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CX 2020

The Top Eight Trends Shaping the
Future of Customer Experience

GIG SERVICE MODELS: THE TALENT OF THE FUTURE TO BEST SERVE YOUR CLIENTS

DISCOVER THE INSIGHTS!



CX insight

AN EXECS IN THE KNOW PUBLICATION

CX insight Magazine

Issue I, January 2020

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in this issue

05 GIG SERVICE MODELS

The Talent of the Future to Best Serve Your Clients

09 CX 2020

The Top Eight Shaping the Future of Customer Experience

15 BEYOND EXPECTATIONS

Setting a New Standard in CX

20 WHY CUSTOMER ENGAGEMENT IS CRITICAL FOR MODERN BUSINESS

24 HOW BIG DATA IS IMPACTING THE ROLE OF THE CX EXECUTIVE

30 AN EARLY LOOK

Corporate Trends and Insights



A New Year, A New Publication Just For You

Welcome to our first quarterly Execs In The Know Magazine publication – *CX insight*. We are so excited to deliver this to you, our community of CX leaders.

It has been months in the making – diligently listening to trending topics in the Community, at events, in webinars, and general discussions. Our goal is to pull together pertinent information you can use in your leadership roles - doing the footwork to gather insights and information under a single cover and making it available online and in a downloadable, printable format.

So, take a look! We have some great articles in this issue covering 2020 predictions, the gig economy, data and analytics, agent engagement, diversity and inclusion, a leadership interview, and more!

Welcome to *CX insight*! Have a story idea? Submit to info@execsintheknow.com. Want to get this publication in your inbox? [Subscribe here!](#)

Gig Service Models

The Talent of the Future to Best Serve Your Clients

The gig economy continues to gain a significant share of voice in the news, in online discussions, and at our customer experience (CX) events. Rightfully so, due to its great promise and allure as an effective, flexible, cost-effective approach to serving customers. This rapidly growing CX service model has leaders actively exploring it as an intriguing service alternative. However, it is clear there is still some looming fear, uncertainty, and doubt.

While the early adopters of the gig model can attest to some clear benefits and tout some early success for specific applications, a majority of companies have yet to tap into this ever-growing talent pool due to a lack of understanding, hesitation about where to begin, or simply fear of what could go wrong.

Adopting a gig model requires you to fundamentally evaluate everything – it's the newest disruptor to the traditional CX service delivery model. Despite a number of unanswered questions, leaders remain hungry to understand gig's place within CX. We've laid out some of the most common options leaders would benefit from investigating the gig model. Let's begin with the most fundamental question.

How Do We *Define* the Gig Economy for CX?

Perhaps the best way to provide clarity to loosely thrown around buzzwords is to break it down

in CX terms. The gig economy is the economic model for CX to employ, while the pool of flexible workers within the gig economy is what we call gig workers. These are the workers who choose flexible, task-based work over traditional 9-5 office jobs at a rapidly increasing rate. To engage these gig workers, companies must consider how they integrate various service models into their mainstream CX operations.

“The gig economy really is less about customer service itself and more about where the talent of the future is going to be and how companies will tap into that talent to best serve their customers,” said Brett Frazer, Head of Customer Service at Sun Basket.

According to [Upwork](#), 51% of the US independent workforce would not take a traditional job for any amount of money. Additionally, 84% say they are living their preferred lifestyle compared to 54% of those in traditional jobs.

The most important takeaway to comprehend is that flexible workers are part of the gig economy by choice. They pick the brands they represent, the hours they work, and the type of work they perform. As it pertains to CX, companies can make the most of the gig workforce by gaining access to workers who are already fans of the brand, unbound by physical location, willing to work outside a traditional 8 a.m. to 5 p.m. workday, and easily scalable. Additionally, they come with a faster acquisition to production mode timeline and a very different financial compensation model, often pay by the minute or pay by the result.

There is an endless amount of service models companies can use when getting into gig, which is what makes gig appear to be complex, but understanding it actually turns complexity into an attractive option. When it comes to sourcing the right workers and providing the right platform, there are a few widely adopted options beneficial to both beginners and experienced practitioners within the gig economy.

The Gig Resource Platform Service Model

Advancements in technology and secure VPN capabilities allow work to be performed from anywhere at any time.

New technology capabilities have opened the door for new gig resource technology and service platforms such as Upwork, Limitless, and many others to make it easier for companies to find gig workers capable of handling the exact capabilities they need. These providers attract and retain a pool of gig workers, and through their technology, serve up knowledge and language assessment information, along with the ability to create a seamless service workflow.

When you invite gig workers with the right attributes and passion for your brand to perform task-based work, you can connect them to your digital channels through APIs or use the platform tools available to manage the project. With some vendors focused specifically on CX, you can lean on the platform's technology to resolve or route calls to qualified agents. Frazer discussed his company's successful relationship with Limitless and explained how they streamline the process of tapping into gig.

“I work with Limitless to identify the customers we want to invite to join the platform, however, that platform is owned by Limitless and those who elect to join are independent contractors with Limitless,” said Frazer. “They have no direct affiliation in this work capacity with Sun Basket.”

“In our growing of the company, we looked at ways for existing customers to help customers in our retention model. Our retention model was very phone heavy, and gig and phone really haven't been able to merge very well yet with some of the technology. I liked many of the technologies Limitless was talking about when it came to gig and how they focused on providing a way for people to make a career out of customer service,” said Frazer.

By partnering with a gig resource platform service provider, companies can hand off management time-intensive tasks of the talent recruitment, training, and compensation with the added benefit of limitations in liability.

Lisa Oswald, SVP of Customer Service at Travelzoo, has been able to rely on Upwork to handle her company's gig work.

"We trialed the Upwork platform in May 2019, shifting from a traditional staffing agency to the freelancing site to hire a dedicated team for full-time contract work," said Oswald. "There's no difference in the way we manage our gig team or any other on our payroll. We apply the same quality assurance processes, set the same performance targets, offer the same pay for performance incentives - and just as important, communicate on the same frequency."

These new platforms help solve the problem of having to follow traditional time-consuming methods to find consistent, reliable gig workers that are a good fit for a company to perform a particular service. Whether it's your first dip into the gig pool or your 100th, these resource platforms make it easy to quickly connect and ramp up with the right gig workers.

The Gig Outsourcing or Virtual Call Center Service Model

For companies looking for a turnkey solution, outsourcing remains a sound option within the gig economy. A full-service outsourcing model using gig workers lends itself to a full spectrum of gig benefits with the added confidence of traditional outsourcing services. This model allows a company to bypass the gig learning curve and retool to accommodate the nuances of gig.

