



KIA MEMBER SPOTLIGHT: PUTTING SIMPLICITY AT THE CENTER OF EXCEPTIONAL EXPERIENCES

KEY FINDINGS FROM THE CXMB SERIES
2020 CORPORATE EDITION REPORT



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The Latest Results from the Industry's Most Comprehensive Research



Welcome to the April 2021 edition of CX Insight magazine, an Execs In The Know publication.

Minimizing Effort, Growing Satisfaction

"Simplicity is the ultimate sophistication." – Leonardo da Vinci

Keeping things simple has always been the hallmark of a great customer care experience. Traditionally, simplicity (and the reduced effort it brings) has been targeted at customers. But this is no longer enough. In fact, many brands have awakened to the idea that creating a simple customer journey is really a two-part equation. On the one hand, customers should have their issue resolved with as little effort as possible. But in order for this to happen, brands need to build simplicity into their internal toolsets and processes. If the agent journey and the tools they use are complex and uncertain, nothing short of a miracle is needed to consistently deliver a seamless, effortless experience to the customer.

In this issue we look at some innovative ways to help an improved experience take root, like maximizing the work-from-home environment through effective employee engagement. We explore what is means to become a cognitive enterprise, and we plant interest with a few highlights from the recently released CXMB Series 2020 Corporate Edition report. Furthermore, we get familiar with Julie Weingardt in this month's KIA Online Community Member Spotlight and learn how her company, Turo, puts simplicity at the center of everything they do.

As contact center operations rely more heavily on automation, and more complex engagements are left to agents, delivering a simple experience for all is only going to grow more important. We hope this issue sprouts some new ideas for readers as they use their brilliance to build better experiences for both their customers and employees.

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"The goal of the Cognitive Contact Center is to produce a better agent experience and, ultimately, a more personalized experience for customers."

Becoming a experience for customers." Cognitive Enterprise By Execs In The Know

Reimagining a Smarter, More Personalized Customer Experience

In a contributed article¹ featured in the January 2021 issue of CX Insights, one of the emerging trends identified for 2021 was "The Cognitive Contact Center Movement." As explained in the piece, COVID-19 was a catalyst in accelerating the movement toward the Cognitive Contact Center, and for many reasons. Customers and contact center agents were both affected by the pandemic, forcing companies to adjust things like their channel strategies, workflows, customer journey designs, self-service offerings, automation, and the use of Artificial Intelligence (AI), just to name a few. It was further explained that the Cognitive Contact Center is indeed forcing the customer experience (CX) industry

to re-imagine the journey, all with the goal of producing a better agent experience and, ultimately, a more "personalized" experience for customers. With the increased adoption of AI, natural language processing (NLP), machine learning, and sentiment analysis, all signs point to this movement as the start of a trend.

Also explained in the article, the Cognitive Contact Center starts with designing effortless agent and customer experiences by moving contact center telephony to the cloud, integrating systems, leading with self-service and automation, enabling universal agents, delivering insights, and continuously optimizing to help contact center operations get smarter with every engagement.

Indeed, we are seeing and hearing of these initiatives and expect to see even more organizations go in this direction with their

"The Cognitive Contact Center starts with designing effortless experiences for agents and customers by using technology and improved processes to get smarter with every engagement."

contact centers. Considering the pace of change, we thought we would take a step back and look at this from an even broader lens than the contact center. In this article, we will expand on this growing trend by providing food for thought about how this movement toward a Cognitive Contact Center should be considered across the entire organization.

Laying the Foundation: Cognitive Computing and AI

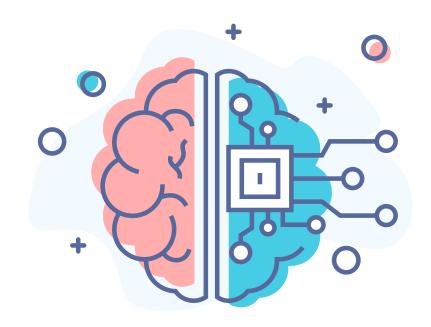
Before we talk about the cognitive transformation and its implications, let's first review what "cognitive" really means and how it differs from Al.

IBM Fellow, Dharmendra Modha, explains, "Cognitive computing goes well beyond artificial intelligence and human-computer interaction as we know it - it explores the concepts of perception, memory, attention, language, intelligence, and consciousness. Typically, in AI, one creates an algorithm to solve a particular problem. Cognitive computing seeks a universal algorithm for the

brain. This algorithm would be able to solve a vast array of problems."

In other words, cognitive computing not only uses data to solve problems more quickly, but it also goes a step further by learning from every interaction to replicate human thought processes and emotions. Leveraging AI, machine learning, NLP, sentiment analysis, data mining, and pattern recognition, cognitive computing gets closer to replicating how the human brain works to deliver more personal, relevant, and empathetic experiences. External, internal, structured, and unstructured data is mined in real-time from all channels and sources to deliver a cognitive experience in the contact center but can also be used throughout the organization to drive enhanced customer loyalty.

Customers are increasingly using more than one channel to interact with brands and solve problems. They are turning to self-service for more routine issues, and by the time they get to agents, they have likely already attempted to resolve their issue in another channel. More personalized and relevant experiences in self-service channels will be expected and customers will expect more from their one-on-



"Cognitive computing goes well beyond artificial intelligence [...] it explores the concepts of perception, memory, attention, language, intelligence, and consciousness."

one interactions with agents as well. The ability for brands to truly deliver a more cognitive experience, not only in the contact center but across the organization, will be a differentiator for those who embrace it.

A Cognitive Enterprise

Achieving a Cognitive Contact Center requires forward-thinking leaders that are customer obsessed across the entire organization, with a focus and commitment to technology breakthroughs that truly exceed customer needs and expectations. Let's face it – 2020 was challenging for everyone. It would be tempting to go back to business as usual after the pandemic, but those who look to the future and embrace transformation will now find themselves at the forefront of this trend and, more importantly, stand out amongst their competitors.

The pandemic shined a bright light on companies' ability to pivot quickly, accelerating many of their strategic initiatives – including digital transformation. In fact, in the Customer Experience Management Benchmark (CXMB) Series 2020 Corporate Edition report, 50% of those surveyed said their strategic initiatives were accelerated because of COVID-19. The momentum is there, but the question is: "Where are organizations going to go from here to continue to innovate and transformation?"

Consumer behavior and expectations likely changed forever in 2020. Some of these shifts were certainly underway prior to the

pandemic, though many are now here to stay, and even accelerating in their pace. Think about behaviors and expectations. The way people shop and entertain themselves has changed dramatically, and many now expect almost 24/7 service for any and every type of issue that may arise.

A Cognitive Contact Center is only one component required to achieve the transformation that will address rapidly changing customer expectations. Meaningful transformation involves the entire organization moving in the same direction with the same objective. This a Cognitive Enterprise. So, what does that mean for the broader organization?

Below are seven "Must Have" elements for becoming a Cognitive Enterprise.

1) START AT THE TOP WITH CUSTOMER OBSESSION

Achieving a Cognitive Enterprise starts in the boardroom and cascades to all levels of the organization. Most companies talk about CX as a priority, but to transform and stand out among competitors, "customer obsession" must permeate throughout the organization. It cannot just be a slogan or a poster on the wall, but must be evident in decision-making, strategies, planning, investment, and execution. This goes beyond creating good experiences at every touchpoint, or even delivering a seamless experience when navigating between



"Meaningful transformation involves the entire organization moving in the same direction with the same objective."

channels. Those things will become expected, and the cognitive contact center will be the result of that. But it goes beyond the contact center and can only be achieved if the idea of "customer obsession" is woven into the fabric of the organization.

2) DESIGN, DEVELOP, AND LEAD WITH HUMANITY

Although technology, data, and processes get the lion's share of attention in delivering a cognitive experience, it is critical to remember that this is all about people. It is about the customers. It is about the agents. The kind of transformation we are talking about cannot happen without technology, but it certainly cannot happen without people. And if 2020 has taught us anything, it is that human interactions and connections matter. An organization cannot deliver empathetic experiences using technology if they are not connected with their people and customers. From both an agent and customer perspective, more automation and self-help options mean more complex issues will be handled

by agents. This requires more humanity and empathy, not less. So, agents must have the skills and training to handle these interactions delicately, which often means a different hiring profile and, most certainly, different training. And with more remote workers, it is critical to ensure employee engagement is prioritized to maintain a connection with your people. With more self-help options and the increased use of cognitive technology (both agent- and customer-facing), the human element should be front and center. A care organization should not simply be trying to solve customer issues, but also put a human touch on those interactions. As an organization designs these journeys and implements technologies, it should ensure their customers have a seat at the table. With every journey design effort, improvement initiative, and technology implementation, an organization should ask itself if the customer is represented, what they may be experiencing, and, most importantly, what feelings does that experience inspire?

