

APRIL 2022 | QUARTER 2



# CX Insight

AN EXECS IN THE KNOW PUBLICATION

## Following the Data

Using CX research to better inform  
future strategies, priorities, and plans.

**UNDERSTANDING  
CHANGING CONSUMER  
EXPECTATIONS**

**DESIGNING A SUCCESSFUL  
WFH HYBRID MODEL**

**BRAND SPOTLIGHT: AIRBNB**

**SEVEN ESSENTIAL GUIDELINES  
FOR CREATING A SECURE CX  
WORK-AT-HOME ENVIRONMENT**





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*CX Insight Magazine*  
Issue X, April 2022

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# in this issue

## 05 UNDERSTANDING CHANGING CONSUMER EXPECTATIONS

Using consumer surveying to uncover evolving consumer expectations.

## 12 CREATING A WORLD WHERE ANYONE CAN BELONG ANYWHERE

Brand Spotlight: Airbnb

## 18 SEVEN ESSENTIAL GUIDELINES FOR CREATING A SECURE CX WORK-AT-HOME ENVIRONMENT

Making security the first consideration.

## 23 DESIGNING A SUCCESSFUL WFH HYBRID MODEL

Balancing employee experience with business goals and objectives.

## 29 THE NEW BEST PRACTICES FOR ECOMMERCE CUSTOMER SERVICE

The importance of people and relationships in the future of customer service.

## 35 CX RESEARCH: FILLING IN THE GAPS

Using CX research to better understand consumer behavior, opinion, and preferences.

## 43 NAVIGATING PROCUREMENT AND BPO AMID UNPRECEDENTED CHALLENGES

KIA Online Community Member Spotlight:  
Beth Pendleton

## 47 THE CLOUD IS CALLING

Is Your Contact Center Ready to Answer?





# Welcome to the April 2022 edition of *CX Insight* magazine, an Execs In The Know publication.

**Closing the distance with deeper insights.**

Customer Experience (CX) leaders are all too aware of the power of data in driving a broader vision and effecting future plans. Thankfully, internal operations aren't the only source of such insights. In fact, the CX industry is awash in research – much of it providing exactly the types of discoveries that can help influence leadership, embolden investment, and inspire innovation.

In this issue, we tap into CX industry research to take a closer look at evolving consumer expectations. But the insights don't stop there. We also review the comparison data between the recently released CX Leaders Trends & Insights: 2021 Corporate Edition report and the earlier released 2021 Consumer Edition report, examining the critical differences and alignments between the two.

Along with this deep dive into CX research, this issue also contains an insider's look at Airbnb through a special Brand Spotlight featuring Jerry Hong and Andy Yasutake, as well as a KIA Member Spotlight featuring Beth Pendleton from Humana. As always, we hope you'll find these and our other articles to be both informative and inspiring, especially as you develop and refine your own future CX plans. ✨

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# Understanding Changing Consumer Expectations

*by Execs In The Know*

The past 24 months have been disrupted in ways few could have expected. The pandemic and resulting transformation in the way we work, learn, shop, and live forced us to reset some of our expectations and behaviors. Many of these changes are here to stay, creating a new way of life and altering experiences and behaviors for the foreseeable future.

Execs In The Know wanted to better understand the shifts in consumer expectations for customer care given these disruptions. This article reveals the results of our research on changing consumer perceptions and behaviors over the past two

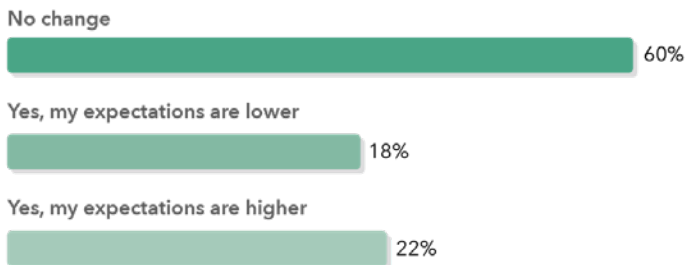
years. It also offers some considerations for customer experience (CX) leaders in adapting to this ever-present and ongoing change.