A gig outsourcing service model opens the door to even more flexibility and greater access to different talent structures by either incorporating a pure gig workforce managed service, or by building a hybrid model to seamlessly leverage both traditional brick and mortar workers and

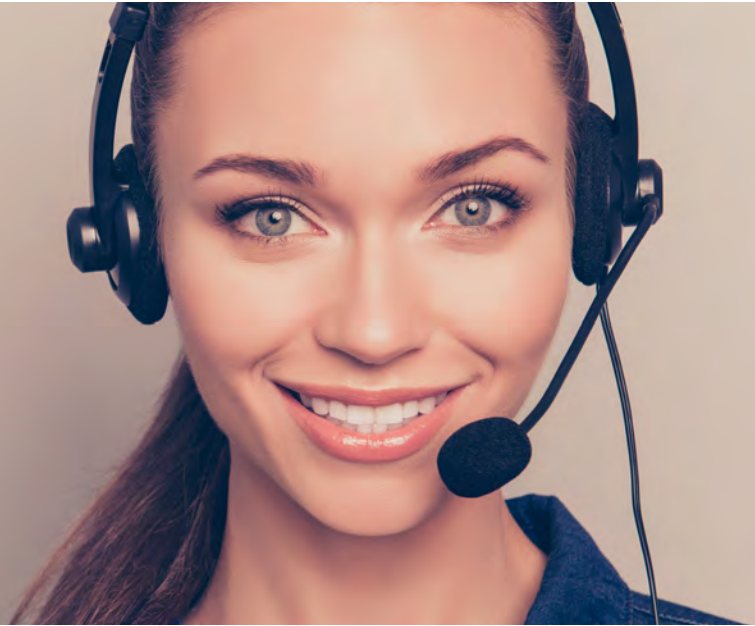


gig workers. In some cases, these outsourced or virtual call center service providers act as the middleman, outsourcing to either independent gig workers, a micro call center company made up of incorporated independent work-from-anywhere gig workers, or to multi-agent call center companies.

"You have to break your mindset up," said Frazer. "You have less control over your volume handling in a gig environment than you do in an outsource environment."

This model also opens the door for sourcing diverse talent from around the world, different languages, different skill sets with more input and control over training, background check clearances, and even the tools they use. Oswald pointed out how gig "gives us access to talent unbound by geography, people who can work around the clock to support our global business at very competitive labor rates."

The gig outsourcing or virtual model also allows for efficiency in an integrated approach. This includes a gig model to handle the definable, routine calls with escalation to the more seasoned



office-based worker across the globe who handles the more sensitive, culture-dependent, or complex calls. This model is great when you need to accommodate seasonal spikes in call volume, service a global customer, and when more control for security or training is needed.

Custom Service Model

While advancements in technology have created platforms with the ability to connect data to view all work being done across gig workers and outsourcers, some companies feel comfortable enough plugging in gig workers through their own service models.

The process is a thorough undertaking that likely becomes more prominent in coming years. Unlike outsourcing or resource platforms, building an in-house gig model requires specialized knowledge in terms of acquiring and managing independent contractor talent and the legal nuances that come with it. This avenue requires agents to have access to the proper training materials and tools to ensure they feel they can confidently perform the work and earn an honest income while maintaining their highly desired independence.

Choosing a unique, do-it-yourself type of service model doesn't have to be complicated. Companies can even choose to rely on organizational alumni networks, former full-

time skilled workers looking for flexible work, or professionals looking for a side hustle.

According to a [Mavenlink report](#), nearly half (47%) of respondents reported they are in the market to hire gig workers to fill management and senior executive roles, including C-Suite level positions. It isn't uncommon to hire flexible agents with the intention of keeping them long-term and eventually developing them into higher-level pillars of the company.

Are You Ready to Get into the Gig?

Technology's improvements have lowered the barrier for entry into gig. CX executives have a goldmine of talent and resources available, provided everyone knows where to begin, and which service model is the most feasible.

If you are reluctant to get into gig for agent services, these models aren't restricted to call center agents, either. Some of our community members are testing the waters using gig workers for secret shopper services, data entry, outbound calling, and other specialized routine tasks.

With a new decade upon us and a gig workforce growing by the day, there is no better time to examine service models and explore how to best reach the ideal flexible workers to in turn provide the customer with the best possible experience. 🧩



CX 2020

The Top Eight Trends Shaping the Future of Customer Experience

By Lauren Kindzierski & James Waite of HGS

In 2019, the customer service industry continued to see the rapid growth and expansion of automation, Artificial Intelligence (AI), and analytics. These game-changing technologies, when paired with the already popular and expanding self-service, chat, social, messaging, and other digital channels, are driving more digital transformation that is focused on both the customer and agent experience.

The difference today - in 2020 - is that it is no longer about why it's important to invest in CX initiatives; rather, the conversation is around how much investment and in which areas should be invested. Companies are starting to secure more investment in CX initiatives due to AI, automation and analytics helping to prove out

business cases, usually positioned as cost savings due to better operational efficiency. In addition, many of the historical 'silos of data' problems will start to get resolved as customer data platforms (CDPs) become more prevalent, and give CX professionals a 360-degree view of the customer for better personalization and insight into the customer journey. Finally, in 2020, expect smarter and faster technology, bundled with a delivery capability that is packaged as a service or takes a total cost of ownership approach, making sophisticated solutions easier to try.

So what should you expect to be talking about with your peers and service providers this year? These are some of the hottest emerging customer experience trends affecting our industry:

Customer Data Platforms & Journey Analytics for a 360-Degree View

There is no doubt about it, customer engagement is fueled by customer data. But, an understanding of customer feedback does not reveal everything about customer experiences. To get the full picture, customer service needs to understand customer behavior across channels, web activity, purchase and return history, marketing offers used, and more. However, many customer care leaders feel defeated today because data resides in multiple systems and platforms that are not integrated. The answer is to create a CDP and combine it with customer journey analytics, thus creating a unified 360-degree view of the customer. In 2020, CDPs will give customer care and marketing teams the ability to finally track the history of a customer to deliver hyper-personalized messages, extend tailor-made offers, recommendations, and predict future needs.

Artificial Intelligence (AI) & Automation That Enhances Live Agent Support

The customer service industry has always been burdened by costly labor attrition due to the repetitive tasks some contact center agents are faced with on a daily basis. AI and machine learning technology can enhance live agent support and help overcome this industry-wide problem. In the last two years, the industry has discovered that the real value of AI and automation is in the agent experience. When deployed, this technology can help agents do the majority of the heavy lifting. For example, AI can predict the right response to a customer inquiry in any digital channel. AI and automation can also help agents find the right answer quickly, populate the right screens at the right time, reduce the number of clicks, or even present personalized cross-sell offers at the perfect time in the customer-agent dialogue. In 2020, these new customer care solutions will bring together the empathy of agents with the efficiency of bots,

thus producing an amazing (and cost-effective) customer experience.

