

LEADING THOUGHTS



Optimizing the Customer Experience

By Kathleen Peterson, PowerHouse Consulting

Transform high-level strategic goals into tactical operational tasks and activities throughout the enterprise.

Today's companies recognize an excellent customer experience as a key market differentiator, which is especially significant during these turbulent times. There is a growing understanding that delivering the *best possible* customer experience is everybody's job within an organization, and not just the role of the contact center. The desired outcome is that all customer touch points are aligned and in tune to the same objective — meeting customer needs, wants and preferences in a professional and consistent manner while simultaneously gaining efficiencies and simplifying processes.

The "optimization" of the customer experience occurs when there is a linkage between strategic goals and operational execution. The result is a plan for action and improvement that yields a competitive advantage by design rather than by default. Although contact centers most assuredly have been in the business of delivering service, designing an experience combines the executive strategy with the operational tactics. There is tremendous opportunity for contact center leaders to position the center as a strategic partner in the company's overall mission, rather than a back-office servicing function.

The Power of the Experience

In the most advanced environments, delivering on the customer experience is woven *throughout* the company as an integral part of the business mission.

Unfortunately, this is not always the case. It often falls to the contact center to constantly analyze and conceive ways to contribute to that experience. When you take time to view the customer experience as a "concept" and to dissect its contributing factors, the implications can be resounding and the results significant. Consider the possibilities:

- Strategy is transformed to tactics at every customer touch point.
- Customers can do business with you through their own preferred channels.
- A "branded experience" emerges, with deeper association to the brand.
- A shared understanding exists throughout the enterprise of objectives and roles.
- There is an interest in and enthusiasm for crossfunctional collaboration.
- A strong and deeper market penetration is possible.

Contact center leaders will be well served by conducting a Customer Experience Optimization Review to identify and document strategic planning initiatives,

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desired elements of the customer experience and any existing management, operational and reporting issues. This positions the center as a strategic asset as opposed to an “overhead” department; the customer experience becomes real and tangible.

The Customer Experience Optimization Review

STRATEGIC PLANS

A Customer Experience Optimization Review begins by identifying the strategic plans that are in place at the executive level. One way to do this is by answering a set of questions. The following will provide the information necessary to translate strategic goals and objectives into tactical operational tasks and activities.

Where are you going?

The company vision defines the desired future state of the organization and represents the direction the company is headed.

Why do you exist?

Companies exist for some purpose. Defining its “mission” contributes to how the vision will be powered.

How do you add value?

At a strategic level, two key areas identify the means by which your company adds value — business drivers and the value proposition. Business drivers are the “rules of engagement.” They identify the means by which value is added and usually fall into categories such as speed, quality, luxury, price, location, ethics, etc. As an example, The Ritz-Carlton Hotel Company has a primary business driver — “luxury.” That is the expectation, and that is what is delivered consistently. Business

drivers, when properly communicated and embraced, actually drive behaviors.

The value proposition represents the context in which your products and services “live.” Customers set expectations based on your value proposition. For example, Internet footwear retailer Zappos ALWAYS offers free shipping and, in most cases, shoes arrive overnight. The product it sells is top quality; it is not a discount e-tailer. Zappos also controls its own inventory; if the product is not in stock it does not appear on the Web site. The mission is to provide a seamless experience for the customer. Like business drivers, the value proposition must be understood and effectively communicated to drive a set of behaviors across the contact center and the enterprise.

When the contact center staff utilizes business drivers and the value proposition as the context for their communication, behaviors emerge that support quality, accuracy, revenue and brand.

Who are you?

You are your brand. Brand is about identity. Brand in the contact center is more about experience than logos, marketing, packaging, etc. The creation of a “branded experience” is an important element in driving the brand to the front line and in bringing the brand to life for your customers.

How do you make money?

The bottomline reason for being in business is to grow and to make money. This is accomplished by attracting and retaining customers, increasing the amount customers buy and minimizing costs, credits and discounts. The contact center needs to include in its agents’ education how the company that pays them actually makes money. Then a connection must be made to the contact center’s key role in that effort.

How do you drive productivity?

Efficiency is a great partner to growth and the primary mechanism for driving productivity. For growing companies, there is a time

of accelerated change to accommodate the growth. Contact centers and others must closely monitor asset utilization (i.e., am I overstaffed, understaffed, etc.?). The ultimate driver of efficiency resides on a process level, not on an individual level. Each extra step in a process adds cost and complications that cause potential errors, rework and loss of customers. Most processes extend beyond the contact center. When we ask what drives productivity, one could answer, “healthy cross-functional relationships.” To remove the kinks from any process, engage those other links and work it out. Then everyone gains!

What do customers expect from you?

Customers’ expectations were the subject of Marcus Buckingham’s first book, *First Break All the Rules: What the World’s Greatest Managers Do Differently*. Buckingham presented data from 20 years of Gallup customer surveys representing more than a billion people. Respondents identified four key categories in which customer expectations lie: accuracy, availability, partnership and advice. The findings revealed that accuracy and availability only serve to prevent customer dissatisfaction. Partnership and advice are the true differentiators. According to Buckingham, partnership and advice may not be easy to do, but they are difficult to steal. It is critical to determine exactly the expectations, tolerances and preferences of your customers.

