from an IVR to an agent, or between agents. Cost-effective technology will address this issue. For example, WhisperTel provides agents with a voice recording of what happened in the voice self-service channel prior to taking the call.

2. **Agents are not informed**—Knowing and anticipating why a customer is contacting you provides the foundation for reducing customer effort. An integrated CRM and ACD solution can make this happen.

The ACD routes calls and some even route other channels such as email, chat, and social media. The CRM manages data associated with each customer by consolidating information and acting as a central repository for data that can be used across many departments.

3. **You are always in reactive mode**—Being proactive will help to reduce customer effort and even salvage what may be turning into a bad customer experience. Take for example, one online retailer that has agents proactively making calls to people who abandon their shopping cart during the checkout process.

Another example is that one Human Resource outsourcer realized there were many questions regarding a benefits package that was mailed to their client's employees. To rectify miscommunication, they immediately launched an outbound calling campaign to all subscribers to head off questions and complaints.

4. **You are losing loyalty even before customers talk to an agent**—Customers are increasingly reaching out to agents when other channels have failed. Frequently, a website search has failed and a frustrated customer reluctantly calls a service number. This situation is especially common for the millennial generation who tend to make a phone call as a last course of action.

Focus on improving the self-service channel with more efficient routing to agents rather than trying to automate all tasks. Also, take advantage of data captured within an integrated ACD/CRM environment, which can provide agents with the knowledge that a caller recently communicated via another channel.

5. **You are using static call routing**—Are you able to easily change your IVR menu based on the availability and skill of your agents? If not, that is usually a good indicator that your customer care front door is failing.

Cloud contact center vendors have a range of capabilities you can use to optimize call routing. For example, routing rules can be set up for language, agent availability, queue times and more. More sophisticated ACD cloud providers use complex formulas to calculate the best route to an agent based multiple aspects such as both queue wait time and agent skill.

CONCLUSION

According to a survey by the Customer Contact Council, **59%** of respondents reported expending moderate-to-high effort to resolve an issue. **62%** of the respondents reported having to repeatedly contact a company to resolve an issue. These results clearly show that organizations need to continuously evaluate the effort their customers must use to resolve a problem or get a question answered. It is vital to implement process improvements that reflect the golden rule of making your customers' experience as positive and helpful as you yourself would like to experience. ■

Building a Culture of Customer Engagement

One of the biggest challenges your organization can face with implementing a customer engagement program can be dismantling the tried-and-true operational paradigms you've relied on for years. But don't let outdated ways of doing business deter you from moving ahead! By rethinking your approach in a number of key areas, you can build a culture of customer engagement:

1. Look for Data in Unexpected Places—
It's easy to overlook the valuable data that exists in many places within your organization, especially when it's not shared. But tapping into data that may reside in other functional areas can be essential for developing a clearer, more defined view of your customers. In fact, linking data from disparate sources is an important part of mapping the customer journey.

Take time to identify the different types of information you have, such as customer identity data, transactional information (online and offline), online activity information (including social media), customer feedback, and customer value and history. Don't overlook billing, ERP, and service provisioning systems. Be sure to note where the data resides, in which formats, and which stakeholders are responsible for collecting and maintaining it. By identifying the most useful subset of data sources across your enterprise, you can make it actionable and deliver more targeted, contextual service—a critical component for building customer engagement.
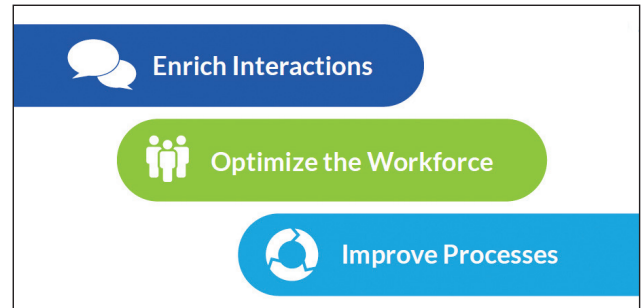
2. Rethink the Role of the Contact Center—
Contact centers need to do more than handle phone calls, emails, and chat sessions. The proliferation of mobile devices is turning contact centers into customer engagement centers that serve as the hub of customer insights across multiple channels, from Web to email to voice and social media. Since it's not uncommon for customers to use multiple channels to complete a transaction or even to use two devices at one time, you'll need to provide your service representatives with technology to support omnichannel engagement. This means giving them the ability to provide real time, contextual insights to personalize customer interactions.