The Rise of the Flexible Workforce and the Gig Economy

There are a lot of buzzwords flying around the industry related to what is ultimately flexible working, including “work-at-home,” “the gig economy,” and “crowdsourcing.” Benefits exist for all parties involved. For companies, it allows for greater flexibility in staffing, pay is contingent on the completion of an outcome, and employees are independent contractors, thus making attrition much lower or nonexistent. For the flexible workers, they are called upon when needed and can accept or decline based on their lifestyle or financial situation. Lastly, for customers, the flexible workforce can be used strategically to help staff the hours that were previously difficult to fill, thus reducing customer wait times. There is, however, contention surrounding the gig economy in three major areas: customer data, security, and compliance. As a trend for 2020, we can expect brands to draw on the gig economy; however, the industry will remain cautious not to go all in and instead supplement existing contact center operations.

Business Process Outsourcers (BPOs) Rethink Business Models

Twenty years ago, outsourcing was a phenomenon. It meant that companies could dramatically decrease their operating costs, using low-cost labor and a telephone. However, as consumers’ expectations have dramatically shifted when it comes to CX, it quickly became apparent to brands that their customers will no longer tolerate poor experiences. The challenge is that companies procuring BPO services still think of those connotations to the word “outsourcing” and will nearly always go to market with a request for proposal (RFP) for a “call center provider,” awarding the business to the lowest price bidder. The sad reality is that it has reached the point where it has become unsustainable



and bad for customers. Today, and going into 2020, the customer service industry will witness BPOs disrupting traditional business models by becoming more creative with their value propositions, technology innovation, and pricing – such as a total cost of ownership (TCO) approach, gain-sharing models, or contractual incentives focused on driving value using innovation.

Mind Blowing Social Media Customer Experiences

Today, a new generation of digital natives – Gen Z – is turning to social media for help and expecting more than just a response. They expect a mind-blowing CX. The challenge is many brands are seeing a growth in social volume year after year, and yet staffing levels remain the same due to limited budget and resources. Many brands have mastered the basics of simply responding to customers, but now brands are starting to take social care to the next level by leveraging a powerful combination of AI, automation, bots, analytics, and the human touch. AI is helping to filter out the non-actionable posts, leaving only the engageable messages. This pool of messages

can now get prioritized using AI, in order of most important. Automation then routes the right post to the right team. These teams are better trained in responding and resolving issues in-channel using a creative brand voice. In the end, it results in what we all want – more shares, comments, retweets, and a positive brand reputation.

The Power of Partnerships and Mergers and Acquisitions (M&As) for the Complete Digital CX

As fast-growing disruptive companies enter the market and steal market share away from long-time traditional enterprises, it is forcing companies to rethink the way they do business. This places a priority on providing effortless, digital, and mobile-first customer experiences. The challenge is that large enterprises cannot move as fast as a small startup, and time is money. The slower they move, the higher the customer churn. The solutions many brands are pursuing include traditional partnerships, outsourcing relationships, or an M&A with companies that can bring the digital intellectual property (IP) and the talented resources behind it (such as data

scientists, developers, AI and machine learning engineers, and cybersecurity engineers). In 2020, we will continue to witness consolidation happen within our industry, as well as more partnerships strategically designed to transform CX.

Investment in Data Privacy and Security Increases and, In Turn, Affects the CX Industry

According to Risk Based Security (RBS) research published in the 2019 MidYear QuickView Data Breach Report, there were “more than 3,800 publicly disclosed breaches in the first six months of 2019 exposing an incredible 4.1 billion compromised records.” Whether hackers took data from a corporate server, an insider stole customer information, or information was exposed on the company website, it is important brands have a plan ready to execute. In a breach situation, the top priority is to assemble a team of experts, including legal, information security, IT, operations, communications, investor relations, and most importantly – customer care. In 2020, take necessary steps to build out a plan that could help minimize any reputation damage in the event a breach occurs. A contact center team’s ability to de-escalate anxiety and to lessen customers’ fears will be crucial to reputation preservation efforts and, more importantly, rebuilding customer trust and loyalty. Partnering to focus on compliance, accurate reporting, and safeguarding customer data are going to be critical in 2020 and beyond.

Digital Transformation with Customer-First Thinking

In the past couple of years, we’ve witnessed many companies buying advanced technology based on all the benefits it can deliver. Information Technology (IT) and operations departments are too often implementing this software without collaborating with customer-facing teams, conducting meaningful pilot tests, or taking the time to fully understand the impacts that IT changes could have on the customer. An IT-first

approach has taken hold, resulting in the trending of a fundamental problem – it’s impossible to digitally transform CX without customer-first thinking. This means that companies on the cusp of IT change are not first asking the critical questions of – (1) what does the customer want and (2) how can technology help make that happen for them? It’s obvious that IT-first approaches don’t build customer trust or relationships, they usually hinder them. In 2020, the CX trend is thinking more about the human, human nature, and its relationship to the machine – and less about the machine and its relationship to the cost base.

To learn more about these CX trends and others, please [register](#) for our webinar featuring industry experts Chad McDaniel (Execs in the Know), Ivan Kotzev (Nelson Hall), Simon Dillsworth (Ember), and Graham Brown (HGS) on January 23rd, 2020 or listen to the recording on demand.



Lauren Kindzierski
VP of Consumer
Engagement Solutions
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Head of Marketing Europe
HGS



HGS is a global leader in BPO and optimizing the customer experience lifecycle by leveraging AI, automation, analytics, and digital to deliver transformational impact to clients. Learn more at www.teamhgs.com.

MARCH 2-4, 2020

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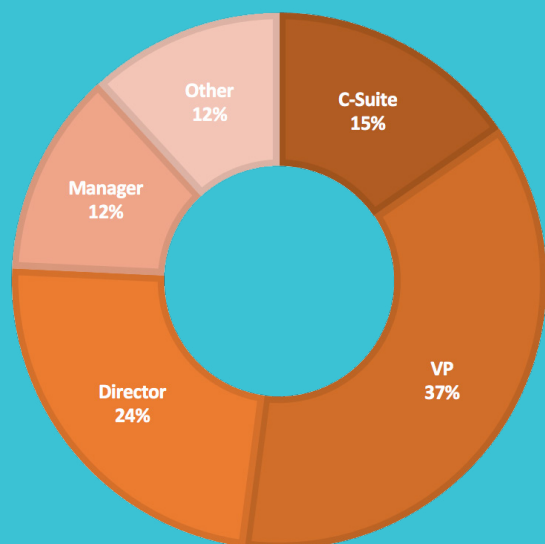
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Peer-led, intimate discussion groups designed to allow attendees to discuss and share strategies.