What are the desired elements of the customer experience?

A valuable planning task is to spend some time validating and documenting exactly the elements of a superior customer experience for your brand and business goals. It is important to specify what they need to be, with no limitations or restrictions. Consider these examples:

- Customers are able to select the access channel THEY prefer (e.g., call, Web, email).

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- A service level target is established to manage delay in meeting customer needs.
- Music or messages that the caller will hear while on hold are carefully crafted.
- Agents are skilled in building rapport and relationships.
- Agents are knowledgeable on products and services.
- Agents understand when and how to sell additional products and services.
- Systems are responsive and easily navigated.
- Necessary information to process calls is easily accessible (online).
- There is first-call resolution on some reasonable percentage of calls.
- Call transfers are less than X percent.
- Agents have customer history displayed upon call arrival.

Especially critical at the strategic level, specificity is a critical factor when it comes to defining essential business elements, drivers and goals. However, the nature and outcome of the customer experience is dependant on systems, processes, knowledge, etc. So once business objectives are validated and documented, it is time to understand the operational infrastructure that must be in place to make it all happen.

OPERATIONAL AREAS OF FOCUS

There are several areas to consider and review when it comes to optimizing the customer experience. These include technology, systems, operations, processes, leadership, organization and people. These combine and interrelate as contributing factors to the customer experience. The sidebar on page 4 illustrates sample focus points for each area.

A Task Worth Doing

Conducting the Customer Experience Optimization Review may appear to be a daunting task. Yes, it is both intensive and extensive. However, the yield is the ability to understand the organization's strategic goals and to align those goals to the contact center. The review provides an opportunity to take a step back and evaluate where the contact center has been going, where it needs to go, where it is now, and the actions required to close any gaps.

The review may also be used to enhance and better frame the reports that emerge from the contact center to other areas of the organization. For far too long, contact center reports have focused purely on production metrics. This invites a factory-like identity. The opportunity exists for richer information on current practices, systems and processes that cause pain to customers and inhibit their experience.

In all, the Customer Experience Optimization Review offers many advantages to your contact center:

- Provides a means to gain intimate understanding of your customer experience objectives.
- Aligns contact center activities with your company's vision and strategy.
- Reveals valuable and consistent information about your customers.
- Assists contact center leaders in reporting effectively to senior management; provides value and increases center's visibility and importance.

By evaluating technology, training, quality and other operational elements, you will find tremendous opportunity to weave customer expectations into an excellent customer experience. You will also have the baseline information required to design a unique plan for improvement and action.

Making It Happen

It is not enough to want a truly wonderful customer experience based on your company brand and business goals. You must want to make it happen. To do so, you may need to confront some uncomfortable issues and be willing to eliminate resources and processes that simply do not support the brand. A branded customer experience is so much more than a friendly voice. It is the contact center that hires the right people, trains them well, refines processes and constantly questions. Finally, it is the contact center with a clearly stated vision, true conceptual understanding of the customer experience and a set of business drivers that make it unique in the marketplace. 

ABOUT US

Contact Center Pipeline is a monthly instructional journal focused on driving business success through effective contact center direction and decisions. Each issue contains informative articles, case studies, best practices, research and coverage of trends that impact the customer experience. Our writers and contributors are well-known industry experts with a unique understanding of how to optimize resources and maximize the value the organization provides to its customers.

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Customer Experience Optimization Review

OPERATIONAL AREAS OF FOCUS

Technology

- Partner with IT; gain a seat at the table that evaluates technology.
- Understand the overall state of technology infrastructure; construct a blueprint.
- Determine and fully utilize routing and distribution capabilities.
- Understand technology limitations and associated impact.
- Clarify business continuity plans for the contact center.

Systems

- Understand speed, reliability and capability of existing systems.
- Determine effectiveness in the capture and use of customer data.
- Identify gaps in order to gain excellence in reporting systems.
- Monitor systems integration capability.
- Assess the robustness of quality monitoring system capabilities.

Operations

- Identify characteristics of demand.
- Define and assess workforce management practices.
- Assess resource utilization methodology.
- Develop reasonable service levels and key metrics.
- Determine valuable statistics and reports; provide access to them.
- Assure quality and accuracy of data.

Processes

- Organize demand by frequency and complexity.
- Distribute contacts intelligently.

- Determine areas for gaining call-handling efficiencies.
- Ease access to relevant information.

Leadership

- Assure that company vision is adopted in the contact center.
- Determine whether leadership can energize the environment.
- Assess whether communication is constant and consistent.
- Identify whether leadership is capable of engaging senior management.
- Build strong crossfunctional relationships based on a shared mission.

Organization

- Determine whether current environment is scalable and positioned for growth.
- Identify and manage the contact center's visibility within the organization.
- Evaluate management structure (e.g., teams, ratios, roles, responsibilities).

People

- Clearly define functional roles and job descriptions.
- Fully determine employee skills and knowledge requirements.
- Identify potential gaps in training and job support.
- Establish creative recruiting, retention and career path strategies.
- Constantly evaluate job enrichment opportunities, employee satisfaction and morale.