Build a Better Customer Experience

Tips from 10 CX Industry Experts

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Table of Contents

Introduction .......................................................................................................................... 3
Silent Suffering: Why Your Customers Don’t Contact You | Roy Atkinson ......................... 4
Take These Three Actions to Prevent Customer Explosion | Jeanne Bliss ......................... 6
Culture is Key to Customer Experience but What Exactly is it? | Megan Burns ................... 8
“That’s not my Department” and 10 Other Phrases Customers Hate | Shep Hyken ............. 10
Talking Omnichannel but Organized Multichannel? | Peter Lavers .......................... 12
Four Characteristics of Standout Contact Centers | Erica Marois .......................... 15
Going Beyond “The State of Now” | Greg Ortbach ................................ 17
Think Differently for a Better Customer Experience | Stephen Pappas .................... 19
The One Thing You Need for a Great Customer Experience | Jeff Toister ......................... 21
Transform Customer Service into a Customer Insight Machine | Jeremy Watkin ................. 23
Conclusion ......................................................................................................................... 26
Introduction

In this e-book, we’ve gathered insights from 10 of the leading influencers and innovators in the field of Customer Experience (CX). Each has shared his or her tried and true secrets for building that rare combination of happy agents and loyal customers that we all want our organizations to champion.

We begin with Roy Atkinson who discusses the phenomenon known as “friction,” which in short, is anything that complicates the experience for customers or gets in the way of them getting the service they expect. Next, Jeanne Bliss presents strategies and tactics that teach leaders how to avoid taking on too much, too soon—a concept she terms “boiling the ocean” and instead, breaking CX down into easily digestible bite-size pieces. Megan Burns then talks about culture and how to change it for the better in your organization.

Our second set of articles tackles phrases customers hate (Shep Hyken), standout contact centers (Erica Marois) and omnichannel vs. multichannel (Peter Lavers). You’ll learn to never have anyone at your organization utter the deadly “This is not my department” phrase to a customer, how to avoid short-term thinking, and discover why empowered agents are part in parcel of standout contact centers and in turn, happy customers.

We conclude with articles that explain how to move beyond the ‘state of now’ (Greg Ortbach), what you need for a great customer experience (Jeff Toister), how to think differently for a better customer experience (Steve Pappas), and how to transform your organization into the customer insight machine (Jeremy Watkin).

Whether you are a CX leader, a frontline employee with a passion for doing what is right for the customer, or a customer yourself, there are lessons and takeaways within these articles for each of you—and we hope you enjoy them.
Silent Suffering: Why Your Customers Don’t Contact You

By Roy Atkinson

Recently, an HDI member who is a senior IT manager asked a troubling question: Why do end users or customers ignore issues and continue to suffer, rather than contact support and get the issues addressed?

What we know from the HDI 2017 Technical Support Practices & Salary Report is that 64 percent of customers (or end users) contact support. Now it may be that some get through an entire year without ever having a reason to contact support or ask a question, but 36 percent of your user base is too large a percentage to write off and say, “They’re fine.” This especially holds true when our friends at MetricNet tell us that the average is from 1 to 2.5 tickets per user per month, largely depending on the industry.

So, what is keeping a large portion of our workforce from taking advantage of the services the support center provides? To a great degree, it is the phenomenon known as friction.

Friction in service is very much like friction in physics—it causes us to exert more effort than we otherwise would. Simply put, friction is the difficulty we encounter when we need service. Here is how one employee answered the question about why she didn’t contact support to get things fixed, instead of trying to work through them: “If I call the service desk, it becomes my problem, even if it isn’t. I call and say that the printer in this area is broken. Now there’s a ticket in my name, and I have to go check the printer and let the service desk know if it’s working after I get an email telling me it’s fixed, and then I get a survey in my inbox. It wasn’t my problem—it was a broken printer down the hall—but it becomes my problem.”

Add to this the time spent waiting in a phone queue, or getting a chat started, or filling out a web form. The effort involved in getting the printer fixed is greater than the effort of walking the extra distance to the next closest printer—so the end user never calls or otherwise contacts support.

The same holds true when the issue is something annoying but relatively minor with the person’s laptop, phone, or tablet. An employee may hobble along for months with a broken keyboard, jumpy mouse, cracked screen, or crashing app without ever reporting it.

ABOUT THE AUTHOR

Roy Atkinson is one of the top influencers in the service and support industry. His blogs, presentations, research reports, white papers, keynotes, and webinars have gained him an international reputation. In his role as Senior Writer/Analyst, he acts as HDI’s in-house subject matter expert, bringing his years of experience to the community. He was inducted into the HDI Hall of Fame in April 2018.

Roy has an extensive background in customer service as well as technical support. He has worked in the banking, retail and hospitality industries as well as information technology. He worked service desk and desktop support at The Jackson Laboratory, one of the world’s premier scientific research institutions. He completed a two-year course of study and earned a Master’s Certificate in Advanced Management Strategy at Tulane University’s A.B. Freeman School of Business in 2011. He is one of the co-hosts of the popular #custserv chat on Twitter, which has been running continuously every Tuesday since 2009.