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EXPERIENCED ATTENDEES

Over 50% of attendees from the Fall Summit were VP-Level and above from brands excelling in CX

Beyond Expectations: Setting a New Standard in CX

KIA Online Community Member Spotlight: Brigitte Bailey



BRIGITTE BAILEY

Director of Customer
Experience and Solutions
Fulton County
Government, Georgia

*From an inaugural customer service vision memo to “secret shopper” quality assurance, online self-service, and frontline agent training programs, **Brigitte Bailey** has implemented a top to toe customer experience overhaul that’s resulted in customer satisfaction rates any CX professional would dream of. But Brigitte isn’t working for a beloved consumer brand. Instead, she’s the Director of Customer Experience and Solutions for **Fulton County Government, Georgia**.*

Over the past three years, Brigitte’s innovation has unleashed a string of highly successful process improvements that put Fulton County on the map for CX excellence. Here’s how.

Execs In The Know (EITK): In the private sector, customer experience is typically considered a key differentiator in an increasingly competitive marketplace. As the single-source provider for a wide variety of public services, what’s at stake for Fulton County in prioritizing CX?

Brigitte Bailey: I get this question a lot, actually! We’re extremely dedicated to providing the highest-quality customer service to our residents and visitors because we want Fulton County to be a place where people come to live, work, and play.

Our offerings are tremendously diverse. We issue motor vehicle tags, register voters, conduct elections, administer health and human services programs, and operate judicial systems, but we also offer voluntary services such as library and arts and cultural programs. Citizens engage with our brand on so many levels and in so many

aspects of their lives that it's vital their customer experience be a good one. They need to feel comfortable enough to reach out to us for a wide variety of services and know that they will be treated with professionalism, respect, kindness, and understanding.

For us, it's about building long-lasting relationships. We want people to feel pleased to do business with us and stay here. There's a lot at stake in terms of private-sector investment and economic development.

EITK: Over the past three years you've created a CX organization from the ground up. How did you go about getting started? What kind of support did you receive internally?

Brigitte: We have a great team of leaders with a very strong vision for where we want to go in terms of customer experience -- from our county Board of Commissioners to our County Manager and his executive leadership team on down. Without their buy-in and full support, my efforts would be futile. The first thing I did upon taking on this role was take a hard look at how we were going to get there. I created a Customer Service Strategic Plan that outlined what we needed to do to become more customer centric as an organization.

Second, I knew that in order to be successful we needed to establish a standard level of service. I drafted the county's first-ever Customer Service Policies and Procedures to set basic expectations for service and ensure that our services were actually tailored to meet customer needs.

Third, I realized that with these standards in place we needed to give our employees the tools and resources to meet them. I collaborated with our Employee Development Division to design our ASPIRE customer service training class. Since the program launched early last year, we've trained more than 1,600 employees.

Finally, if you're going to train your employees to uphold a high standard of service you need programs in place to recognize and reward

them. I now manage one of the county's largest recognition programs, called the Fulton 100 Customer Service Legend program. We've also begun honoring our employees during Customer Service Week, which is something we never did before we had someone thinking about customer service 24/7.

EITK: What CX programs and initiatives have you put in place and what have the results been so far?

Brigitte: I'm always looking for new ways to improve the service experience for our customers. Some of the programs and initiatives that have helped change the way we do business include:

Sending out "secret shoppers" to report on service quality. In the second quarter of last year I implemented the county's very first "secret shopper" program, in which a team of employees visit or call our various departments with realistic customer service scenarios and report back on their experience. It's a bit like the TV series Undercover Boss. Sometimes we'll intentionally send someone to the wrong department to see if the employee goes the extra mile to redirect that person or picks up the phone to find out the necessary information for them. This has really helped us assess the quality of services we provide and determine if employees are following established procedures. More importantly, it provides an avenue for constructive feedback that enables us to continuously improve the mode or manner of service delivery.

Conducting "pain point workshops" for business partners. Sometimes in government there's a tendency to do things a certain way just because that's the way we've always done them. In the third quarter of last year, I set up "pain point workshops" for the departments that requested them to help identify perceived operational deficiencies from the partners' point of view. Our processes must evolve along with our policies. If we can streamline a process by five or six steps that means we can speed things along for our end users as well.



Building an information and service hub within our Government Center. I worked with our Department of Real Estate and Asset Management to design and construct an information desk near the entrance of our Government Center. We had thousands of citizens visiting us each day, but we didn't have a central, dedicated space where citizens could stop and get service. Since the desk opened last year, we've served more than 19,000 citizens. Our customers love that they can often get served right at the desk without having to wander around trying to find the right department, and if they do need to be referred to a department for service, they know they're being referred to the correct one.

Overhauling the county website to put service first. Our old website, dating back to the early 1990s, was structured around departments. The result was that, for example, citizens looking for information on youth services might find information on the services provided our Health and Human Services department but not the youth services offered by any other department. I worked with our External Affairs and IT departments on the county's Website Revitalization Project, focusing on the service delivery aspects. The new site, launched in October 2019, offers many more options for online self-service, and information is organized by the services we provide, not the departments that provide them. The feedback we've received from customers has been tremendous.

Revamping the signage in our court building. I'm currently working with a cross-functional team to improve signage and wayfinding within the four-building complex that serves as our county court. It can be hard even for our employees to navigate. With improved signage we can help ensure that people aren't late to court or waiting in the wrong courtroom for their case to be called, which ultimately slows down the proceedings for everyone. We look to expand this project in the future to our Government Center and other county facilities.

Up next for 2020:

Rolling out kiosks to collect real-time data on customer satisfaction. Beginning with four of our forward-facing departments, we're installing kiosks that enable customers to instantly rate their service



experience at the end of each transaction by selecting a happy face, a not-so-happy face, a sad face, or an angry face. If we get a sad face or an angry face the customer can offer details, and we follow up with a further option asking if we might be able to contact the person for more information. We want to know immediately what happened. This real-time data will enable us to track and manage our performance, fluctuations in service level, and possible causes for poor performance, as well as validate any recommended improvement actions.

Implementing new employee training programs for handling customers with disabilities. I've been working with our Diversity and Civil Rights Compliance department, which houses our Americans with Disabilities division, to develop a customized customer service training program that focuses on managing service delivery for our citizens who are disabled. We need to be able to offer them the same level of service we offer to everyone else.

EITK: That's a lot going on! How do you measure success and customer satisfaction?

Brigitte: We conduct an annual County Residents' Survey, which gathers customer satisfaction ratings on the availability and quality of the services we provide throughout the year. Since

the survey's inception in 2016, I'm very pleased to say that our customer satisfaction rating has averaged around 83%.

I also worked with our Strategy and Performance Management Office to establish a set of customer service performance measures for each of our departments and created customer satisfaction surveys to send out to the citizens that interact with those departments. Customer satisfaction ratings on these surveys have topped 90%. That particular program earned a national achievement award from the National Association of Counties.

Those numbers are no small feat for a government organization of this size. That's how we know we're on the right track. We do a lot of work behind the scenes to make our customers whole experience better, and it's paying off. 🌟

For more Q&A interviews like this, join the Execs In The Know [Online Community - "KIA"](#) to access public and member only Q&A interviews and more.