3) TRULY UNDERSTAND THE UNMET NEEDS OF CUSTOMERS

What outcome are customers expecting? Do we really know? Data and research indicate that customers are expecting personalization, whether through selfservice or human channels. But more than that, they want humanization. They want the best of both worlds - fast, around the clock service, and also the human aspect of talking to a live person. They want and expect empathy, meaning they expect that their feelings will be recognized and understood. But every company is different, and customers may expect something different when interacting with one brand versus another. Therefore, brands must consistently have a pulse on what their customers want and what their customers are currently experiencing. This involves a nimble approach to collecting customer feedback, customer journey mapping, and the ability to adapt quickly based on the data.

4) BECOME AN ORGANIZATION THAT LISTENS

Related to number three above, market research, customer segmentation, and the like all provide valuable insights, but it is often outdated by the time it is operationalized. Furthermore, these insights often lack the nuances of emotion, something that truly drives the decisions and experiences of customers. As explained in this article² by Accenture, becoming a listening organization means "picking up on signals through data and research to understand what people are saying and how they're behaving (knowing the two aren't always the same)." This involves new ways, approaches, and data mining technology to integrate qualitative and quantitative data to make sense of it, allowing organizations the ability to predict



what customers will do and why. This can help organization bypass extensive and long-term segmentation studies or lengthy customer journey mapping projects.

Getting information quickly and leveraging it through all parts of the organization will ensure the ability to stay in front of the everchanging expectations of the customer, facilitating quick decisions that drive customer loyalty.

5) THINK BIGGER THAN INDIVIDUAL TOUCHPOINTS OR CHANNELS

Over recent years, many organizations have had initiatives focused on optimizing specific touchpoints or improving consistency across touchpoints. These are important and necessary for improving the journey. For example, initiatives aimed at optimizing a self-help channel, which has been a particularly well-worn path in the

past year. While necessary, this one initiative is not likely to be a game-changer for the organization or its customers. Leaders must think broader. What is going to provide the most value to customers? What will make the experience with a company stand out amongst others? A brand needs to walk in its customer's shoes from the time the customer begins engaging with its brand in the areas of shopping, purchasing, and seeking support. Only then is it possible to find moments in the journey where greater value can be added. For example, what would make large online purchase experience stand out among the competition? Perhaps offering the ability (during the purchase process) to schedule a follow-up support call for remote product setup. Imagine a customer, receiving their new computer at home, and the day it is delivered they receive a proactive call from a support agent to help with final set up. Or in lieu of a live agent, upon delivery, provide the customer an SMS text with links to a virtual assistant or online tutorials. based on information known about the



customer's technical abilities, needs, and specific products purchased. This sort of thinking creates an interconnected brand experience, generating a positive brand impression and improved loyalty.

6) IMPLEMENT A FLEXIBLE AND AGILE TECHNOLOGY INFRASTRUCTURE CENTERED AROUND THE EXPERIENCE OBJECTIVE

Underlying a Cognitive Enterprise transformation is technology. Legacy systems and outdated technology are often a barrier, but those who are investing in the migration toward more agile and flexible platforms and architecture will be able to achieve this transformation more quickly. Data needs to be readily available, but also able to be integrated, consumed, analyzed, actioned, and leveraged in real-time. This involves the move toward a cloud infrastructure as the foundation with data powered by AI. A technology strategy should not be developed in a vacuum, isolated from the CX strategy. In fact, the best path to creating an effective technology strategy is to base it off of overarching CX objectives.

7) REIMAGINE THE ORGANIZATIONAL STRUCTURE

Just as an organization's technology infrastructure needs to be agile, so does the organization. For many, this means a shift to flatter hierarchies for more agile and empowered teams, as described in this article³ from IBM. Even training and learning may be approached differently, with more peer-to-peer learning. This not only provides more opportunities for staff to add value and feel their worth, but creates more collaboration among team members, especially in a world that is becoming more physically distant with remote working. Required minimum skills will also see a shift,



both in the contact center as well as in the wider organization. For agents, a cognitive contact center means that more relevant information will be more readily available and more easily served up to agents. Product training may not be as extensive, but the skills required for an agent will be much more focused on problem solving and interpersonal skills given the nature of the issues they will be solving for customers. For the rest of the organization, this means more personal accountability and a focus by leadership on ensuring teams are organized most effectively based on skills and desired outcomes.

Summary

Every leader in the CX community is focused on the customer journey, and where to go from here while navigating toward the other side of the pandemic. While the past year may have accelerated customer expectations and related strategic initiatives to address those expectations, the truth is that many organizations would have gotten to this spot regardless of the pandemic. It just may have taken a little longer. CX leaders now have the opportunity to be a part of a meaningful and lasting transformation. The contact center is a vital part of that transformation, but it is bigger than that. We know what customers want and expect - a personalized, relevant, and meaningful experience. This involves every part of an organization, starting in the boardroom. The status quo, which has all too often been a siloed approach, will no longer meet those expectations. It will take the entire organization from the top down to drive significant change and to become a Cognitive Enterprise that is customer obsessed. Those who accept the challenge will be recognized and embraced by customers now, and well into the future.

Links:

- 1 https://execsintheknow.com/magazines/january-2021-issue/top-5-customer-experience-trends-of-2021/
- 2 https://www.accenture.com/us-en/insights/interactive/business-of-experience?c=acn_glb_businessofexpergoogle_11656573&n=psgs_1120&gclid=EAlalQobChMlqpbc7u2w7wlValXVCh3v8gMUEAAYBCAAEgLKfD_BwE&gclsrc=aw.ds
- 3 https://www.ibm.com/downloads/cas/GVENYVP5



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Renewing a Commitment to Employee Engagement in 2021

Tapping Into the Power of Engaged Employees

By Execs In The Know

Employee engagement is not a new buzzword, nor is it something that leaders are only now focused on. However, from the impact of COVID-19 to the tense political atmosphere and issues surrounding social injustice, the events from the past 12 months have motivated organizations to place their employees' engagement and wellbeing under the microscope.

In this article, we will review why employee engagement is so important, the elements of an effective employee engagement program, and the key drivers to improving overall engagement. But first, it is important to align on what employee engagement is, and what it isn't.

Employee Engagement versus Employee Satisfaction

Employee engagement is a measure of an employee's commitment to their employer and their employer's business objectives. Engaged employees feel they are a part of the broader organization's success because they clearly understand their roles and how it impacts overall results. They are passionate about their work and enthusiastically give more of their time, talent, and efforts to the organization.

In a <u>report by Qualtrics</u>¹, researchers devised a system for measuring employee engagement using a composite score of these five factors:

- Discretionary effort the desire to go above and beyond
- Pride in work and the organization
- Advocacy for the organization
- Feelings of accomplishment from work
- Intention to stay

Often, employee engagement and employee satisfaction are mistakenly referred to interchangeably. Employee satisfaction is important to measure, but it simply measures how happy employees are, and usually at a particular point in time. An organization can have "satisfied" employees, but that does not necessarily translate to their commitment and level of effort in their contribution to the overall success of the organization. For example, a satisfied employee may be happy with their flexible schedule, their colleagues, or the company's benefits. While employees may value something about their work environment, that does not mean they are truly invested in helping the company achieve its goals.

Why is Employee Engagement Important?

Most customer experience (CX) leaders understand the importance of employee

engagement in contributing to the overall success of their organization. But research bears out why employee engagement should be at the forefront

"Engaged employees feel they are a part of the broader organization's success because they clearly understand their roles and how it impacts overall results."

of the strategic initiatives for every organization, both in 2021 and beyond. In fact, there is no shortage of research and statistics about the impact of an engaged workforce. Below is just a snapshot of some revealing findings:

In this McKinsey report², findings reveal that engaged and satisfied contact-center employees are:

- 8.5X more likely to stay than leave within a year
- 4X more likely to stay than dissatisfied colleagues
- 16X more likely to refer friends to their company
- 3.3X more likely to feel extremely empowered to resolve customer issues

Additionally, <u>Aberdeen Group research</u>³ found that:

- Companies with an employee engagement program experience 233% greater customer loyalty
- Employee engagement programs help companies realize 26% greater annual revenue
- Companies with robust employee engagement programs are seven times more





likely to link employee performance with good customer experiences.