We asked more than 300 consumers to share their views in an online survey from March 3-8, 2022. Depending on how respondents answered, sample sizes for reported results range from N=182 to N=336. The resulting data and insights are important for CX leaders to understand as they drive operational and strategic plans. Let's start by looking at a snapshot of consumer expectations.

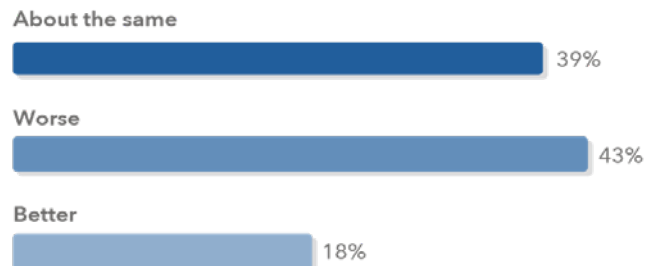
## Expectations Snapshot

When asked about customer care, 60% of respondents believe their expectations remain unchanged over the past two years, and 18% feel they are lower. Important, however, is the fact that 22% of consumers report that their expectations have increased. When asked about the quality of customer care, nearly half (43%) of consumers shared that it has declined over the past two years while 39% report stability. Only 18% feel customer care has improved.

Given the challenges posed by the pandemic, do you feel your expectations for customer care have changed at all over the past 2 years?



Given the changes brought about by pandemic, do you think the customer care provided by companies has gotten better or worse over the past 2 years?



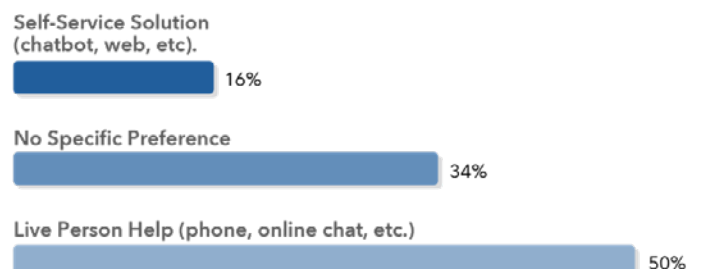
When asked about their expectations for consistency in the quality of customer care for all companies they do business with, consumers overwhelmingly (71%) say they expect the same level of support. Thirteen percent feel that they are entitled to better service based on spending more with a company. Only 15% recognize that not every brand can stand out for its customer support.

In perhaps one of the most surprising findings of the study, half of customers prefer a live person to help them resolve an issue or question. Equally as interesting is that 34% report no specific channel preference, and only 16% want to self serve.

Do you expect the same level of customer care experience from every company you do business with, regardless of the type of product/service you are buying?



Assuming your customer care issue would be resolved quickly and easily, would you prefer using a self-service solution or getting assistance from a live person?



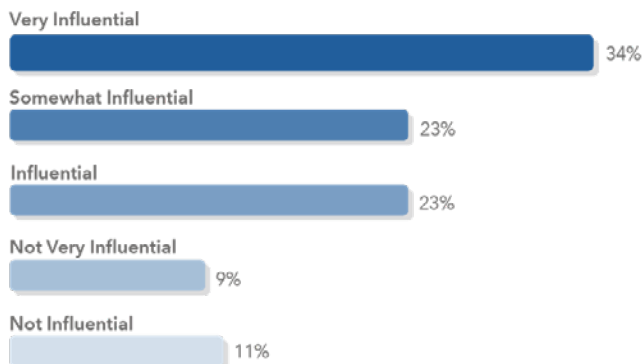


## The Impact of Experiences

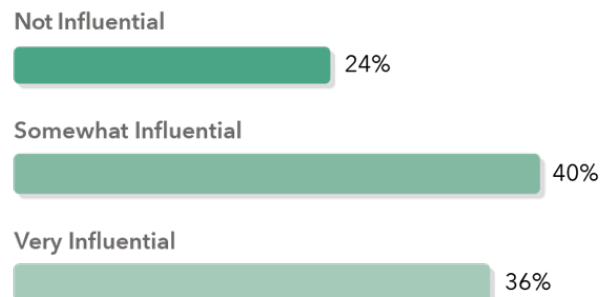
In addition to understanding expectations, we also wanted to learn more about the impact of experiences that occurred during the pandemic. The study revealed that 21% of customers stopped doing business with a brand because of a poor customer care experience.