You can follow Roy on Twitter: @RoyAtkinson
If customers or users have negative feelings about support, they are far less likely to contact you, of course. If the experience was miserable the last time the user mentioned above tried to get attention on a printer issue, how likely is she to try again? Not very. Customers can lose confidence in the support center for a number of reasons—including, but not restricted to:

- Incorrect information
- Inconsistent information
- Lack of empathy, especially for a sense of urgency
- Length of time to get an issue addressed
- Assigning blame to the user
- Concentration on process rather than people
- A history of getting no for an answer

One way to improve this phenomenon and reduce the friction is to use the Customer Effort Score (CES). The score is based on a single question, of which there are many variations: How easy was it to get your issue resolved? Although there are various ways to rate it, the simplest is a scale of 0 to 5, with 0 being very difficult and 5 being not difficult at all. When you receive very low customer effort scores, you can follow up with those folks and see what made it so difficult, just as you would follow up with those who gave you very low customer satisfaction scores.

The best way to avoid making it difficult for your customers and users is to do as much as you can to prevent things from going wrong in the first place. But this is not always possible. When the broken printer turns out to be broken because the maintenance crew smacked it with a heavy hand truck, thereby breaking the feed trays, there isn’t anything in your monitoring or self-healing systems that can help you.

The whole question of being difficult to deal with goes straight to the heart of customer experience. Understanding what customers go through and how they feel about it at every stage is an important part of improvement.

Seek out those who haven’t contacted support in the past six months and ask them why. It’s a good proactive step to help end the suffering in silence.

This article originally appeared in SupportWorld.

89 percent of customers get frustrated when they need to repeat their issues to multiple customer support representatives.

*Accenture
Take These Three Actions to Prevent Customer Explosion

By Jeanne Bliss

Make no mistake about it, customer experience implementation within an organization is a major undertaking. It often involves multiple departments, the organization’s leaders, and the C-suite. I stress to my clients that CX work must be performed in bite-sized pieces, so it can become part and parcel of the company’s long-term strategy. You can’t try to tackle everything at once. The guests on my podcast, The Chief Customer Officer Human Duct Tape Show can certainly attest to this sentiment.

Do you know what happens in CX implementation when you try to take on more than you can handle? I call it “boiling the ocean.” You take on too much, too fast. When you “boil the ocean,” you end up creating a bigger mess because eventually, multiple parts of the organization end up translating and acting independently (then you’ve got siloed work). To avoid this dilemma, my suggestion is to internalize the five competencies. These establish an engine for accelerating customer growth and drive clarity for the customer experience transformation.

FIVE COMPETENCIES FOR CUSTOMER-DRIVEN GROWTH

1. Honor and manage your customers as assets. This allows you to focus on measuring if you did or did not earn the right to customer growth.
2. Align around experience. This changes accountability and the story of the business from silo performance to customer life improvement.
3. Build a customer listening path. This unites multiple sources of customer feedback to tell the story of customers’ lives by stage, as they experience you/your organization.
4. Proactive experience reliability and innovation. This lets you know before the customers tell you if the experience you delivered was reliable and valuable to them.
5. One-company accountability leadership and culture. This unites leaders to guide the company to improve its customers’ and employees’ lives.
THREE METHODS TO SUCCESSFULLY IMPLEMENT CUSTOMER EXPERIENCE TRANSFORMATION

Keeping the five competencies in mind, follow the methods outlined below. These steps will help you establish a realistic strategy for implementing customer experience while keeping you from creating an overwhelming plan that attempts to “boil the ocean.”

1. **Break the five competencies into crawl-walk-run action steps.** For example, in competency one, honoring and managing customers as assets, don’t wait until you have all of the data perfectly aligned and automated to roll it out. Start with the data you have, even if it means manually building spreadsheets.

2. **Improve priority experiences while developing the five competencies.** Unite leaders on the identification of the priority CX touchpoints. Learn how to work as one company to solve and improve these touchpoints.

3. **Prove out the process before expanding.** One client wanted to embed the five competencies in three countries simultaneously. I recommended rolling out version one in one country first, then working out the kinks and gaining experience and relevant examples. Unfortunately, they yielded to pressure to go broad and fast—and you can predict how that ended. They attempted to “boil the ocean” and drowned in a sea of excess.

Now that you have a proper framework of how to approach your CX implementation, take the time to learn where your organization stands in terms of work that needs to be done and where. At the beginning of each coaching engagement with clients, I conduct a Five Competencies Audit to determine how much work has already been done in each competency.

Take this Reality Check Audit to understand how and where you need to embed the competencies into your business operations. Good luck!
Culture is Key to Customer Experience, but What Exactly is It?

By Megan Burns

You know the right culture is essential for great CX, but what does that actually mean? What is culture? Here's my definition: Culture is made up of a group's shared assumptions about the nature of the world and how to succeed in it.