EITK's Online Community - "KIA" is an exclusive online community for CX Leaders to collaborate and innovate. [LEARN MORE](#)

2020 CALENDAR *of* EVENTS

March 2-4

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Customer Response Summit

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Hollywood, FL

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Margaritaville Beach Resort



April 16

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Data & Analytics Briefing

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Dallas, TX



June 10

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Outsourcing Briefing

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Minneapolis, MN

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Target Campus



Oct. 5-7

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Customer Response Summit

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San Diego, CA

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Hotel Del Coronado



Nov. 10

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CX Technology Briefing

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More Info Coming Soon



*Margaritaville Beach
Resort*

Hollywood, FL



Hotel Del Coronado

San Diego, CA

Why Customer Engagement is Critical for the Modern Business

By Edward Kowalski of Sutherland

For lasting brand loyalty, a strong customer engagement strategy is key. Customer engagement involves creating interactions that anticipate customers' needs and ensuring that they are supported at every stage of the buyer's journey. In increasingly competitive markets, it's critical for enterprises to build personal connections with their customers.

Many businesses view growth through the lens of new customer acquisition; however, customer retention is the backbone of any sustainable growth model. In fact, improving retention rates by just 5% can raise profits by 25% to 95%, according to [**Harvard Business Review**](#). Moreover, investing in new customers costs between 5 and 25-times more than retaining existing customers. Customer acquisition costs are higher than ever before, increasing by **nearly 50%** over the past five years for both business-to-business (B2B) and business-to-consumer (B2C) companies. Increasingly, customer retention is linked to effective customer engagement.



Why Is Customer Engagement Important?

Companies that prioritize customer engagement can increase cross-sell revenue by 22% and upsell revenue by 13% to 51%, according to [Constellation Research](#). A strong customer engagement strategy is no longer a value-add for your business; it's now mission-critical. Here are three ways that effective customer engagement provides value to businesses:

1. Ensures that your business is customer-centric

Customer engagement enables companies to find more innovative ways to meet customer expectations. According to [Salesforce](#), 89% of customers want companies to understand their individual demands and necessities. Additionally, 75% assume that enterprises will be able to predict their expectations. Customer engagement plays a critical role in customer experience management by creating a consistent nurture to feedback loop. For instance, some enterprises

include emails in their marketing automation workflows to assess whether customers have had poor user experiences. Other brands post polls on their social media channels to get real-time data about customer sentiment.

2. Builds human-centered brand relationships

Successful customer engagement goes beyond mass marketing emails with upsell calls-to-action. It requires brands to build relationships and experiences that are more human and authentic. To do this, they must put themselves in their customers' shoes to understand their needs, motivations and pain points. [Salesforce reports](#) that 84% of customers believe that being treated like a human, not a metric, is key to driving repeat business. An example of this in practice is writing custom responses to customers who comment on social media posts. Another approach is to highlight customer insights and experiences by posting user-generated content on a corporate blog - any tactic to make the brand experience more personal.

3. Fosters a seamless omnichannel experience

With more channels and opportunities to engage with customers than ever before, some companies make the mistake of spreading themselves across too many social channels – regardless of relevance to their audience. In contrast, others utilize too few channels, leading to missed opportunities. A strategic omnichannel approach is required. Organizations should only invest in channels that are driving engagement and value with their target audience, whether that is on podcasts, social media, SMS, or others. The goal for strong customer engagement is to make every brand touchpoint feel as seamless and low-effort as possible.

How to Build a Winning Customer Engagement Transformation Strategy

There's a disconnect between consumer and brand perception of successful customer engagement transformation. New [research from Targetbase Claydon Heeley](#) shows that 77% of consumers believe that brands are not effectively engaging with them. In contrast, 78% of marketers report that their engagement strategies are working. Enterprises must take steps to more effectively engage in customer relationship management. The following five tips can help your company build a winning customer engagement strategy that fosters brand loyalty:

1. Optimize for personalization

Customers are more than [twice as likely](#) to consider personalized offers to be important. For this reason, customer engagement is strongest when customer interactions are tailored to an individual's specific desires. This level of customization is now relatively simple thanks to the [impressive amount of customer data that enterprises generate on a daily basis](#). This access to customer data creates opportunities for organizations to determine which engagement tactics are most effective. Building out a customer



journey map is also helpful for analyzing customer behavior and crafting a tailor-made customer experience for each individual.

2. Keep context in mind

Context is key for a successful consumer engagement strategy. If brands don't use the right engagement channel in the right way or at the right time, their plans can easily backfire. For instance, an engagement campaign that's successful on social media may not perform well in an email. When deciding how to engage with customers, brands must consider the audience and timing for every campaign. For example, an awareness campaign with a goal to improve brand sentiment may heavily leverage display advertising to drive broad reach. However, a B2B lead generation campaign may focus more on LinkedIn ads and account-based marketing (ABM) to more effectively reach a very specific audience with targeted messaging and goals.

3. Eliminate silos

According to Salesforce, [73% of consumers](#) will dismiss a brand based on an inconsistent

experience across channels. To deliver the seamless experience that consumers are searching for, enterprises need to integrate data from each customer engagement platform into a single hub. For instance, [Petco implemented a customer relationship monitoring \(CRM\) tool](#) to automatically import social media messages across platforms into a single system. This allows Petco to ensure that no comments are missed and to improve the overall customer experience.

4. Leverage the power of artificial intelligence (AI)

AI applications, such as chatbots and virtual assistants, enable brands to drive real-time customer engagement. Additionally, as more customers begin to use new digital tools in their daily lives, they will expect brands to use them too. In fact, according to a [study on AI and the workplace](#), 56% of customers want to purchase from innovative companies that are leveraging AI and other new technologies. AI is beneficial for customer engagement because it reduces effort while increasing efficiency for both the brand and the customer. Chatbots are one of the more effective ways to efficiently improve the customer experience. You can download our whitepaper detailing everything you need to know about leveraging chatbots for business impact [here](#).

5. Determine key performance indicators (KPIs)

Before a campaign is launched, brands should identify success metrics, or KPIs, to evaluate impact. Real-time data gives companies insight into what customer engagement tactics are working and what needs to be optimized to drive more impact across the overall customer experience.

Companies should keep in mind that KPIs will differ across channels. For instance, a KPI for an email campaign might be a 5% click-through rate, while the KPI of a social media post might reach close to one million, based on previous benchmarks. KPIs and customer data can be analyzed using tools within experience

management software, which provide a holistic view of engagement performance. Consistent monitoring and analysis of customer engagement KPIs are critical to make smart, data-informed decisions.

Strong Customer Engagement Drives Exceptional Customer Experiences

[According to Gartner](#), 64% of people consider customer experience more important than the price of a product or service. [Forrester also reports](#) that businesses with a strong customer experience strategy have 1.7-times higher customer retention rates, a 1.9-times greater return on spend, and 1.6-times higher customer satisfaction scores. Strong customer engagement is vital to creating a great customer experience that cultivates loyalty and builds long-term relationships. With an engagement strategy in place, enterprises can provide their customers with unique, personalized experiences that give them a competitive advantage in the marketplace.