And finally, <u>Gallup had these statistics</u>⁴ to report when analyzing results from a study of top quartile performance compared to bottom quartile as it relates to employee engagement:

- 81% lower absenteeism
- 18% less turnover (in higher turnover organizations) and 43% less turnover (in

lower turnover organizations)

- 10% higher customer loyalty / engagement
- 23% higher profitability

In short, employee engagement touches every aspect of an organization's success, from customer loyalty to financial performance. This has always been true, but it is an even more critical driver to organizations' success at this pivotal moment in time.



Implementing an Effective Employee Engagement Program

Consistently and effectively driving employee engagement can be challenging under normal circumstances. But when the complexities of physical distancing due to COVID-19 and a largely remote workforce is added, it is an even more nuanced challenge to tackle. Before an organization can begin to implement specific initiatives to improve engagement, a robust and structured program is needed. This involves the following:

1) DOCUMENT AN EMPLOYEE ENGAGEMENT MISSION STATEMENT

/ PURPOSE: Many company mission statements focus on the customers or even shareholders. Naturally, when something is written it makes it real, and allows employees to connect with it, and provides a basis for holding leaders accountable. It's also evidence of leadership's commitment to the mission. Employees must see that the organization is committed to employee engagement, and not just "checking a box" or treating it as the "priority of the day."

2) CREATE A MEASUREMENT SYSTEM:

Most organizations measure employee satisfaction via surveys, but not employee engagement. And if they do, it is often just done once or twice a year. Focus the survey on the aspects most critical to employee engagement and seek this input quarterly. As we have seen in 2020, the landscape can change in an instant, so it is important to receive timely and relevant measures of engagement.

3) LISTEN TO THE FEEDBACK AND ACT

ON IT: All too often, employee satisfaction or engagement surveys do not lead to meaningful action. Or if they do, employees do not hear about it. It is critical to create a process to consistently communicate

results, findings, and action plans to staff, and (most importantly) follow through on those action plans. Additionally, all feedback does not have to be received from surveys. Create safe environments and forums for employees to provide feedback, both confidentially as well as publicly.

4) ACT ON "LOW HANGING FRUIT"

QUICKLY: Following up to #3, leaders will find opportunities to make some quick changes from the feedback they receive. If employees see that their feedback matters and is turning into actions that make a difference, they will be more involved, and organizations will gain momentum for longer-term, more complicated initiatives.

"... DEI (as well as overall corporate social responsibility) is one of the strongest drivers of employee engagement."

One size does not fit all, so while the following section will outline some key findings and recommendations for driving greater employee engagement, organizations need to understand how this applies to them specifically. A structured approach, as outlined above, lays the foundation for "getting it right."

Four Drivers of Employee Engagement

Recent research has revealed several key areas that organizations should focus on in 2021. It goes without saying that a global pandemic and social unrest has changed the way employees and organizations are experiencing their work lives. Organizations have had to shift how they



service their customers, and employees have had to shift how, where, and when they work. While many, or even most, of the below should always be top of mind when thinking about employee engagement, they take on special meaning and importance in the current climate. Below is information about each of the four drivers of employee engagement, and some examples of how to bring them to life at any organization.

1) DIVERSITY, EQUITY, INCLUSION (DEI) - The Qualtrics research found that DEI (as well as overall corporate social responsibility) is one of the strongest drivers of employee engagement. Employees are watching (and listening) to how their companies react to the highly charged issues that have publicly affected so many in the last year. They want to have a "sense of pride in the company's efforts to have a positive impact on the world." When employees believe in what their company is doing, they will want to be active participants in those efforts. As we found through our insightful discussions with Nordstrom, Hilton, and Groupon⁵, the companies most successful in integrating employees into their strategies, and therefore able to drive engagement, all have one thing in common: they are clear in their

mission and they work hard to weave it into the fabric of their organization. This article published by Glassdoor highlights several companies, such as Salesforce and Slack, who not only support external organizations, but have robust programs which involve internal employees in improving DEI within their organizations. For example, Salesforce launched their Racial Equality and Justice Task Force to help drive systemic change within their own workplace and among their community. Employees from the company were invited to participate to help forge their vision. Slack created a program called Rising Tides which is devoted to investing in emerging leaders. It is a six-month program for talented and diverse high performers who have historically lacked access to this type of support.

2) SENSE OF BELONGING: A feeling of belonging is intricately linked to DEI and corporate responsibility. But being "included" does not necessarily equate to a sense of belonging. The Qualtrics research showed the strong correlation between belonging and overall engagement. They found that 20% of employees who feel they do not belong are engaged, versus 91% of those

who feel they do – a 3.X difference. This same research also found four key factors that influence peoples' sense of belonging:

- "I am proud of this company's effort to have a positive impact on the world." (as explained in #1 above)
- "There is open and honest communication at this company."
- "I feel like a valued member of my team."
- "I feel supported in my efforts to adapt to organizational changes."
 Creating a sense of belonging for



employees has never been more important than it is now. Cecilia Herbert, Experience Management Scientist with Qualtrics, says it best when she says, "We all know what it feels like to belong, or to fit in with others. Feeling like you can be your unique and authentic self at work and connected to those around you fulfills our core need to form and maintain strong, stable interpersonal relationships with others."

Feelings of isolation are magnified in our current environment, so organizations need to create safe spaces for employees to interact and build relationships. This can be done with things as simple as book clubs, weekly "virtual" lunches, or special projects that support broader DEI or other initiatives. Involving employees in key decisions also gives staff a sense of purpose and belonging. For example, when Southwest Airlines was changing uniforms, they involved employees in that process over the course of many months. Once the decision was made, they felt a sense of pride about it and, most importantly, felt part of the solution.

- 3) EMPLOYEE WELLBEING: Once again, the Qualtrics research found close correlation between belonging and wellbeing. In fact, their data showed that people who feel like they belong are three times as likely to have a sense of wellbeing. It is understandable that when organizations ensure employees feel safe, secure, and supported, they demonstrate a higher level of care and commitment to their work. In addition to belonging, there are many factors that influence employees' wellbeing such as:
 - Confidence and trust in leadership –
 This is always critical, but especially in times of disruption. When employees follow their leaders with confidence and certainty about the direction of the company and the decisions it is making, they will be more engaged. Most importantly, all levels of leadership must lead from a place of empathy and compassion.
 - Communication / change management — Communication and change management are drivers of trust in leadership. Consistent and transparent communication instills trust in leadership and fosters a "we are in this together" mindset.





- Work-life balance With a large remote workforce, employees are more "connected" than ever before. This is causing "burn out" for many who struggle to balance (or separate) their work lives from their personal lives. Flexible schedules and "enforced" vacation time (even if not traveling anywhere) can help. Additionally, creating "non work" virtual activities, or "digital detox" days (as one organization calls it) are all ways to foster a more balanced approach to our new normal.
- Adequate tools to be successful Most employees want to do a good job. And when their tools (or lack thereof) hold them back, it is at minimum demotivating, and at worst incredibly stressful. With much of the workforce shifting to a work-from-home (WFH) environment almost overnight, this has been a struggle for many. Given that

- many organizations maintain at least some level of WFH staff, providing adequate tools is even more important.
- Recognition / appreciation It is important to continue with recognition programs. Small but frequent rewards can go a long way, especially when presented in a public forum. When people feel appreciated, they are motivated to keep working hard for their leadership and their company.
- Feeling "heard" Soliciting employee feedback and measuring their level of engagement is one piece of the puzzle. But as mentioned earlier, the key is acting on it and communicating about those actions.
- Access to support resources With the challenges of the past year, employees need more support than ever. Leaders need to recognize the level of stress

their staff are under and make resources available to help them. This could be in the form of counseling, financial services help, or providing access to fitness and wellness programs.