Assumptions are what people use to understand what's going on around them and how best to react. Here are some examples:

- **Low trust culture.** You assume humans, in general, aren't trustworthy, so we have to set rules and monitor people to make sure everyone follows them.

- **Authoritarian culture.** You assume the boss is always right, so we must never challenge people more senior than us even when we know they're wrong. It's a career limiting move.

- **Techno-centric culture.** You assume the product with the coolest technology will win in the marketplace, so we should build whatever we find exciting even if no one wants or needs it.

- **Psychologically safe culture.** You assume mistakes are part of life, not a sign of incompetence. If you mess up or something doesn't go as expected, it's okay to acknowledge and learn from it.

- **Collective culture.** You assume the group's success matters more than any one individual, so we are willing to do what's best for the team, even if it's not what we would prefer personally.

**CULTURE CHANGE IS REPLACING OLD, UNHELPFUL ASSUMPTIONS WITH NEW ONES**

Culture is hard to change because most of the assumptions that shape it are unspoken. The first thing a change agent needs to do is spell out what you think people are assuming now based on how they behave. Then you can decide what you want them to assume instead. Here's an example of what this would look like in a product-centric company:

ABOUT THE AUTHOR

Megan Burns is a pioneer in the CX field and CEO of Experience Enterprises, the firm she started to give people in large corporations a more practical, effective, and sustainable way to drive customer-centric change. Recently named one of the 15 most influential women in CX, Megan writes for CMO.com and has been quoted in publications like the Wall Street Journal and Inc. Magazine. A Forrester analyst for more than 10 years, she built one of the first CX maturity models (featured in the book *Outside In*) and has written more than 75 reports on leading CX transformation.

You can follow Megan on LinkedIn at: https://www.linkedin.com/in/meganburns/
• **What people assume now.** The best way to succeed is to come up with a bunch of ideas for new products and services, then market the heck out of them to create demand.

• **What you want them to assume.** The best way to succeed is to figure out what customers want to accomplish in life and find new ways to help them reach those goals.

Here's an example I use with clients to change how they see the problem they’re trying to solve:

• **What many CX leaders assume now.** People in their company don’t care about customers, at least not as much as they care about profits and financial results.

• **What I want them to assume.** Customer experience is the “eat healthy and exercise” of business. People know it’s important, and on some level, they want to do it, but changes in the business world have made it harder to do what’s good for us.

These are just two examples. Most cultures have dozens, even hundreds, of assumptions like these—so don’t get caught up trying to capture them all. Make a list of the five that are most directly related to the change you’re trying to drive, then move to the next step.

**SHOWING IS BETTER THAN TELLING TO CHALLENGE OLD ASSUMPTIONS**

Once you have a list of assumptions to change, you’re ready for disconfirmation—getting people to see that their old view of the world is incorrect. Of course, telling people they’re wrong never works as well as showing them, which is why I recommend a technique called “exposure” that psychologists use to cure people of irrational fears. The idea is simple—put people in the same situation over and over and let them see for themselves that what they thought would happen isn’t what actually happens. In CX, you might help employees see that customers actually don’t understand jargon-filled emails, employees with flex-time actually work more than those forced into offices on a set schedule, and that bending the rules in the name of CX really won’t get you in trouble with the boss anymore; it may even win their praise.

The key to making “exposure” work is repetition. People need to trust that what they saw once or twice wasn’t just a fluke—rather, it’s a more accurate view of reality. Expose them often enough, though, and they will change the internal database of if/then rules that drives every decision they make and every action they take. You’ll have changed culture not by force but by helping individuals change themselves.
"That’s Not My Department” and 10 Other Phrases Customers Hate

By Shep Hyken

You have a problem. You call the phone number listed on the company’s website. You wait on hold for what seems much longer than the 10 minutes they said you would be holding. You finally get to a customer service rep. You tell your story and the customer service rep responds, “I’m sorry, that’s not my department.” Then you’re transferred to someone else and the game of holding and telling your story starts all over again.

This has happened to many, if not all of us. I have good news. Since customer service has become a center of attention for most companies (even though some still don’t get it right), “That’s not my department” is being heard less and less. That said, there are still plenty of other phrases and words we, as customers, hate to hear. Here are 10 more:

1. “You’re wrong.” Customers hate to be told they’re wrong.
2. “I wasn’t here when that happened. It’s not my fault.” Customers don’t care whose fault it is; they just want someone to help.
3. “I’ll get the manager, but he’ll tell you the same thing.” Why don’t we wait and see?
4. “We’re a little busy now.” What, too busy to take care of your customer?
5. “The person you need to talk to is on vacation and won’t be back for a week. Call back then.” Customers hate to wait. Why isn’t there someone to cover for a person who everyone probably knew was going to be on vacation?
6. “We can’t do that.” My dad always said, “Can’t means ‘won’t try.’” Customers want to see you at least make an attempt to help them.

About the Author

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7. “We won’t do that.” Almost the same as can’t, but more emphatic. Still, make the attempt to find a solution.