Edward Kowalski
AVP, Retail Strategy
Sutherland



Sutherland creatively discovers, humanistically designs, analytically develops, and seamlessly deploys digital customer experience transformation solutions. Learn more at www.sutherlandglobal.com.

How Big Data is Impacting the Role of the CX Executive

Not long ago, customer experience (CX) executives focused on straight forward KPI data like call volume and resolution rate, but as customer needs and technology have evolved - the role of the average CX executive has become more complex. As data has grown more advanced and it's coming from disparate systems, the pressure to cross reference this data and turn it into actionable insights has become stronger.

"Data analytics differentiates between causation and correlation," said Thomas Siebert, Consulting Director - Contact Center Strategy & Operations, TBS Inc. "When leadership fails to understand the difference between causation and correlation, they can't possibly improve performance as they don't understand the root cause."

Executives are investing more money into data and analytics in hopes of improving their bottom lines and generating better KPIs throughout their call centers. A recent [Gartner](#)



survey revealed that 75% of companies increased CX technology investments in 2018, with customer analytics serving as one of the biggest investments at 52%.

The ultimate goal of the increase in tech spending is to get a better overall understanding of the customer's needs and where their priorities are. With the right systems in place, it is easier than ever to address customer pain points using modern technology - but what good are these systems without the executive know how to collect and interpret the advanced information now available? When it comes to data analysis, how has the role of the CX leader changed in recent years, and what KPIs are being prioritized in 2020?

What Do We Make of All This Data?

One of the recurring topics of discussion we notice during Customer Response Summit sessions and within our Know It All community is how many organizations have data collection systems in place but were unsure of the best ways to utilize it to generate KPIs. It shows a dichotomy of how even though certain aspects of data

sourcing have withstood the test of time, (surveys, employee feedback, word-of-mouth reviews), there are emerging areas execs need to focus on such as social media data and web analytics.

Execs' scope of work has become wider due to emerging areas of data sourcing, but with advancements in data, companies simply have more information that supports the customer's pain points and all the available ways to fix them. Brandon Linton, VP at Marriott, touched on this subject and explained how Marriott's contact center strategy trickled into other silos within the company.

"In the past, we had many different data warehouses and reports (due to organization structure, increasing complexity, and acquisitions). Over the past few years, we have consolidated and enhanced the systems creating data (e.g. Workforce Management, Telephony, Case Management), and our data warehouse, data management tools, and reporting tools," said Linton. "This has allowed increased automation of data processing - not just in traditional analytics, but also in other departments around the company. These efforts have also made our

data more consistent and our reports easier to understand. We've used the capacity freed up from automation and management of redundant systems to begin experimenting with advanced analytics, for example, machine learning."

Data sourcing is the foundation of modern analytics strategies, and its place in CX isn't going anywhere. Gartner predicts that 40% of all data analytics projects will relate to some aspect of customer experience by 2020. As companies in all industries continue to take on a more data-driven mindset, the execs at the top have to think in ways they never did in past decades to make sure data is at the core of every CX solution from the call center on up.

Execs Can't Ignore Marketing's Place in CX

An exec who is well-versed in data analytics is not only a strong asset when it comes to CX, but in marketing as well.

Data-driven marketing solutions are leverages to personalize messaging, identify actionable insights, operate a multi-channel strategy, enhance experiences, and inform project improvements. Because of this, the modern CX exec must be tech-savvy enough to know how to leverage advanced marketing technologies to maximize overall impact, and empathetic enough to reach customers on their terms.

According to Econsultancy and SAP Customer Experience's [report](#), CX leaders invest in marketing technology to capture insights about customers more often than their mainstream counterparts. A strong CX leader in 2020 knows how to use modern marketing technologies to make the customer's experience more personal and engaging.

Execs who are able to make the leap from being [functional to strategic](#) are the ones who will provide the most value in 2020. CX practitioners who holistically look beyond just serving customers better and focus on strategic projects and initiatives backed by big data will have the leg up on the competition in 2020.



Humanizing Data to Benefit the Customer

Knowing how to control marketing platforms and data analysis are vital weapons at the modern CX leader's disposal, and these initiatives are best paired with an empathetic approach to the customer journey.

Having empathy plays right into predictive analytics, consumer psychology, and behavioral economics. To understand the customer's pain points and implement a better journey map, CX leaders must have more empathy than in years past while also learning to use data to evaluate what impact customers' emotions have on the buying process and the overall customer experience.

Technology created more touchpoints - thus, creating more pain points for the customer. Combining data analysis with an empathetic omnichannel approach becomes more important when customers have so many more ways of getting in touch with a company.

When we spoke with Siebert, he pointed out the KPIs he focuses on most often in 2020 - and



they aren't anything too far out of left field. "If customer satisfaction is low, and/or dissatisfaction is high, yet your QA is 87%, it means you are executing as required and customers do not like your policies, procedures and/or product," he added. "When this occurs, you can create a pain point document highlighting to your executive team which products/services are causing customers pain and why, and a recommendation to improve."

Siebert also champions First Contact Resolution (FCR) and Net Promoter Score (NPS), and overall quality (from an agent level) as pivotal KPIs in modern day CX. These KPIs, along with call lengths, escalations, and many others all shed light on the difference between causation and correlation to paint a clearer picture for executives when it comes to where they need to allocate their budget and resources for data.

Humanizing data to bridge the emotional gap nurtures lifelong, loyal customers who are excited to tell other people about your product. The CX leader who acts as a behavioral expert to get inside the customer's mind and analyze more advanced analytics – such as hovers and scrolls

– will be more equipped to handle the nonstop evolution of customer needs.

Dynatrace conducted a global survey of 800 ICOs and determined that 73% felt the desire for speed in digital innovation has put customer experience at risk. It represents an often-overlooked area of modern CX in the sense that too much focus on data and technology can easily make the human element feel less important. Empathy and behavioral analysis still remain at the core of an all-encompassing, data-driven CX strategy despite the uprising of new technologies and data sources.

To Summarize

The modern CX leader who is best positioned to thrive in the future knows how to incorporate soft and hard skills, remain flexible to keep up with emerging technologies, and add to his or her skill sets in ways past CX leaders never did. With a bevy of KPIs to prioritize, both old and new, data has never been more predictive or customizable than it is today. This gives 2020's CX leaders plenty of tools to arm their call centers with.

The chief experience officers of tomorrow will be even better at leveraging data and analytics to not only improve the bottom line, but to improve budget and resource allocation in-house all with the common goal of providing more value to the customer by anticipating and solving future problems. 🧩



Execs In The Know



JOIN THE **KIA ONLINE** *COMMUNITY*

Execs In The Know's exclusive, private online community where CX Leaders from top consumer brands work together to solve current challenges, build new strategies, and position for the future.