4) LEARNING, DEVELOPMENT, AND **GROWTH OPPORTUNITIES** – Once again, this is always a driver of employee engagement, and McKinsey's research found that promotional opportunities account for 14% of an employee's satisfaction, and of course promoting high performers from within sends the message that good performance will be rewarded. Beyond that though, employees respond positively when organizations invest in their development. This can be in the form of "formal" internal training and upskilling opportunities, but can also be offered more creatively via external webinars, special sessions with an industry expert, and specific reading material or podcasts of interest for the employee. Structured mentorship programs, "career coaches," or shadowing opportunities are becoming more popular as well. Most importantly though is taking a genuine interest in the career goals of employees. This requires effective managers with structured goal planning capabilities and effective feedback mechanisms. Employees generally know what their gaps are but need support in understanding how to close those gaps. They also need their strengths to be reinforced so they understand where their skills can be optimized. Ongoing and consistent feedback from their managers is a key component, but 360-degree feedback from peers and other managers provides an even broader perspective.

The power of engaged employees should not be underestimated. Industry research and, more importantly, employees, are telling us that it will be a key differentiator for many organizations in 2021 and beyond.

Notice that none of the key drivers mentioned above included "pay." While pay is always important, engaged employees are focused on more than their paycheck. They want to be a part of something. They want to feel that their work matters and has value. Twenty-twenty was difficult, but one of the silver linings that came out of it was the emphasis placed on culture, purpose, social responsibility, inclusion, wellbeing, and growth. The key is to take the learnings from 2020, understand what they mean for an organization and its employees, and take action to make a real difference for the entire team in 2021.

Links:

- 1 https://www.qualtrics.com/ebooks-guides/employee-experience-trends-2021/
- 2 https://www.mckinsey.com/pe/~/media/McKinsey/ Business%20Functions/Operations/Our%20Insights/ Boosting%20contact%20center%20 performance%20through%20employee%20 engagement/Boosting-contact-center-performancethrough-employee-engagement.ashx
- 3 https://www.verint.com/Assets/resources/resourcetypes/white-papers/aberdeen-employee-engagementpaving-the-way-to-happy-customers.pdf
- 4 https://www.gallup.com/workplace/285674/improve-employee-engagement-workplace.aspx
- 5 https://execsintheknow.com/magazines/october-2020-issue/diversity-equity-inclusion-a-watershed-moment-for-corporate-america/
- 6 https://www.glassdoor.com/employers/blog/ inspiration-for-ramping-up-diversity-inclusion-efforts/

Putting Simplicity at the Center of Exceptional Experiences

KIA Online Community Member Spotlight: Julie Weingardt

By Execs In The Know



TURO

Julie Weingardt believes the most important customer interaction is the one that happens next. This belief has evolved from her incredible depth of experience, including 30 years of

experience traversing both sides of the business, leading operations both as a provider and a client. Regardless of which side of the table she sits on, Julie has always been moved by the idea that every customer touchpoint is an opportunity to strengthen a relationship, and to build a brand, no matter the channel or issue at hand. But it all starts with simplifying the experience.

In early February, we met with Julie, capturing her thoughts in a number of areas including her philosophy on managing operations, Turo's future plans, and what gets her most excited about her job.

Julie serves as Vice President, Operations at <u>Turo</u> (turo.com/gb/en), the world's largest peer-to-peer car sharing marketplace. Turo is where guests go to book any car they want, wherever they want it from a vibrant community of trusted hosts from across the US, Canada, and the UK.

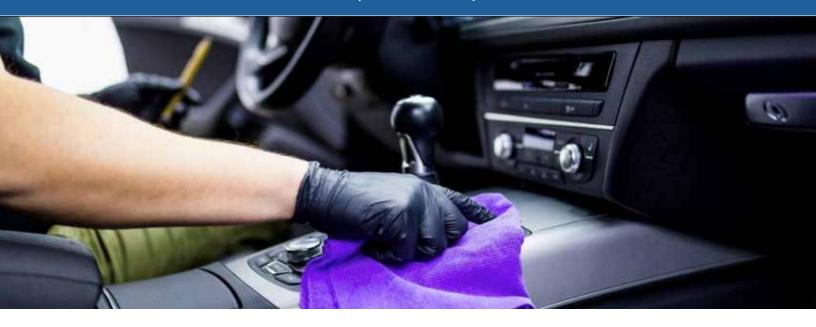
EXECS IN THE KNOW (EITK): Julie, your career has taken you to both sides of the table, from provider to client. Can you share how these experiences have shaped your view of what

customer experience (CX) success look like, and how the measuring stick of success may have changed over the years?

JULIE: Customers have gotten more and more savvy over the years. They expect to be able to self-serve to resolve moderately easy problems. When customers have to contact support, their expectation is to quickly reach a knowledgeable person on the other end, who has at least a baseline understanding of who they are. Quick service levels and first contact resolution used to be the measuring stick. The new measure is level of effort. Expending a lot of effort to get a resolution is the nemesis of a positive customer experience.

EITK: In your opinion, which ingredients are essential in order for a brand to outshine in the eyes of customers? What are some CX "must-haves," and even some CX "nice-to-haves," especially as they apply to disruptors and other marketplace creators like Turo?

JULIE: The brands who support the customer experience the best have set the bar for everyone else. "Must-haves" include a balance of self-help and live support options. Customers who have to really search to find support become really frustrated. They will either find a way to reach you or they will end up leaving you. Having multiple live contact channels are quickly moving from the "nice-to-have" category to the "must-haves". Customers want to interact with support in the channel(s) they prefer, whether that is phone, chat, or text. YouTube has been a game changer for 'how-to' information. Providing short, video solutions to address customer needs can reduce



contacts in a way that customers have become accustomed to using. The biggest challenge is keeping the video content up-to-date if your policies or processes change frequently.

EITK: Based on your impressive resumé, it's clear you are laser-focused on operations and processes changes to improve operations. In your opinion, what is the one operational process that is often neglected, but if shown a little love, can have a direct and positive impact on the customer experience?

JULIE: This answer actually applies to all processes. Keep it simple. Processes tend to grow more complex over time. This is especially true now that AI is handling easier contact types. Take time to helicopter up and look across your workflows to make sure they aren't overly complicated. I'm a firm believer that a straightforward agent experience translates to a better customer experience.

EITK: This past year saw a total reshuffling of priorities for obvious reasons. Aside from the shift to WFH, which projects gained new urgency at Turo? How have those projects faired?

JULIE: Turo had to urgently address the safety of our host and guest communities with the outbreak of the virus. We built trust

by defining and documenting sanitization standards, educated hosts about how to protect themselves and their quests, plus provided them resources such as access to hard to locate cleaning supplies. We verified host agreements to comply with the new standards and made cleaning 'badges' visible to guests in the booking process. A cleaning and sanitization checklist within the product is to be carried out by every host before the start of a trip and the completion of that checklist is visible to the guest. If, for any reason, a guest is worried about the cleanliness level of a vehicle upon check in, they are able to cancel 'worry-free',

without penalties. Turo also added sanitization to customer reviews to track the execution against these standards. Our immediate and effective responses to COVID 19 averted customer dissatisfaction and cost overruns.

After reducing both our internal



Enhanced cleaning & disinfection checklist

To keep you and your family safe and healthy during your Turo trip, I have cleaned

Cleaning vs. disinfecting

Cleaning surfaces with soap and water removes dirt and germs from surfaces, but doesn't kill germs.

Have a safe &

healthy trip!

Host notes

Vehicle hot spots

- ☐ Exterior door handles & trunk la
- ☐ Interior door handles
 ☐ Sun visors
- ☐ Rearview mirro
- ☐ Cup holder
- ☐ Seat belts
 ☐ Gear selector
- ☐ Infotainment & ter All other switches (seat & mirror ad windows, lights, turn signals, etc.)
- ☐ Air vents
- ☐ Keys & key fob





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and BPO partner teams, operations put a lot of focus on regrowing support thoughtfully. We have efforts underway to simplify, reduce, and streamline our software toolset, while simultaneously building a modern, integrated customer experience.

EITK: What are some of the exciting things you have planned for 2021? Which initiatives do you foresee having the most positive impact on your customers?

JULIE: As mentioned above, we are very focused on transforming the customer experience by realigning support from functions (billing, vehicle quality, listings, etc.) to personas (host and guest) to provide a faster, better support experience to our community in the channel of choice, including the ability to do channel blending. As part of this initiative,

Operations, Product and Design are working together to enhance the in-app support experience.

We're also in the midst of redesigning our agent tool stack. This initiative goes hand-in-hand with what I mentioned earlier: in order to provide a great customer experience, we've got to first provide a great agent experience. In my mind, it all starts with simplification. Our future plans truly embrace the omnichannel narrative, with plans to provide agents with the complete context of a customer conversation across all channels. We'll also be implementing a SMS text link solution that will allow users to upload video and images during a voice call, an incredibly useful solution for our business. We're targeting rollout of these and other features in the Q4 2021/Q1 2022 timeframe.