8. “Your call is very important to us. The wait time is 45 minutes.” Apparently, the call is not really that important.

9. “You’ll have to…” Customers hate being told “you have to...” Find a way to make it easy on them.

10. “No!” Does anyone like to be told no?

This list is by no means complete. There are plenty of other words and phrases people say that upset customers, cause them to lose confidence, and may ultimately cause them to leave and never come back.

So, here’s a little homework. Share this article with your team, then sit down and talk about which of these phrases might be in your vocabulary—and banish them. Develop better responses. For example, what else could you say instead of “It’s not my department” that won’t upset a customer? True, it may not be your department, but what you say and how you get that customer to the right person will make or break their confidence in you and your company.

Put yourself in the shoes of your customer to determine the best way to respond. A customer-friendly response will comply with a modified Golden Rule: Say unto customers as you would have customer service professionals say unto you.

89%

Organizations with Omnichannel customer engagement strategies retain on average 89 percent of their customers.

*Aberdeen Group*
Talking OmniChannel but Organized MultiChannel?

By Peter Lavers

Remember when we used to talk about channels and media?

Life was simple. Channel meant physical route to market—e.g., retail, wholesale, intermediated, direct. Media meant one- or two-way communications devices—e.g., TV, radio, telephone, website, email, web chat, face-to-face.

These terms have effectively amalgamated since we started to become multichannel. eCommerce kicked this off on a massive scale, although the catalog and home shopping industry would say it’s been going for a lot longer than the internet (see Kelly Phillips Erb’s article in Forbes).

The key point is that the website (a communications medium) also became the channel. This has been repeated with mobile devices and to some extent social, which when added to the traditional routes to market, means that a business has become multichannel.

This change has been complemented by the move to purely digital products in some categories—e.g. music downloads, e-books/e-newspapers/e-magazines, movie streaming, SaaS. Just think how much retail space used to be taken up with the predecessors of these digital products—and the associated hardware (CD/DVD/video players, landline phones, fax machines, etc.). I couldn’t find an estimate, but I’m guessing that it’s thousands of miles of shelving.

And things are still changing fast. The automotive sector, for example, is in an unprecedented period of market and legislation-driven disruption in its brands, products, markets, fuels, financing, taxation/charging—and channels and media.

Autonomous vehicles will completely transform ownership and usage in urban areas by as soon as 2025—and will be utterly connected. Who would have thought that your automobile would be as much of a channel as your tablet or mobile phone?
Which brings us to what marketers are now talking about—the omnichannel customer experience. The word "omnichannel" has been around for a few years, and as far as I can see nobody has conclusively nailed a definition that’s very distinct from multichannel. I don’t see this as a problem, as it seems clear that omnichannel is a concept rather than something you can put in a box, and it’s evidently a progression from the multichannel approach described above.

Multi means many and omni means all or universal, and that’s how the difference is often described—multi implies separate while omni implies interconnected or integrated. So, is omnichannel just well-connected multichannel?

I’d suggest that this doesn’t do justice to the seismic changes that the omnichannel customer experience will demand of businesses in the next 10 years.

These changes will affect a lot more than the marketing department. Marketers have rightly seized the opportunity to join up communications channels but I would assert that we need to go further as businesses. Pretty much everything described so far has been about what businesses do for and to our customers. We do marketing and sales, but the customer does their experience.

Multichannel is therefore (but unintentionally, I believe) not a customer-centric term. It has been about how we as businesses organize our channels, rather than taking an outside-in view that it’s the same customer taking a sales or service journey using the channels and media that are the most germane to their requirement.

I passionately believe that effective omnichannel customer engagement can’t be achieved without a customer-centric business model. This points to a distinct definition of omnichannel customer experience, which is different from omnichannel marketing:
• Within business capabilities, I include organizational design, culture, staff competencies, ways-of-working, agility, systems, processes, insight, propositions, data, compliance, standards, and measures.

The customer journey is therefore at the heart of the omnichannel approach and the challenge is beyond the remit of one department. It is therefore crucial that the CEO gets this message and champions omnichannel, because otherwise you’ll just end up with multichannel done better.

Because in reality, most companies are talking omnichannel in their business strategies, but they’re actually still organized as multichannel.

That’s a bold statement! What do I mean by it?

I’m referring to companies that are still essentially product-centric in the way they’re set up or have siloed channel management in their operations. I’ve had the privilege of working with many companies around the world in most business sectors, and I can honestly say that customer centricity is still a journey that most businesses are on rather than a destination they’ve achieved.

The explosion of all things digital illustrates this assertion. Many companies have realized the urgent need to catch up or develop in their digital capabilities using agile principles, but they find that their internal change management can’t cope with such disruption. A digital development department or team is then established and empowered to get on with it and launch something as quickly as possible to avoid competitive disadvantage.

You’ll never achieve a distinctive brand-enhancing omnichannel customer experience if your company’s current organizational design has in-built competition and tension across its channels. Neither will you if you’ve (perhaps unintentionally) established a setup where channels have different management, objectives, culture, agencies, and service levels.