90%

feel comfortable reaching out to community members privately for help.

85%

of members agree that community content and member input can significantly improve the quality of their work.

● WWW.COMMUNITY.EXECSINTHEKNOW.COM ●

ABOUT KIA

CX Leaders are hungry for new ideas and approaches that consumer brands are leveraging right now to transform the customer experience. Know It All (KIA) empowers its members to crowdsource and connect with other top executives in a collaborative, non-competitive environment to solve CX challenges within their own organizations.

How the KIA Community Can Help

Break out of the silo. Many CX Leaders bump up against organizational siloes that block them from building on the learnings of teams within their own companies. Bust the "bubble" effect through open conversation with CX practitioners from a wide variety of sectors, disciplines, and organizational perspectives.

Fast-track C-suite buy-in for CX improvements. It can be hard to get the mindshare, budget, and buy-in to shift to more innovative and transformative opportunities. Find out what's being done successfully at other top brands to build your strategy to cut through the red tape.

Make better-informed decisions. CX leaders are looking for concrete information as they consider CX-related improvements. Learn from KIA members who have already taken similar actions and have experiences to share.

Gain insider information on prospective vendors. CX Leaders are inundated with sales pitches from prospective vendors, and it can be challenging to determine which solutions will help them achieve their organizational goals. KIA's CX Marketplace will provide corporate brand only access to valuable peer insights in a candid, no pressure to buy environment.

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OUR ONLINE COMMUNITY FOR CX LEADERS

BY THE NUMBERS

85%

AGREE THAT COMMUNITY CONTENT AND PARTICIPATION CAN "SIGNIFICANTLY IMPROVE" THE QUALITY OF THEIR WORK



CONSUMER BRANDS REPRESENTED CONTROL \$850 BILLION IN ASSETS

90%

Say they feel "very comfortable" reaching out to other members privately for help

ARE YOU A CX LEADER?



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Customer Experience Management Benchmark Series 2019 Corporate Edition Executive Summary

An Early Look Corporate Trends and Insights

Since 2012, Execs In The Know has partnered with COPC, Inc. to compile the hottest, industry trends, year-over-year insights, and advanced data in the form of the Customer Experience Management Benchmark (CXMB) Series.

With three different installments – Corporate Edition, Consumer Edition, and Vertical Insights – nowhere else will you find this level of actionable industry insights and trends all in one place.

We are pleased to give you a sneak peek into our upcoming release of the Corporate Edition – scheduled for full release in March at our Customer Response Summit Event in Hollywood, Florida.

This year, we introduced several new questions in the Staffing and Technology sections.

In the Staffing section, we added a question on the utilization of “Gig Agents,” and another that

examines the deployment of “universal agents” – that is, agents capable of handling a wide variety of issue types.

In the Technology section, we added questions aimed at understanding the corporate objectives of artificial intelligence (AI) deployment, along with follow-up results for many of the AI-related questions introduced last year.

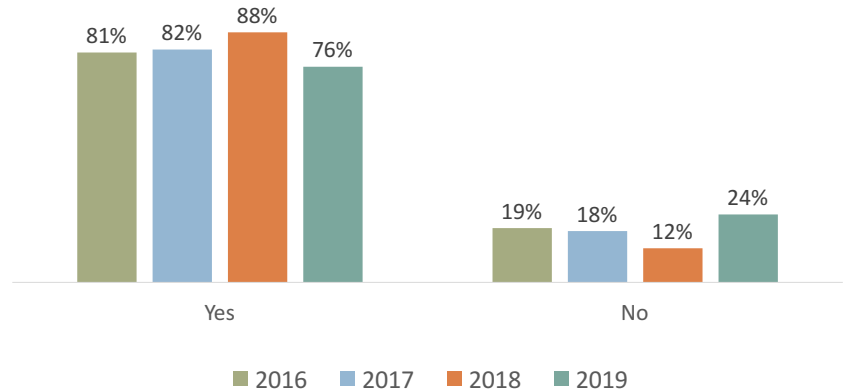
We’ve also added a special section devoted to comparing results from the 2019 CXMB Series Consumer Edition (released in September 2019) and the latest Corporate Edition results. By comparing the Consumer Edition and the Corporate Edition results, the CXMB Series provides readers with a unique and powerful set of insights.

Get your sneak peek now, and if you want to get the first look at the full version – **[attend our Customer Response Summit.](#)** ✕

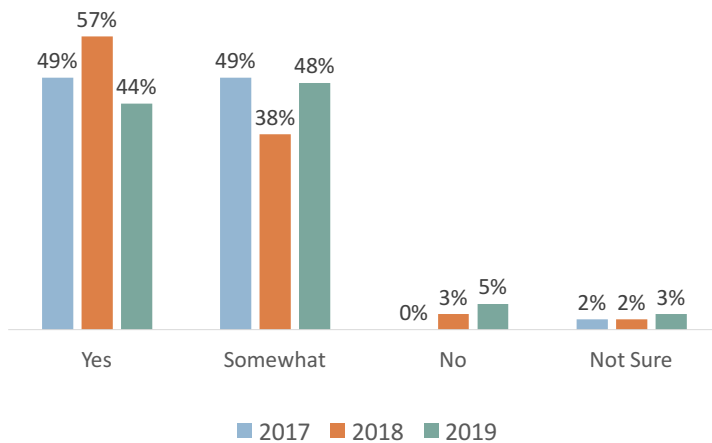
Shifting Industry Focus

Since 2014, CXMB Series Corporate Edition survey participants have been asked the question at right. At only 76%, the result from the 2019 survey is the lowest affirmative response ever seen in the data. This result could be due to the constant change within industry (and among consumer expectations), leaving many brands feeling like they are constantly trying to catch up to the world's CX innovators, particularly when it comes to technology.

Do you feel your customer care organization is generally meeting the needs and expectations of your customers?



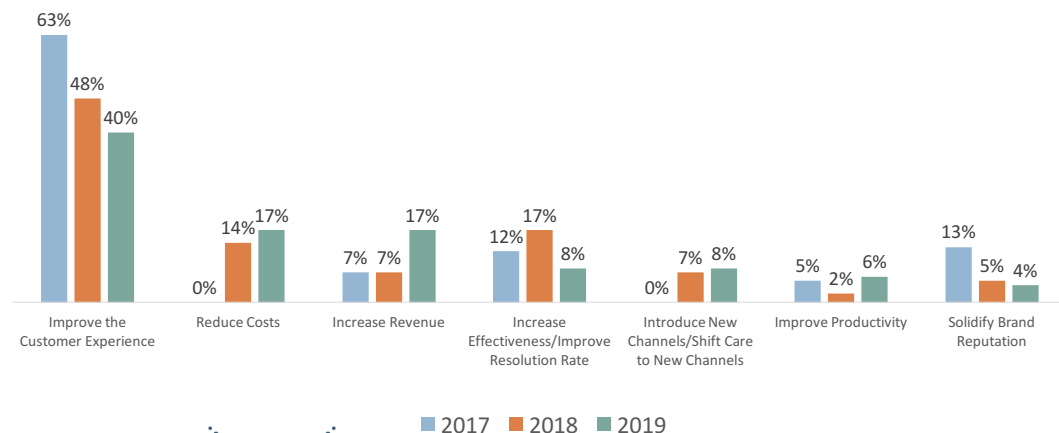
Is your company's leadership fully committed to a customer-first strategy?