EITK: What gets you most excited about this line of work, and what do you look forward to most in your day-to-day? What's your favorite part of the job?

JULIE: Getting to be part of a tech start-up has been incredibly delightful and fulfilling. There is always something new to be learned. I'm proud to be part of a company which is also leveraging the Turo marketplace to economically empower Black hosts. The <u>Turo Seed Initiative</u>¹ pilot was launched in November in partnership with Kiva (kiva.org), an international nonprofit focused on expanding financial access to help underserved communities thrive. Through the initiative, aspiring entrepreneurs can secure an interestfree loan to start building a small car sharing business and pave their own path towards financial wellness, and Turo has committed up to \$1 million for the pilot to help kickstart their entrepreneurial engines and help address the wealth inequality at the root of many social issues here in the US. What I look forward to every day, and the favorite part of my job, is truly the people at Turo and the values they all embody: supportive, down-to-earth, pioneering, and efficient.

EITK: Although you are fairly new to the KIA Community, your involvement and familiarity with the Execs In The Know community has been growing for some time now. Can you share what EITK has meant to you so far, and what do you hope to gain from the community in the future?

JULIE: After 25+ years on the provider side, switching to the client side has presented different operational challenges. I've really appreciated the support the KIA community provides, whether it is answers to simple questions or insights into more complex issues. KIA members are truly knowledgeable and always willing to help. It has been my pleasure to participate in events and learn from and with others in the community. I look forward to

"I've really appreciated the support the KIA community provides, whether it is answers to simple questions or insights into more complex issues."

Julie Weingardt, Turo

continued engagement with EITK and the KIA community in advancement of all facets of the customer experience.

Thank you to Julie Weingardt, Vice President of Operations at Turo, for her leadership, participation, and insights. To connect with Julie, or to participate in the wider conversation, consider joining the Execs In The Know "Know It All" (KIA) Community. The KIA Community is a private, online community designed exclusively for CX Leaders at top corporate brands. Come learn, share, network, and engage to innovate. LEARN MORE*.

*https://community.execsintheknow.com/about-kia

Links:

1 https://turo.com/blog/news/introducing-the-turo-seed-initiative





YOU HAVE CX CHALLENGES. WE HAVE A CX SOLUTION.

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The Top 10 Trends in GigCX in 2021

Highlights from *The 2021 Gig Customer Service Report*

In the technology adoption lifecycle popularized in Crossing the Chasm, even Geoffrey A. Moore would have to agree that Gig Customer Service (GigCX) has long since stopped being the domain of just innovators and early adopters, with the early majority arriving faster than anyone imagined. It's here to stay, and GigCX is scaling fast, in both volume and scope.

Since the beginning of the year, we've been speaking to a number of CX leaders across the US, UK and Europe as we've compiled our 2021 GigCX report¹, while also conducting research amongst our GigCX brand experts. The top trends we've identified here are certainly not an exhaustive list of what's new in this dynamic customer service experience resource, but we think they illustrate the power of human connection in business at its best.

1. AGILITY AND HANDLING DEMAND CHANGES IS MORE IMPORTANT THAN EVER BEFORE

The pandemic has really illustrated the depth of the flexibility of GigCX in order to meet fluctuation in demand levels, and as we spoke to CX leaders, time and time again they flagged the virtues of flexibility, accessibility and availability. COVID perhaps accelerated it, but speed of movement has really made companies realize the art of the possible. It has also shown companies the most important thing is having access to the expertise – with our survey revealing it to be the biggest priority for the majority of CX leaders over quality and cost.



2. EMPATHY IS HARD TO TEACH, BUT FOR CONSUMERS, IT COMES NATURALLY

For many companies, the decision to implement GigCX did not start with customers that needed an address change or help with billing or with other repetitive things. It was for customers that required empathy. During the pandemic in particular, we've seen just how much empathy matters in a customer experience situation, where Experts may be speaking to people who have experienced life changing circumstances. Empathy matters more now than ever in a time where connectedness is so important.

Simply put, people, more often than not, want advice and answers from people who have hands-on experience. People who have been loyal customers, and who have used products and services for years. Of course, there are some great customer service agents working in traditional settings, but they have to work hard to generate that intimacy and



knowledge without the benefit of product and brand advocacy.

3. INTRODUCING NEW KPIS

Our experts agreed that traditional customer service KPIs surrounding quality and cost were still crucial, but there are new KPIs being introduced as companies look to establish new customer journeys.

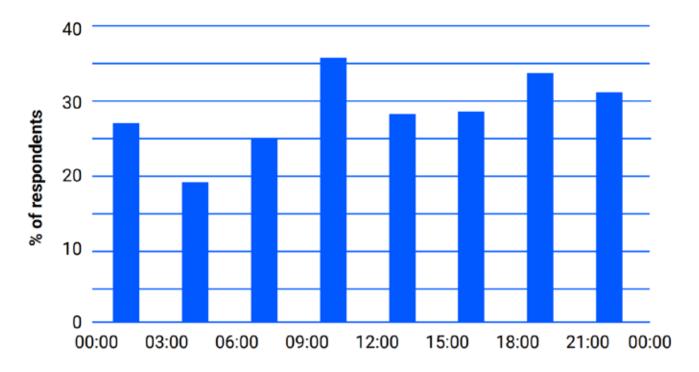
In Customer Lifetime Value, what really counts is the personal connection and relationship on offer. After all, determining customer lifetime value is all about estimating an entire future relationship with a customer – 'relationship' being the key word.

Customer Success is another new KPI, but not as you know it. It now means redesigning the CX journey so that customers see value at every step. It's about proactively engaging with the customer before they need help, and making that engagement opportunity continual, so that it doesn't just happen when it's time to submit a customer service query.

4. FLEXIBILITY IN WORKING TIMES IS IMPORTANT

Most people assume that the ability to make money is the top benefit and reward for any service, but if you ask a GigCX Expert what they really value, flexibility is bound to top the list.

What times of the day are you most active doing GigCX



As our research found, the GigCX crowd working time preferences span the entire 24-hour period, indicating that the standard 9-5 day is unfavorable to many. COVID is also playing a role here: our survey of Experts revealed that **97%** believed COVID has driven the need for more organizations to allow for work from home models and that flexibility with working times is the biggest benefit of GigCX.

5. SECONDARY INCOMES ARE IMPORTANT

Having a 'portfolio career' with multiple sources of income has been turbocharged by COVID where even the most reluctant people have realized the importance of spreading their financial risk over multiple sources of income – **96%** of our experts believed it is now more critical than ever.

our CX leaders said they saw an increase in customer service demand coming for async messaging tools, with many citing the flexibility they may be able to provide for GigCX Experts themselves – which is conducive for a higher quality conversation.

7. SHIFT TOWARDS DIGITAL

For all the bad that it's done, COVID has actually forced a wave of digital transformation and companies have been forced to explore innovation that there's no way they would have done otherwise. However, there's also an acceleration of planned digital transformation, where companies that already had, for example, a sort of three-year vision of where they wanted to go, and this is now being accelerated. GigCX is definitely part of this

96% of our survey saw themselves using more digital channels for customer service in the future.



What our research has found is that GigCX is an excellent way to tap into highly skilled people who want to work more flexibly and would love the extra income to supplement their expendable income and give them peace of mind.

6. ASYNC IS GROWING

A more specific trend in the digital shift we've observed over the past year which is also driving demand for GigCX is the area of asynchronous messaging. **40%** of in many instances.

People are also looking at customer service and contact centres very differently now, and they are expecting digital experiences because they have become more digitally savvy.

8. PEER REVIEWS MORE IMPORTANT

From online marketplace seller setup questions, to subscription customer service queries, to like-minded peers putting their



heads together to deliver honest answers surrounding products and services, it's safe to say that our CX experts found that GigCX is becoming an integral mainstream customer experience resource pool faster than we ever thought possible.

By connecting customers with other customers whether pre- or post-purchase, GigCX can clearly leverage this trend by allowing customers to communicate with people they trust more than the standard faceless brand. By making it clear they are talking with another customer who has first-hand knowledge of the brand but is not employed directly by the brand, GigCX Experts are inspiring peer-to-peer, community-based trust.