So, is there any hope for large, established businesses with infrastructures and legacy systems?

Yes, there is!

This is an excerpt of an article that originally appeared on the WCL blog. The full article can be found [here](#).

The average adult American uses 4.3 devices, with 70 percent using smartphones.

*Forrester*
Four Characteristics of Standout Contact Centers

By Erica Marois

What does it take to deliver standout customer service? It’s a question on the minds of many business leaders since customer experience trumps price as the number one competitive differentiator in today’s economy. While no secret formula makes for an outstanding experience, ICMI has uncovered four characteristics that its ICMI Global Contact Center Awards winners have in common.

CONTACT CENTERS EMPOWER THEIR AGENTS TO SAY YES

For the Citrix customer care team in Raleigh, NC, saying yes is part of everyday life. Winner of the 2017 ICMI Global Contact Center Award for Best Medium Contact Center, they’re on a mission to give employees the freedom to act in the best interest of customers. Rather than resorting to statements regarding policy or procedure, agents at Citrix are trained to say yes to customer requests, even if that means going off script.

What are some practical ways to empower agents to do what’s best for customers? Leslie O’Flahavan offered these suggestions in a recent #ICMIchat:

• Empower agents to make best decisions for customers by banishing handle-time expectations. It takes as long as it takes.

• Empower agents to make best decisions for customers by setting reasonable expectations about how many contacts they’ll handle.

• Empower agents to make best decisions for customers by allowing/requiring them to free-text when they write to customers.

Erica Marois is the Content Manager at ICMI. She hosts ICMI’s weekly tweet chat (#ICMIchat), moderates and produces ICMI webinars, manages content on icmi.com, leads the ICMI Global Contact Center Awards program, and is a member of the ICMI Contact Center Expo Advisory Board. She often speaks at industry events and is passionate about connecting members of the contact center community and helping customer service leaders find unique solutions to their most significant challenges.

You can follow Erica on Twitter at: @EricaMarois.
Build a Better Customer Experience
Tips from CX Industry Experts

Signs.com, the 2017 winner of ICMI’s award for Best Chat Support, thrives on and believes in collaboration. If a customer experience representative receives a design-related question, they can chat with the designer in real-time using an internal chat system to check up on the design. The result? The customer gets an immediate response instead of a transfer to another department. And according to Madison Page, manager at Signs.com, customers love it.

**CONTACT CENTERS SERVE CUSTOMERS IN THEIR CHANNEL OF CHOICE**

According to Sprout Social, 90% of customers have used social media to interact with a brand. Many of those interactions involve service requests, and yet ICMI research reveals that only 41% of contact centers currently offer formal customer support through social media. The result? High frustration and missed opportunities. That’s precisely why Dorel Juvenile set out to add social media customer care to their arsenal in 2015. Aside from winning the ICMI Global Contact Center Award for Best Social Media Customer Care, they’ve reaped countless other benefits since completing the channel implementation.

“These channels provide prompt responses and convenience,” says Michelle Williams, director of Consumer Care at Dorel Juvenile. As a bonus, social media allows our customers an opportunity to publicly share positive reviews, positive experiences, and their personal success stories with our products.”

**CONTACT CENTERS ENCOURAGE CAREER GROWTH AND DEVELOPMENT**

As the contact center agent’s job grows in difficulty, the most successful service teams are working to carve clear career paths for their employees. At UPMC Health Plan, employees engage in formal career-pathing meetings with their manager twice each year. Often, agents express interest in moving to a higher tier of support, but they discuss long-term goals, too. Managers encourage honest, open dialogue about future career opportunities, and work to identify skills and projects that would help them aspire to the position they seek. With individualized resources and information in hand, managers and agents develop an action plan, which might include job shadowing in a different department, working on a collaborative project with another team, or networking with colleagues.

“We know that each team member who leaves our department to go to another part of the company takes the spirit of service with them, as well as a strong understanding of our members’ needs,” says Anne Palmerine, vice president, Customer Engagement & Enrollment Services, UPMC Health Plan.

*This is an excerpt from a post that originally appeared in Contact Center Pipeline.*
Going Beyond “The State of the Now”

By Greg Ortbach

Customer service is what connects the dots between the brand promise and the customer experience (CX). As a department, customer service is often tasked with honoring the checks that are written by sales and marketing.

I prefer to think of customer service as the middleware between the company product or service, and the customer. Much like an API (Application Program Interface) specifies how distinct software components interact with one another, customer service requires the ability or protocol to communicate with the brand, as well as the customer, successfully.

If the customer service team is limited by process or the higher-ups are siloed or otherwise disengaged, the middleware simply cannot effectively communicate. Bridging the gap between the brand promise and the customer experience can be especially challenging if the C-suite has never participated in frontline activities or experienced firsthand the same support channels their customers are subjected to.

Today, brands have unparalleled access to data and metrics. Companies are tracking anything and everything that could be remotely considered part of the customer experience simply because they can—but what exactly are they doing with it?