Like the self-assessment results above, survey respondents were less enthusiastic than in years past regarding their leaderships' commitment to a customer first-strategy. Only 44% of respondents indicated their leadership was committed to a customer-first strategy (the lowest result on record), while 5% of survey participants responded with a firm, "No." If brands are serious about improving the customer experience, deployment of a customer-first strategy is a must, and the most logical place to start.

While on the surface the decline of brands indicating customer experience as a top priority is a concern, further study is required to understand what may be driving the decline. Are companies moving away from CX to focus on financial productivity? Or is this indicative of a mature market looking to realize the financial benefits of the advanced CX technology they have implemented to drive improved CX.

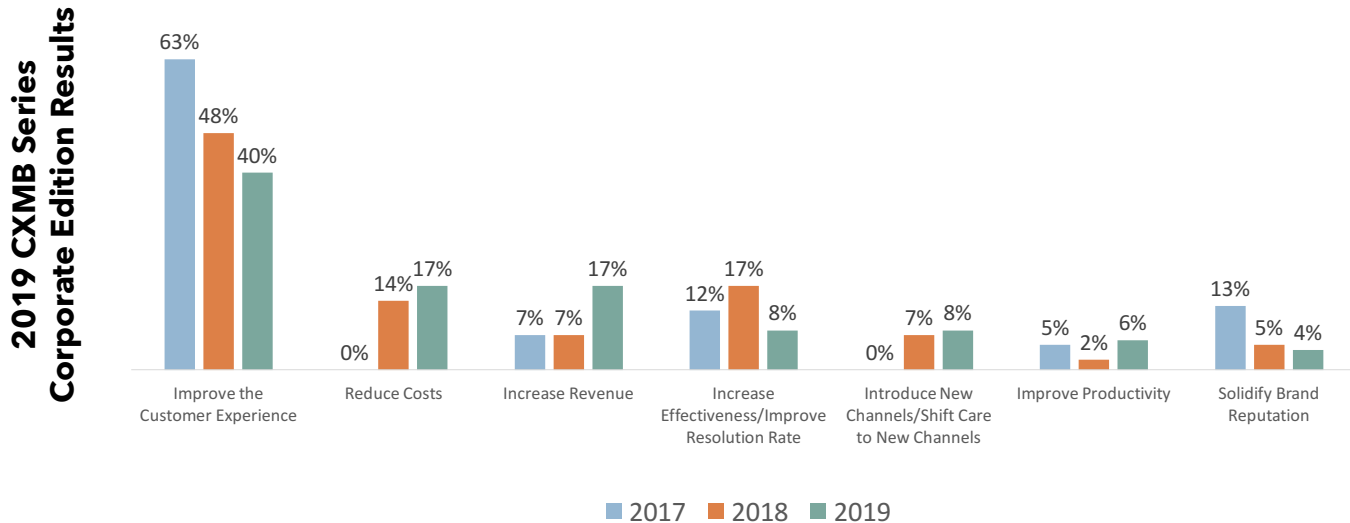
What was the top priority of your company's leadership regarding customer experience management over the past 12 months?



Understanding What Is Most Important

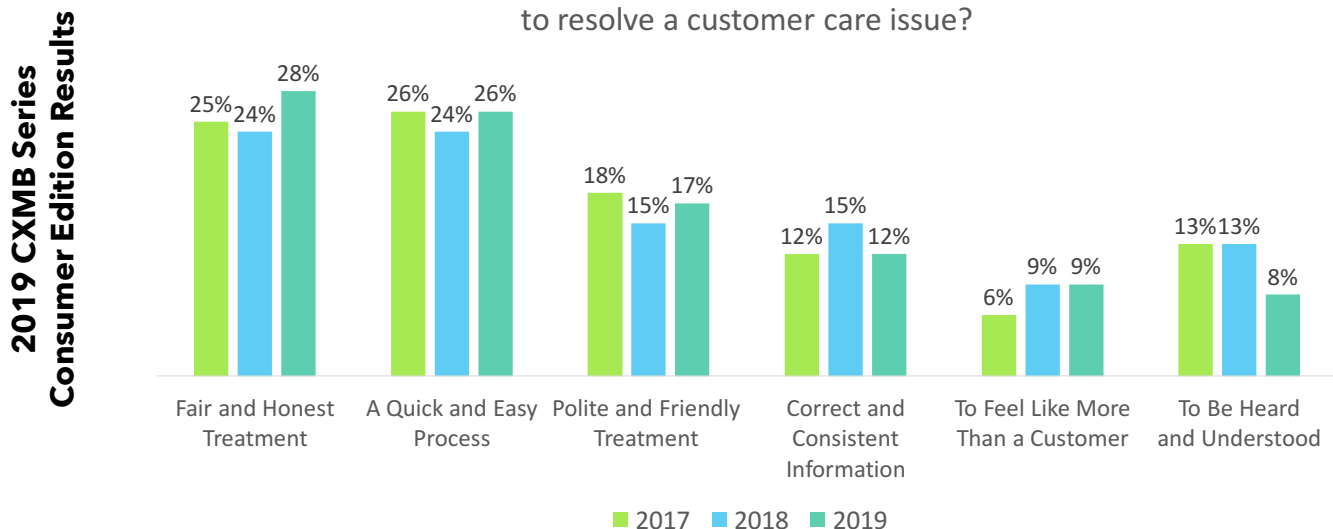
When asked what's most important to their customers, roughly half of corporate survey respondents continue to point to "A Quick and Easy Process." In fact, in the minds of corporate survey respondents, little else comes close to this response, with only 24% indicating "Correct and Consistent Information," and the balance distributed among the other responses. But when consumers were asked a similar question (below), results reveal a somewhat different perspective.

What was the top priority of your company's leadership regarding customer experience management over the past 12 months?



While consumers do value "A Quick and Easy Process" for resolving customer care issues, this aspect is matched by consumers' desire for "Fair and Honest Treatment." This divergence presets brands with two distinct opportunities: 1) to seek an understanding of what "Fair and Honest Treatment" means to consumers; and 2) to assess whether or not their CX program is delivering the "Fair and Honest Treatment" consumers find so important.

Aside from getting your issue resolved satisfactorily, what is most important when dealing with a large brand to resolve a customer care issue?





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