9. THE GOODGIG IS IMPORTANT TO EVERYONE

Until recent years, people operating within the gig economy have always been separated from standard employment regulations. However, the dramatic rise of gig over the last few years, driven by changing worker and customer profile

and expectations, has rightfully brought the treatment of gig workers under the microscope both from the customers being served by the gig workers and the governments responsible for protecting them.

This has driven a demand from national governments to promote the idea of 'GoodGig' practices and the protection of those active in the sector, from exploitation and circumvention of labor laws. California and the UK have already offered greater clarity on regulations in relation to gig in the form of 'Prop 22' and the UK's Supreme Court Ruling in March 2021 which has propelled change in the way gig-based companies manage their workers with other Governmental bodies considering similar regulations themselves.

For companies that can no longer tolerate stagnating customer service quality and rising costs, need to address increasing complexity, volatile demand, increased attrition, and the need for diversity, GigCX is emerging as a viable option.

76%

felt that GigCX has introduced them to new skills that will help them in their career such as communication, problem solving, and time management,



GigCX is also helping mental health and helping people with new skills. The GigCX Expert survey revealed that **85%** feel that GigCX has helped improve their mental wellbeing, **76%** felt that GigCX has introduced them to new skills that will help them in their career such as communication, problem solving, and time management, and **86%** believing that GigCX is seen more positively compared to other gig providers.

10. SECURITY IS NOT THE BARRIER TO ADOPTION IT USED TO BE

One of our experts pointed out that with COVID, driving a new work from home culture and that security may no longer be the issue companies originally made it out to be: "If you were speaking to prospects in 2019, one of the issues with GigCX may have been data security, and companies being wary about customer information going into people's homes. In 2020, everyone in CX began working from home – including all traditional contact center employees - and they are clearly proving that you can have a disparate network of Experts that not only meets performance objectives, but surpasses them."

Beyond these trends, what was also fascinating were the descriptors the leaders and GigCX Experts used in describing GigCX and the evolving human connection we're seeing today. 'Enjoyability', 'enthusiasm', and 'grace' were words heard throughout the conversations with CX leaders who'd deployed or been involved in some way with GigCX.

If you'd like to learn more about our expert's experiences with GigCX, as well as the untapped potential of this dynamic channel, please download a copy of this year's report².



Roger Beadle CEO Limitless

Roger Beadle is an entrepreneur and business leader who is reinventing how customer service is delivered via the gig economy. After establishing

several businesses in the contact center industry, Beadle co-founded Limitless with Megan Neale in 2016. Limitless is a gig-economy platform that addresses some of the biggest challenges faced by the contact center industry: low pay, high attrition, and access to new talent.

Limitless

Limitless is a gig customer service (GigCX) platform, helping businesses connect with their most engaged customers and reward them for providing on demand customer service to help address their biggest customer service challenges.

limitlesstech.com

Links:

- 1 https://www.limitlesstech.com/gig-customerservice-2021/
- 2 https://www.limitlesstech.com/gig-customerservice-2021/



Key Findings from the CXMB Series 2020 Corporate Edition Report By Execs In The Know

The Latest Results from the Industry's Most Comprehensive Research

The <u>Customer Experience Management</u>
<u>Benchmark (CXMB) Series 2020 Corporate</u>
<u>Edition¹</u> report, which is produced as part of a research partnership between Execs In The Know and COPC Inc. and was released in March 2021, provides many valuable insights for customer

experience (CX) leaders. This is especially true as operational heads develop their post-pandemic roadmaps and long-term strategies. Although the industry will continue to experience the impact of COVID-19 for years to come, the remainder of 2021 is pivotal for CX leaders as they lay out plans

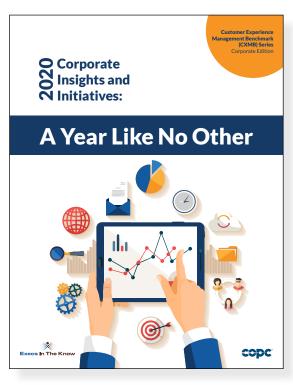


to best support customers and employees. In this article, readers will find a recap of **five key findings** from this latest CXMB Series report, along with perspective on what these findings mean for CX operations and what organizations should be thinking about as plans are laid out for 2021 and beyond.

Key Findings from the CXMB Series 2020 Corporate Edition Report

The COVID-19 pandemic forced the acceleration of strategic initiatives at many organizations.

Looking back at the events of 2020, it is impressive how organizations quickly pivoted to ensure uninterrupted support of customers and employees at a time when there was literally no playbook on how to do this. Even for organizations that had extensive business continuity plans in place, there was a mad scramble to adjust to an entirely



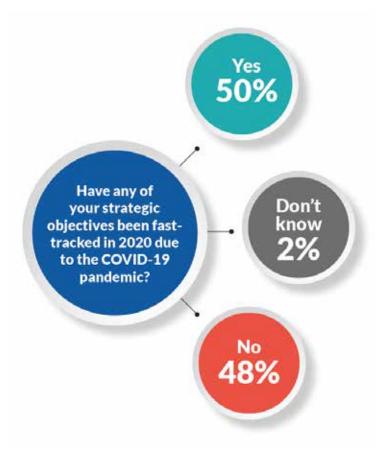
new reality. As a result, 50% of CXMB Series 2020 Corporate Edition survey respondents stated that some of their strategic initiatives were fast-tracked due to COVID-19. Some of these initiatives included:

- Greater focus on self-service technologies (SSTs)
- Increased use of newer technologies, such as artificial intelligence (AI), analytics, and robotic process automation (RPA)
- Further investments in digital platforms
- Business continuity planning (BCP)
- Shift in staffing strategies, primarily work-from-home (WFH)

THOUGHTS FOR CX LEADERS:

Although many organizations completely shifted or accelerated their 2020 roadmaps and/ or strategies, the implications will reverberate in 2021 and beyond. What does this mean for CX leaders, and which initiatives should they continue to prioritize? If an organization has not already started this assessment, now is a good time to take a step back and evaluate the impact of each major initiatives undertaken in 2020, paying special attention to how things looked before and after:

• Understand benefits of each initiative. Brands should conduct a deep analysis to understand which of their 2020 initiatives produced benefits, either for the customer, the business, or both.



- Identify initiatives that will continue to produce benefits. Based on results and projections, brands should identify the initiatives expected to continue to produce benefits longer term (versus producing a short-term benefit based on solutioning for an immediate challenge).
- Uncover root cause of under-performing initiatives. If any initiatives did not produce the expected benefits, brands should identify the root cause and determine if adjustments can or should be made for the next evolution of those initiatives.
- Assess end-to-end journey. Brands can benefit by conducting journey mapping to assess how each strategic initiative affected the customer journey, whether the impact is positive or negative. It's important to ask and understand if there are still gaps in the CX.
- Examine the return on investment (ROI) of each initiative. Of course, brands were

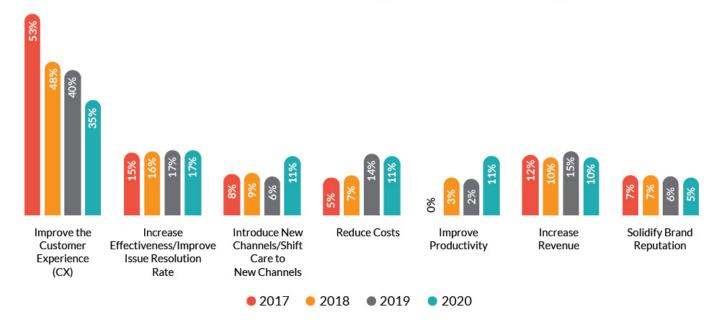
responding to a crisis and were often acting out of necessity. But it's still a good idea to run the numbers and fully understand the business impact and assess the effectiveness of the changes put in place.

It is important to carefully consider the above information at multiple intervals throughout 2021. The reason being that the economy is somewhat volatile, and the impact of a specific initiative can shift quickly from quarter-to-quarter, or even month-to-month. What might have been thought of as a strong trend three months ago may already be changing as the economy reacts to things like widespread vaccinations and changing policies regarding the pandemic, at both the state and federal level. Each business is different, and each brand needs to understand the behavioral changes of its customers, as well as the impact of its own initiatives.

Despite the challenges posed by COVID-19, improving the CX remains an industry priority.

It's understandable that many organizations shifted their priorities due to the impact of the pandemic. And of course, some industries were more affected than others, with some experiencing explosive growth while others saw a sharp decline. And while no two businesses are exactly the same, CXMB Series research showed that even with a multitude of new and surprising challenges, 35% of survey respondents stated that "Improving the Customer Experience" continues to be their top priority in 2021.