Some are analyzing past trends hoping to predict future demand. Some are comparing last year’s performance with current day to determine whether they are up, down, or flat. And others are actively measuring “the state of now” to benchmark how many customers are in the queue and how quickly support calls are being handled.

Now consider your daily routine. When planning for the day, you likely check the weather on your smartphone. Knowing what to expect enables you to plan and provides more immediate value than

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**ABOUT THE AUTHOR**

Greg Ortbach is a a CX engagement catalyst and co-host of #CustServ Chat. His days are spent networking with clients, immersing himself in their businesses. Clients rave about his ability to coordinate and manage projects, inject effective functionality into web applications, and optimize the customer experience.

Greg was named a top-10 finalist in 2005 for the BDC Young Entrepreneur Award. He also founded webAssist.ca, a web development firm that has received numerous awards. He was named one of the Top 25 CX Influencers to Follow by Panviva, Top 50 Call Center Twitter Accounts to Follow by Playvox, Top 50 Thought Leaders to Follow on Twitter ICMI, and a Top 100 Most Social Customer Service Pro On Twitter by Huffington Post.

Greg loves to perform onstage at open mic events where he unleashes his creative side.

You can visit Greg’s website at www.GregOrtbach.com and follow him on Twitter, @GregOrtbach.
comparing the forecast with the same day last year. Perhaps, however, even more valuable is the reality check of stepping out onto the front porch and experiencing it for yourself.

Every customer interaction is a gift. It is a real-time gauge on how well companies are living up to the brand promise—at that exact moment. Opportunities like this can provide tremendous insight as to how the customer is feeling. While frontline teams rely on obvious cues such as language and tone—when properly trained, they’re also able to pick up on subtle inferences of dissatisfaction. At that juncture, they are in the best position to make things right by ensuring a customer is satisfied and that their experience is a positive one.

Brands that stay siloed from the frontline or become too reliant on data run the risk of missing the point. In some cases, they’re simply too far down the rabbit hole to have the presence of mind to walk around it in the first place.

**So, what are three things you can do today?**

- Spend time thinking about which data can provide the most insight and ability to live up to your brand promise.
- Ensure the top line, bottom line and frontline of your company are equally engaged and working toward the same goal.
- Map your customer journey and look for redundancy and unnecessary hoops for customers to jump through.

I encourage companies to explore their customer journey often and leverage their meaningful data to support recommendations that improve the customer experience. Rather than fixating on a 2% drop in conversions from one day to another, consider committing to improving your product or service level by 2% or more.

And above all, don’t forget to step out onto the porch to get a feel for what’s happening beyond “the state of now.”
Think Differently for a Better Customer Experience

By Stephen Pappas

Below are 10 ways for you, your agents and employees to align on some strategies and tactics for providing customers with the best possible customer experience.

1. Think Outside In

We've all heard the adage “Think outside the box,” but to execute on that critical thinking, we need to bring these ideas in-house and actualize them. As you move towards a more customer experience-oriented model, think all the way at the customer point and work your analysis to the in-house operations.

2. Capture All Customer Feedback

Keep a pad of paper at each customer touchpoint (e.g., main phone, desk, computer) and capture all questions, praise, complaints and concerns. Go over all feedback with your staff and decide how you will grow as a team. Create a job aid for this feedback-gathering activity, which is segmented by categories, so folks actively participate. You can then prioritize the list by what types of things make the biggest difference to implement immediately.

3. When Things Go Wrong or Right, Capture the Context

Context, as they say, is everything and things rarely occur in a vacuum. Learning how to see the context can help your staff see the whole picture and learn from mistakes as well as successes. Both are veritable treasure troves of learnings for those who know where to look. It is not merely about capturing the event but the circumstances around the event itself. Think about all of the parameters, almost like a recreation after-the-fact. Try to capture the soft skills used, the systems or technology navigation as well as the process that was used.
4. Develop Product and Service Know How in All Employees

Encourage employees to participate in meet-ups and join associations to network and build product knowledge deeper and faster. Ensure they get a multi-faceted perspective and have them attend trade shows, so they can see how other companies do it and mingle with potential customers. Strive for every employee to be a knowledge ambassador. Imagine if the customer asked any one of the employees a question, they would expect some knowledge. Continuously add to every employees’ mental knowledgebase.

5. Take Your Own Tour

Fire up the video player on your smartphone and document the experience from the lens of the customer—figuratively and literally from the outside looking in (drive by, parking lot) to what it is like inside (greeting, decor, culture). For online companies, use screen capture. When you are done, play it back and take notice of everything (slowly), and then act on it to make things better.

6. From Tour to Feel

As you play back the video, make sure to engage your senses. This can be a very powerful visual tool, but it’s not just the visuals we need to think about. Every customer is different. Some are certainly visual (see) others are tactile (touch) and then some are kinesthetic (movement) and finally, auditory (hear).