3. Empower Your Employees—
Your staff can greatly impact the quality of the customer experience, but are you providing them what they need to succeed? Do they have the opportunity to extend and enhance their skills? Do your key performance indicators measure behaviors that actually foster customer engagement, or are they focused solely on delivering low-cost service?

To engage customers effectively, employees need to have some level of input into their work. This can mean being able to go off script and make decisions without always having to ask a supervisor. It also means being able to quickly access relevant information to make interactions with customers as personalized and informed as possible.

4. Think Beyond Demographics—
The days of relying exclusively on demographics to target communications and promotions for products and services are waning. Data captured during customer interactions can be used to develop highly personalized—even individualized—offerings that are relevant to customers. Using analytics, your organization can examine structured and unstructured data from a variety of data sources to quickly identify cross-sell indicators, competitive advantages—and even the telltale signs of potential customer defection. By providing this information to your front-line employees in a single view, you can facilitate smarter engagement and in turn, drive revenue and service recovery proactively.

5. Take Advantage of Technology—
Verint® Systems and KANA®, A Verint Company, offer a portfolio of customer engagement optimization solutions to help transform customer engagement in today's omnichannel service environment. It includes customer analytics, customer engagement, and workforce optimization solutions that can provide your organization with valuable insight for enriching customer interactions, optimizing the workforce, and improving business processes. With these powerful solutions, you can engage customers across multiple channels and deliver consistent, contextual, and personalized experiences that can drive sales and revenue. Contact Verint today to learn more. ■

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Transforming Your Customer Experience through Social Collaboration

Today, we are controlled by more virtual touch points than ever before including email, instant messages, websites, blogs, and social networks to name a few. And, with all these independent mediums vying for our attention, it makes it increasingly difficult to consolidate information, collaborate, work smarter and be more productive. In fact, employees today spend, on average, 28 hours each week writing emails and searching for information. It's time to take control of your organization's secret asset – KNOWLEDGE – and easily share it with employees, partners, customers and clients.

Enterprise social collaboration tools are being adopted at an increasing rate and can have a huge impact on business and productivity. More than 66% of the business value created from social collaboration lies in improving communications and interaction within and across an enterprise. McKinsey & Company estimates that a staggering $900 billion – $1.3 trillion in business value is unlocked through social networking tools and technologies.

Social collaboration can play a significant role in transforming your customer experience and specifically, your engagement levels. Consider the following stats when you ask yourself, "how social is your service?"

- 75% of organizations that deploy social collaboration platforms improve customer retention rates by 75%
- 71% of customers who have a positive social customer experience with a company recommend the company's products
- 56% of customers who use social to interact with a company feel a stronger connection

For a real-world social implementation that dramatically improved customer engagement, consider OgilvyOne Worldwide. Ogilvy is the world's leading direct marketing, digital marketing and marketing consulting network with over 100 offices in more than 50 countries. With such a large footprint, the key challenge facing Ogilvy was developing a way to optimize their customer engagement efforts in real time while focusing on increasing sales and revenue.

Assessing their situation, Ogilvy discovered that their "social intranet" tools were limited and they lacked the functionality of capturing and collaborating around valuable tribal knowledge. Going the route of a custom-built solution would have cost thousands of dollars and taken months to deploy. Ogilvy needed a more effective way to drive revenue around their deep domain expertise – simultaneously communicating with hundreds of client marketing, sales and support representatives, identifying efficiencies or inadequacies, and making necessary adjustments on the fly.

The search for a solution ultimately led Ogilvy to Bloomfire's knowledge management and collaboration platform. Since implementing Bloomfire, Ogilvy has benefited dramatically. Bloomfire is credited with:

- Improving content engagement by 30%
- Increasing user satisfaction by 75%
- Saving the company $200,000 by transitioning from a different enterprise social application

Bloomfire allows Ogilvy to create a customized client collaboration environment within days, as compared to months, enabling users to increase productivity immediately without lengthy development or training efforts. The solution also allows Ogilvy to match existing brand marketing campaigns, interact with specific user groups, and highlight the latest marketing, sales and support materials in-context with real-time conversations.