What will be the top priority of your company's leadership regarding customer experience (CX) management in the coming year?



Some of the initiatives they specifically mentioned were:

- Implement a more holistic approach to measuring CX. (Note: The percentage of respondents stating that their organizations measure CX across all channels increased from 15% in 2019 to 24% in 2020.)
- Develop systems for better utilizing consumer feedback to improve CX (78% of respondents indicated they were doing so).
- Proactively follow up with consumers who had a negative CX to remedy the situation (85% of respondents indicated they were doing so).

THOUGHTS FOR CX LEADERS:

CX has long been a differentiator, but perhaps now more than ever. Customer behavior and expectations will likely continue to evolve based, in part, on the events of 2020. With the continued focus on improving CX, brands should consider the following as they develop their 2021 (and beyond) strategies:

- Define CX for the company and embed it in the company's culture. What does "Improving the CX" mean for a particular brand? Is it a company-wide initiative? Is it embedded in everything that brand does and at all levels of the organization? Improving CX cannot just be a value stated on a poster or trotted out for internal communications. It must be the focus of every decision made at all levels of the organization. Those on the front line and those who talk to customers every day need to see, hear, and feel the commitment from the organization. In other words, the customer should have a seat at the table for every decision being made.
- Measure CX holistically across all channels. Although the percentage of organizations who said they measure CX holistically across all channels has increased, it is still a small percentage

(only 24%). It is critical for leaders to have an accurate picture of their customers' end-to-end journey. This will likely involve technology and reporting improvements. While it's not easy to do given that multiple systems and processes are involved, it is important to plan now, develop service journeys with purpose, and create the roadmap that will allow for measurement across all channels.



- Proactively follow up after negative experiences. Proactive follow-ups with
 - customers sounds logical and perhaps an obvious priority, but logistically it can be complex given the various channels and customer touchpoints. However, the <u>CXMB Series 2020</u> <u>Consumer Edition report</u>² (the sister report to the 2020 Corporate Edition report) showed that this follow-up reduces the risk of a negative impact to future purchasing decisions. Additionally, proactive follow-ups help consumers feel as though they are being heard and understood, which is an important driver of the resolution process. To deliver on this priority, operational processes, technology, data, and organizational structure will need to be carefully mapped out to support it effectively and efficiently.
- Inventory the available data and develop a roadmap for the ability to curate and leverage CX data. There is no shortage of data available to CX leaders. The challenge (and opportunity) is to make sense of the data, implement technology and processes to curate it in real-time, and most importantly, act on it. Individual brands no longer have the luxury of conducting lengthy studies or research efforts, so it benefits CX leaders to understand where their data resides, the technology needed to aggregate it, which data will provide the most meaningful insights, and how to use that data to make better decisions and provide better outcomes for customers.

SSTs witnessed significant growth and adoption, but there is room for improvement.

Much has been reported about the increase in self-service during the pandemic, and CXMB Series research is no exception. In fact, CXMB Series research found 62% of corporate respondents indicated that their SSTs channels experienced the most growth over the previous 12 months.

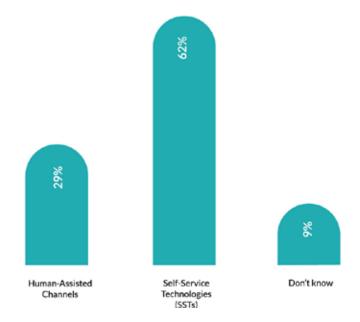
While the growth of SST solutions is encouraging and unsurprising for a number of reasons, there is still much work to be done to deliver an exceptional experience via SST channels, as well as deliver on evolving consumer expectations for SST solutions. Some of the additional, related results from the CXMB Series Corporate Edition report include:

- 81% of respondents stated that their organizations are shifting traffic from human-assisted channels to SSTs.
- 73% of respondents stated that consumers prefer to use SSTs for "simple/routine" customer care issues.



In the last 12 months, which of the following channels have grown the most?

- Despite experiencing higher growth of SSTs compared to human-assisted channels, only 25% of respondents stated that first-call resolution (FCR) for SSTs was more than 50%, whereas 62% stated the same for humanassisted channels.
- 76% of respondents stated that they have specific initiatives to increase the resolution rate for SSTs.
- "Expanding channel capability" emerged as the most important priority for SSTs.
- Only half of the respondents stated that their organizations measure the abandonment rate for SSTs.



THOUGHTS FOR CX LEADERS:

While many organizations were already actively trying to shift at least some volume to SSTs prior to the pandemic, many were also forced to accelerate those initiatives out of necessity. Unsurprisingly, volumes have increased, but it may be that capabilities have not caught up yet. For leaders who find themselves with SST solutions that are still maturing in terms of capability, consider:

- Analyzing interactions that are not solved on first contact with SSTs. The whole point of
 directing transactions to an SST is to help the customer solve an issue without the assistance
 of a live agent. If that is not successful, costs go up, as well as customer dissatisfaction. Brands
 should determine which issues are not being resolved and why, and either address those gaps
 within the SST, or ensure customers are directed to the channel that can best resolve
 their issue.
- Focusing on right channeling. As with many initiatives, now is the time to assess the types of interactions that drive the most volume, whether to human-assisted channels or SSTs. Is a brand truly attempting to direct issues to SSTs that have a high probability of being solved? Even if customers prefer an SST but a brand knows that issue needs to be handled by a live agent, are they communicating and directing the customer to the right channel? This is the most effective way to deliver easier resolutions, customer satisfaction (CSAT) scores.
- Determining which issues can possibly be solved BEFORE they happen. Related to right channeling and improving resolution capabilities, brands should consider what types of problems customers are encountering that could be proactively addressed before a contact occurs. For example, if an item goes on backorder unexpectedly, instead of waiting for the customer to contact them, a brand could send a communication immediately, notifying the customer of the new shipping date, along with links to similar products that available more immediately. This would likely prevent a contact from that customer and puts the customer



in the drivers' seat for waiting for their backordered product or choosing another one. Either way, the proactive brand improves its chances of keeping the sale and satisfying the customer.

• Develop a technology roadmap that supports an overall strategy. Many corporate respondents said some of their improvement initiatives revolved around leveraging data and insights, active monitoring of SSTs, and adopting more technology such as AI. These are all important aspects of a comprehensive SST strategy, but brands should be careful to not implement something only because it is shiny, new, or the next

hot trend. The technology brands invest in should support their overall channel and resolution strategy, especially if the brand is dedicated to a customer-first approach.

Increased utilization of WFH staff is likely to continue after the pandemic.

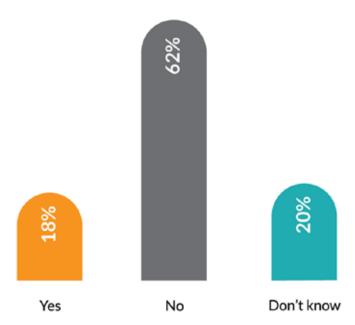
A lot has been written about the Herculean efforts undertaken by organizations in the early days of the COVID-19 pandemic. The ability of companies all over the world, to pull off the shift to WFH, and do so as quickly and effectively as they did, should not be overlooked. Looking back, many brands probably believed this was only

a short-term shift. But as time has march on, it has become more and more obvious that WFH staffing will be a longer-term strategy, requiring more permanent solutions and strategies. CXMB Series research shows that most organizations (62%) will not revert to pre-COVID-19 staffing models.

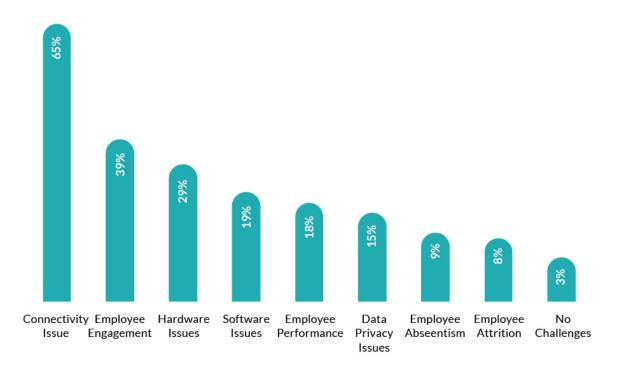
Additionally, the CXMB Series 2020 Corporate Edition report showed:

- Of survey respondents with in-house staff:
 - > 92% stated that they currently have some WFH staff.
 - > 53% stated that they had no WFH staff prior to the pandemic.
 - > 80% stated that more than half of their current staff are WFH.