- What did you see (good, not so good)?
- What did you hear (music, chatter, clanking, street noise)?
- What did you smell (pleasant, distasteful)?
- How did you feel (good experience or bad)?
- Was there unexpected movement?
- Are your customers able to experience your products via touch?

Are you helping your customers’ experience based on the types of learners they may be?

7. Interaction or Transaction

Think through both your business transactions and interactions (from inquiry to quotes to requirements gathering/matching):

- Are each as simplified and frictionless as possible?
- Are each as pleasant an experience as possible?
- Are each as expedient as possible (keep in mind your customer’s time)?

8. Avoid Tech for Tech Sake

Tech should provide the business with the right infrastructure to benefit the customers or make employees more productive to benefit the customer. #Tech for Customer.

9. So Many Channels

Today more than ever, our customers have more choices in how, when and where they would prefer to interact with your brand. Developing an Omnichannel strategy based on where your customers are is a beneficial business move.

- Are you meeting the customer where they are through an Omnichannel strategy?
- Are you thinking about their experience via each channel?
- Make the message consistent across all channels.

10. Give Customers a Seat at the Table

As you plan, keep your customer in mind at each step. Ensure your employees look at everything through the lens of the customer and lastly, lead by example.
The One Thing You Need for a Great Customer Experience

By Jeff Toister

Here's a test.

Try asking a random sample of employees in your company to describe an outstanding customer experience. You'll probably get a lot of great answers.

It's likely you'll also get a lot of different answers.

Creating a terrific customer experience is difficult without internal agreement. Even executive leaders have different opinions about what the ideal customer experience looks like.

My research into customer-centric companies reveals one theme that sets the elite companies apart from all the rest—the top companies unify their employees with a single customer experience vision.

WHAT IS A CUSTOMER EXPERIENCE VISION?

A customer experience vision is a shared definition of an outstanding experience that gets everyone on the same page. It often serves double duty as the company's mission or corporate vision statement, since customers are the customer-centric organization's reason for being. Executives often have big ideas about how they want customers to feel about their brand. A customer experience vision helps leaders get those ideas out of their brains and share the core focus of the company with everyone.

One of my favorite examples comes from the outdoor gear retailer, REI. The company's customer experience vision (and mission statement) is: At REI, we inspire, educate and outfit for a lifetime of outdoor adventure and stewardship.

Simply put, the entire REI customer experience is built around helping customers enjoy the outdoors. Product selection, store layouts, generous return policies, adventure classes, and everything else are focused on promoting an outdoor lifestyle.

ABOUT THE AUTHOR

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WHAT A CUSTOMER EXPERIENCE VISION DOES

The vision should articulate exactly what you hope to do for your customers, so everyone can clearly understand. Customer-focused companies reduce internal friction by aligning key processes with a central vision. Examples include:

- Product design and delivery
- Goals and metrics
- Resource and budget allocation
- Employee hiring and training
- Messaging from leadership

On a tactical level, the vision should guide employee decisions. For example, a customer experience vision can help a product development team prioritize which new features to add and how they should look and feel. Or a customer service employee can decide how to serve a customer when encountering a tricky situation where there isn’t an established procedure.

HOW TO CREATE A CUSTOMER EXPERIENCE VISION

Writing a customer experience vision statement should be a straightforward process. Start by making this a team effort. You want to involve your employees in writing the vision, so it will be authentic and meaningful. Visions often fail to become widely adopted when leaders make up the vision on their own.

When I help companies create a vision, we typically invite all employees to share input via a survey and then gather a cross-functional team of 7-10 people to do the actual writing. The meeting itself typically takes about two hours. (You can use this step-by-step guide to walk you through the entire process.)

A good customer experience vision adheres to three criteria:

- It's simple and easily understood.
- The vision is focused on customers.
- It accurately reflects the company now and the company's future aspirations.

Let’s go back to REI’s vision and you can see evidence of all three: At REI, we inspire, educate and outfit for a lifetime of outdoor adventure and stewardship.

Finally, you want to make sure all employees know and understand the vision, so it can guide their daily work. Each person should be able to answer three questions:

- What is the customer experience vision?
- What does it mean?
- How do I personally contribute?
Transform Customer Service into a Customer Insight Machine

By Jeremy Watkin

I've spent most of my professional career in a contact center and can attest to what we customer service operations folks are great at:

• We excel when it comes to putting enough people in seats.
• We are terrific at putting our heads down, mowing through a call queue, or busting out mass amounts of support tickets. (A former colleague termed this a “ticket headache.”)
• We love to connect customers, who have a problem, with the right solution.
• We strive to increase our efficiency, constantly working to improve our KPIs—and likely a bunch of other stats we track.
• We are good at measuring the quality of each interaction, making sure all the boxes are checked.

These are all good activities, right? As I review them, they also seem rather exclusive to the customer service department. What value are these activities providing to the rest of our organization?

SHARING VALUABLE CUSTOMER INSIGHT

Customer service teams spend the lion’s share of their time interacting directly with customers and therefore, possess a treasure trove of knowledge other departments could surely benefit from. Marketing would love to know sooner than later about the ad that was offending customers. The UX team would prefer to quickly fix an issue, instead of having customer service send multiple emails to customers that containing a certain workaround.