"Bloomfire's easy-to-use, consumer friendly platform has become a key asset that helps our clients do their jobs better every day," said Evan Shumeyko, Senior Director of Dialogue Strategy at OgilvyOne. "Now instead of a clunky, latent, inconsistent intranet portal, we can provide an agile, responsive, knowledge management and collaboration platform that integrates seamlessly in the flow of work and aligns with existing branding."

So, how social is YOUR customer experience and engagement? Businesses that are proactive and provide social collaboration tools that give customers a voice and access to information they need, when they need it, are fostering brand growth and loyalty while setting the stage for happy customers who can become your brand champions. ■

About Bloomfire

Bloomfire's easy-to-use enterprise knowledge and collaboration software enables people to efficiently share and leverage group expertise. With rich analytics and strong content creation and curation tools, we connect people with experts, facilitate social interaction, amplify knowledge and power teamwork at new levels. Our software fosters increased employee engagement, higher sales productivity, more responsive customer service, and strong communication.

Visit **www.bloomfire.com** for more information or schedule a demo with a Bloomfire expert today.

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Why Narcissistic Customers are Your Best Advocates

In its simplest form, customer engagement is a basic formula: communication plus trust equals engagement. Easy. But what exactly ARE engaged customers and how do brands drive them towards engagement?

Engaged customers are easy to recognize. They're advocates for your brand. They're the customers who are tweeting and posting about you, writing reviews and telling their friends about your products and services. They're loyal, vocal and highly valuable.

"A customer who is fully engaged represents an average 23% *premium* in terms of share of wallet, profitability, revenue, and relationship growth compared with the average customer." – Gallup

Every customer has the potential to become engaged, but It requires a strategic approach, starting with highly customer-centric communication.

COMMUNICATION

"Today's connected customer expects the conversation to be 100% about them and 0% about you," says Jason Falls, VP Digital Strategy at Elasticity PR.

Great customer service isn't about talking to customers, it's about listening. Customers don't want to hear about your processes, your policies or your company. They want the conversation to be completely centered around their wants, needs, experiences and feelings. They want to feel valued and they want the conversations to be human and personal.

"Customer service doesn't begin and end with a flight. It's an ongoing conversation between friends." – Delta Air Lines

Too often, brands follow a strict, purely economic-based approach to customer service. They provide agents with rigid scripts, set challenging benchmarks and focus heavily on metrics to determine success. Some agents become so focused on goals and locked in by scripts that they forget the customer is a human being with emotions and needs, just like them.

"For customers, feelings are facts. And any metric that does not account for this aspect of human nature is fundamentally flawed." – Gallup

Communication is the foundation of trust. Customers need to feel like they're being heard and that their issues are a top priority for agents. By engaging in personalized, real-time conversations and genuinely listening to what customers are saying, agents can lead customers down the path towards engagement.

TRUST

Trust doesn't happen overnight. It's the result of consistent, positive experiences with a brand. In 2014, 60% of customers decided not to make a purchase as a result of a negative customer service experience, up 5% from 2012. Customers have more choices than ever and wield an unprecedented level of influence over other buyers. Brands need to make consistent quality customer service a top priority to increase customer loyalty.

"Consistency is particularly important to forge a relationship of trust with customers." – McKinsey & Company

Concierge-style customer service is the newest and most effective way to deepen customer relationships. Customer service platforms that match

agents with customers give brands a significant advantage over competitors by enabling the same agent to help the same customer on every channel. As they get to know the customers, agents will feel more personally invested in the process and customers will feel more connected to the brand.

"Three out of four (74%) consumers say they have spent more with a company because of a history of positive customer service experiences." – American Express 2014 Global Customer Service Barometer

ENGAGEMENT

Many people think that customer engagement can't be measured, but engaged customers are highly visible. They are your cheerleaders, your advocates and your friends. They are the ones spending more, going out of their way to use your products and services, who are writing reviews for you, tweeting and posting about you and sharing their experiences with friends and peers.