Do you believe once things go back to "normal" you will revert to your pre-COVID staffing model?



What have been your biggest challenges in managing work-from-home (WFH) employees? (Select all that apply.)



- Of respondents with outsourced staff:
 - > 55% stated that they currently have some WFH staff.
 - > 64% stated that they had no WFH staff prior to the pandemic.
 - > 58% stated that more than half of their current staff are WFH.
- The biggest challenges in managing WFH staff revolved primarily around technology-related concerns (connectivity and hardware) and employee engagement.

THOUGHTS FOR CX LEADERS:

Since WFH is here to stay for most organizations, the implications to all aspects of operations cannot be overlooked and will require more permanent approaches to address the nuances of a remote versus in-center staff.

• Identify and address technology issues. As noted above, technology concerns make up three of the top four challenges faced by organizations managing a WFH workforce. Identifying and developing solutions for connectivity and hardware/software issues must be a top priority. Some organizations are developing standards for connectivity (e.g., specific providers) and even paying for said solutions. Additionally, now companies are developing standards for home equipment and either shipping directly to agents or setting up pickup points for standardized hardware, as well as standardizing software configurations. Moving to cloud environments has accelerated to address some of these issues as well. Security concerns are

also front and center, so risk mitigation solutions must also be a standard that companies implement, enforce, and monitor.

- Focus on employee wellbeing and engagement. Employee engagement and wellbeing strategies have gained in importance in recent years, but the pandemic has shined an even brighter spotlight on this critical topic. These initiatives and programs must now be structured and comprehensive to ensure employees feel connected, supported, and valued. Organizations need a holistic approach to ensure it is addressed at all levels of the organization, with a consistent drumbeat of activities and programs from the top of the organization to frontline management. Communication, from companywide memos to frequent department/team level gatherings and individual check-ins, is critical. Beyond that, programs such as book groups or volunteering initiatives drive engagement and a sense of belonging. Providing mental health support, exercise programs and resources, and financial advisors are examples of important support resources that support staff wellbeing.
- Adjust hiring, training, and coaching approaches. Skills required for WFH employees differ from those working in a physical center. For example, WFH employees must have the ability to work independently. They also need to thrive in an environment that is perhaps not for everyone. Recruiting profile likely need be either changed, or at least closely reviewed. Additionally, the process for recruiting at scale is often different than recruiting and hiring for agents in center. Organizations and hiring managers must be able to rely on remote screening and interviews, with more effective (and creative) skills verification. And of course, training, and coaching approaches are vastly different for remote workers. This involves not only technology, but operational process changes as well.

Organizations need to focus more on multichannel journeys and their channel strategies.

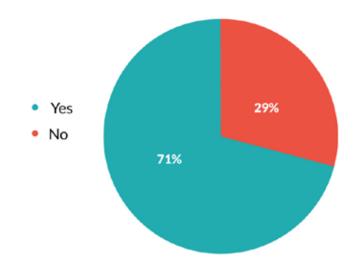
Consumers have more contact options available to them than ever before, which is also resulting in more multichannel journeys, that is engagements that span multiple channels (such as email to chat to voice) in an attempt to resolve a single issue. This was confirmed in the CXMB Series 2020

Consumer Edition, where **over 70% of consumers stated that they used multiple channels to resolve a single customer-care issue**.

With this volume of multichannel journeys, it was important to know more. Research results showed the following:

 When consumers and corporate respondents were asked why multichannel journeys occurred, 42% of corporate respondents believed that consumers were forced to take a multichannel journey. Similarly, 47% of consumers surveyed said they were forced to take a multichannel journey.

Within the past 12 months, did you use multiple channels (like phone, email, and social media) to resolve a single customer care issue?



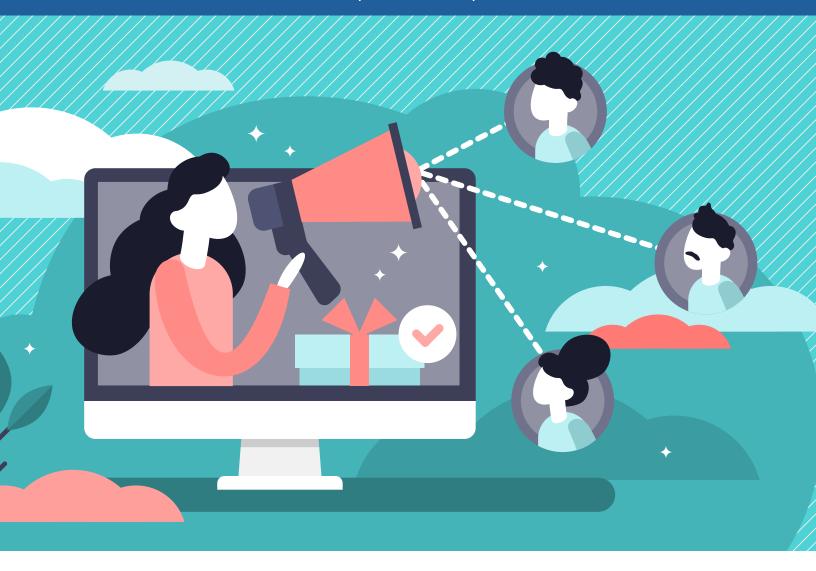
- o Results from the 2020 Consumer Edition revealed that when a consumer believes they were "forced" to take a multichannel journey, dissatisfaction rates are almost seven times greater and issue resolution is significantly lower.
- Consumers who rated their experience with multichannel journeys as "not satisfied" increased from 11% to 37% year-over-year, from 2019 to 2020.
- Only 20% of organizations measure the performance of a multichannel journey against the performance of a single-channel journey.
- While only 12% of respondents believed that their organizations do a good job of providing
 a seamless experience for consumers who use multichannel journeys to resolve an issue, only
 41% have specific initiatives in place to make it easier for customers to transition between
 channels.

THOUGHTS FOR CX LEADERS:

With the increase in multichannel journeys and the significant ramification of the same, it is critical for CX leaders to investigate why these journeys are occurring and what they can do to improve resolution capabilities, as well as the overall experience.

- Focus on end-to-end service design. Historically, many organizations have approached improving the overall experience by optimizing touchpoints. For example, they may know their mobile app experience is poor and will focus on that. While this will provide some level of improvement, it will not create transformative change. Instead, organizations must put their customer hats on and identify friction points across the journey, then redesign the journey so customers can navigate it seamlessly and put guardrails in place to effectively guide customers throughout the process.
- Address the perception (and reality) that the multichannel journey is all too often forced upon the consumer.
 Based on CXMB Series Consumer Edition results, it is evident that a large percentage of consumers feel like they are not in control of their own issue resolution journey. Better communication up front about which channels are best for specific types of issues, while allowing some level of choice and autonomy, will go a long way in pleasing the customer.
- Measure, analyze, and address satisfaction drivers of the multichannel journey. Given the increase in multichannel dissatisfaction rates, leaders should





understand the performance and key drivers of any customers dissatisfied after a multichannel journey. Is it the process, lack of resolution, frustration with tools, all of this, or something else entirely? This data should be separated and analyzed distinctly from single-channel journeys.

- Remove organizational silos. Often there are inconsistencies between channels because they are managed by different departments. For example, the website is typically managed separately from the call center. While that can still be the case, departmental leaders must work better cross-functionally, which is part of the service design strategy mentioned in the first bullet above.
- Create specific plans for creating greater consistency and ease of navigation across channels. If either of these are a priority for an organization, that organization needs to be specific in what consistency and ease mean, using their most frequently used channel as a starting point. Identify and compare the pain points within each channel and understand where inconsistencies reside. Conversely, brands should strive to understand where the processes are good (even if inconsistent) and identify what can and should be replicated from channel to channel.



The Future is Bright

There seems to be a sense of optimism as the world shows signs of emerging from the grip of the pandemic. Although business leaders will endure the ramifications of COVID-19 for years to come, a lot was learned from this past year. CXMB Series research calls out the fact that some challenges remain, but also points the way toward what matters most to consumers. About a year since the world was forever changed, now is a good time for CX leaders to reflect, analyze, celebrate the successes, and refocus on the opportunities that remain. Now is also the right time to be bold in tackling the most stubborn challenges standing in the way of superb CX, while continuing to support and enable employees with renewed vigor.

Links:

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