Clearly, a head-down focus on getting support-related activities done has its inherent flaws. What if there’s a better way—a way where the customer service team regularly shares valuable CX insights with the rest of the organization? Here are two straightforward practices customer service leaders could benefit from implementing now.
DO A QUALITY ALIGNMENT CHECK

I once heard someone say that quality assurance measures how well customer service meets the company's expectations, and customer satisfaction (CSAT) gauges how well the service meets customer expectations. Eager to see how aligned our expectations were with customers, we did a study at FCR where we compared our quality scores for each of our programs with customer satisfaction. Both were measured on a scale of 0-100%, which made for an easy apples-to-apples comparison. This might not be as easy with an NPS score unless you take the average of the 0-10 rating, instead of the actual NPS calculation.

For some teams, CSAT and quality scores were within a few percentage points of each other. There were, however, other cases where quality scores were 95% or above and CSAT was lower by 10-20%. In layman's terms, this is the equivalent of saying that our customer service is awesome, but our customers are only happy 75-85% of the time. I implore you to find any executive whose happy with a CSAT rating between 75 and 85%.

It can be tempting to look at this gap between quality and CSAT and blame it on issues with a policy, the product itself, or another group in the organization. While there may be some truth to this, it's a better use of everyone's energy to look for opportunities within the control of the support team to positively impact CSAT. This might include a retooling of the quality process to drive the right behaviors on each interaction or an initiative to help your agents get more comfortable with great service. Here's a recipe that can help. One simple change we're making at FCR is adding a CSAT question to our quality forms and asking supervisors to put themselves in the customer's shoes and rate the interaction. This is helping them be mindful of and coach to the bigger goal of making sure the customer is satisfied.

BUILD YOUR LAUNDRY LIST OF CUSTOMER EXPERIENCE ISSUES

There are also issues that impact CSAT that are totally out of the control of your agents. Washing your hands of these issues and saying, "Not my problem," or blaming another department won't cut it. We need to be a part of the solution.

When I was with Phone.com, we had an executive team that not only understood, but expected that customer service would have a laundry list of issues that negatively impacted the customer experience. Our engineering team reserved time during each sprint to prioritize customer experience issues that weren't being addressed by other projects. Having this list of top customer issues was no small feat, either. You need to know two things to build your list:

KNOW WHAT THE ISSUES ARE IN DETAIL

To know what the issues and insights are, we had to pull them from a variety of sources. Here are some items to consider:

- Have your quality assurance team track issues that arise as they review interactions. They are already reviewing the interactions anyway, right? So, have them think about the customer experience while they're at it.
- Regularly review interactions to keep your finger on the pulse of what customers are saying.
- Conduct roundtable discussions with your agents to get the full picture of what’s happening and what’s frustrating to them and customers.
- Read what your agents are saying every day in Slack (or whatever your team uses for group chat).
- Review your disposition reports to know top reasons customers contact you.
- Use speech and text analytics for more insight into all of your interactions. I wrote about this a couple of months ago.
- Regularly review customer survey feedback and close the loop with customers.
- Look at the reasons people give when canceling service.
KNOW THE IMPACT OF THESE ISSUES

You need to be able to quantify the impact of these issues and the associated costs. Here are a few things to consider:

- Understand how many support interactions are caused by each issue. If you know your cost per contact, you can estimate the support costs for each issue.

- Know how many customers are canceling service because of an issue. If your company tracks a cost per acquisition or customer lifetime value, you’ll know how much it costs to replace the customers you’re losing.

- Determine how many customers are dissatisfied because of the issue. This allows you to show the impact to customer satisfaction, which is likely a company-wide KPI.

When you have a complete understanding of the top issues and their associated costs, you can then partner with other departments to prioritize and get them fixed.

By checking your alignment between CSAT and quality, you’re first shifting the focus from checking boxes on a quality form to coaching and empowering customer service agents to do the things that are within their control to improve the customer experience. For things outside their control, your list of customer experience issues and insights serves as a valuable guide as your organization prioritizes improvements. In doing so, the customer service team is transformed into a critical, valuable contributor to the organization’s customer experience efforts.
Conclusion

As customer experience influencer Greg Ortbach states, “Customer service is what connects the dots between the brand promise and the customer experience,” and this theme resonates throughout the articles in this collection.

Once you have grasped the lessons and strategies presented here and implemented them into your organization with some success, be sure not to rest on your laurels or be a one-trick pony to your customers. Customers need to know you are committed to these improvements, as do your frontline agents. As Megan Burns so accurately states, “People need to trust that what they saw once or twice wasn’t just a fluke—rather, it’s a more accurate view of reality.”

So, we implore you to take these nuggets and mold them into your own and then deliver the goods to your customers and agents and then do it again and again—until every customer is satisfied and every frontline agent loves coming to work.

Thank you for reading our e-book.