47% of customers share good experiences all of the time. – American Express Global Customer Service Barometer 2014

Engagement may seem like a challenging concept to measure, but just look towards your most visible customers to see what engagement looks like. And most important, really listen to what they are saying. ■

For a demo of Sparkcentral's upgraded customer engagement platform, visit: **www.sparkcentral.com**.

Powering Customer Engagement Strategies in the Digital Age
BEST PRACTICES FOR DELIVERING AND SUPPORTING DIGITAL CUSTOMER ENGAGEMENT ACROSS ORGANIZATIONS

Today, we live in the 'Experience Economy', a term first described in an article published in 1998 by B. Joseph Pine II and James H. Gilmore, titled "The Experience Economy". Their concept was that organizations who are selling more than products & services, but offers an 'experience' to their customers can charge more and can better differentiate themselves.

This concept has become a reality for many companies. Organizations who are successful in crossing the CX-Chasm have proactively designed what the Customer Experience (CX) should look like to deliver on their brand promise. In order to become part of the 'Experience Economy', organizations need to design Customer Journeys and actively engage with their customers but also align their organizational structures to support this. Customers do not worry typically about your organizational silo's but the Customer Experience will be negatively impacted as it is build across all of your business functions.

In today's digital world, engaging with customers is more challenging than ever:

- More time is spent on mobile devices, changing the way content is consumed.
- According to Ovum, 75% of consumers use three or more channels to get their question answered and/or their problem solved.
- Peer recommendations are one of the most critical factors in buying decisions and brand perception.

Attempts to deliver great CX through siloed efforts have failed as they lack coordination across the touchpoints comprising the journey. Successful organizations realize they need to implement intelligent cross channel capabilities across all digital channels, including the voice channel.

Customers and potential customers are often forced to change to another channel during the same sales or service conversation. Often this is because the initial channel of choice does not solve their issue or the response is not timely enough. Typical examples of such siloed approach are:

- Voice channel is managed separately
- Digital channels live in point solutions and run by dedicated teams
- Company website is not integrated in to the customer engagement strategy and lacks proactive communication capabilities.

Treating each of these interactions in a silo means you are missing the complete picture. The crux is that organizations need to manage the journey the customer is on and not just a series of single interactions.

OVERCOMING THE CUSTOMER ENGAGEMENT CHALLENGE

To be truly effective, organizations must implement an integrated approach to customer engagement that spans sales and customer service to realize powerful business benefits.

To realize this opportunity, organizations need to look at the following 4 best practices.

BEST PRACTICES FOR SUCCESSFUL DIGITAL CUSTOMER ENGAGEMENT

1. **Manage designed customer journeys across all touchpoints and channels** including self-service to deliver a consistent, seamless and low effort customer experience
2. **Empower your agents with multi-modal capabilities that provide insight into customer journey history and context** thus increasing agent productivity, reduced churn, and improved customer experience through insight into customer context and analytics

3. **Implement cross-channel digital quality management including text analytics** for monitoring the quality of assisted interactions and to identify training and coaching improvement opportunities and compliance adherence. Only in this way can you to determine what is really happening in your contact center.
4. **Deliver a personalized and dynamically driven web self service experience** to provide personalized offers to increase revenue and customer satisfaction

The ability of companies to deliver a seamless customer experience across customer interactions largely depends on their ability to manage the these interactions in a cross-channel context. Those that continue to rely on disconnected channels, keeping their data in operational silos, are failing to extract the inherent value of their knowledge about their customers. By failing to enable a unified view of the customer across channels and touch points, companies aren't capitalizing on the context they can bring to each interaction, and are instead providing the same set of generic interactions that inevitably lead to a poor customer experience. By effectively leveraging a customer's context—purchase history, recent interactions, past service issues, unfinished processes, etc.—and combining this with effective business rules, companies can deliver a more satisfying customer experience. ■

To learn more about how to support Digital Customer Engagement Strategy and the best practices described in this article, view the on demand webinar **"How to Deliver a Seamless Omnichannel Customer Experience"**.

For more information visit **www.genesys.com**