Further, 80% of customers say that the customer care experience determines their brand loyalty. Only 9% report being not very influenced by the support experience, and a mere 11% are not at all influenced.

On a 5-point scale, how influential is the customer care experience in determining your loyalty to a brand?



How influential is a brand's positive reputation for customer care in determining whether you buy goods/services from the brand?



The study also highlighted the impacts of a positive brand reputation, with 76% reporting that merely hearing about a positive customer care experience influenced future purchasing decisions. Only 24% of consumers are unimpacted by a brand's positive customer care reputation.

## Insights to Action

This data helped us better understand the pandemic's impact on consumer expectations and experiences. While it is important to understand the data, what matters even more is how you action it. How can you use the learnings of this study to align your organization with these changed consumer expectations and improve your CX? Here are four considerations to spark action:

### 1. Lead knowing that change is pervasive.

In each question we asked about change, most consumers shared that the events of the past two years had, in fact, altered their customer care expectations and behaviors. To help deliver what customers want, your organization must be dynamic and ready for change. Leaders who understand the pervasiveness of change can ready their teams for this norm and its resulting impacts.



As a leader, you must be nimble, flexible, and champion change. In addition, you should find ways to model these behaviors so your team can see you in action and follow. A great way to do this is to connect the results of this study to your operational plan and goals. For example, does it change anything knowing that half

of the consumers in our study reported that their expectations have changed over the past two years? How might you alter or sharpen your focus based on this knowledge? Reminding your team that every interaction matters is a great first step. We all know this to be true, but keeping the message front and center can increase awareness and consistency. Another way to prepare for inevitable change is to look at your employee development plans. Is your organization creating managers, supervisors, agents, and support staff that accept – and even embrace – change? What tools do they have to find comfort in the unknown? Leading an environment that focuses on inevitable change can increase psychological safety and reduce fear when change occurs. Our world is more dynamic and moving faster than ever before, and embracing and living the adage, “the only constant is change” is an attribute of great leaders.

**2. People want people.** Based on the findings of this study, the human touch trumps technology. This revelation may surprise some, but it likely makes more sense when you consider that we have lived through months of shelter-in-place restrictions and interacted with very limited in-person interactions. Considering this finding as directional data, what should you do next? Look at your customer! It certainly should make you want to learn more about your own customer base. And, you may not have to start from scratch. Does your Insights team have similar voice of the customer (VoC) data? Partner with that team to find out and get more details about your customers. If that team does not have this specific data, commission a study of your own. A good starting place is a touchpoint study to learn about your own customer preferences. A well-designed and executed touchpoint study can tell you what channels your customers prefer for top contact



drivers. Self service for starting the returns process? Phone for a concern about account security? SMS to get an update on tracking delivery of an order? Asking is the sure way to know what your customers want! A touchpoint study can also help you prepare for the future. Consider including channels you are investigating as you optimize your strategy. This is a great way to find out if your customers really want to contact you via Facebook Messenger or any other new channel, for that matter. The results may surprise you! Regardless, VoC data and insights should be connected to your operational plan, team goals, channel strategy, and strategic roadmap. These insights can provide much more than post-contact data; they can help you understand perceptions and expectations more broadly. Don't just do it once; regular and consistent studies help us prepare for change. And we already know change is coming...

**3. Reputation matters.** A lot. This study revealed that customers are influenced by their own experiences as well as the experience of others. Customer

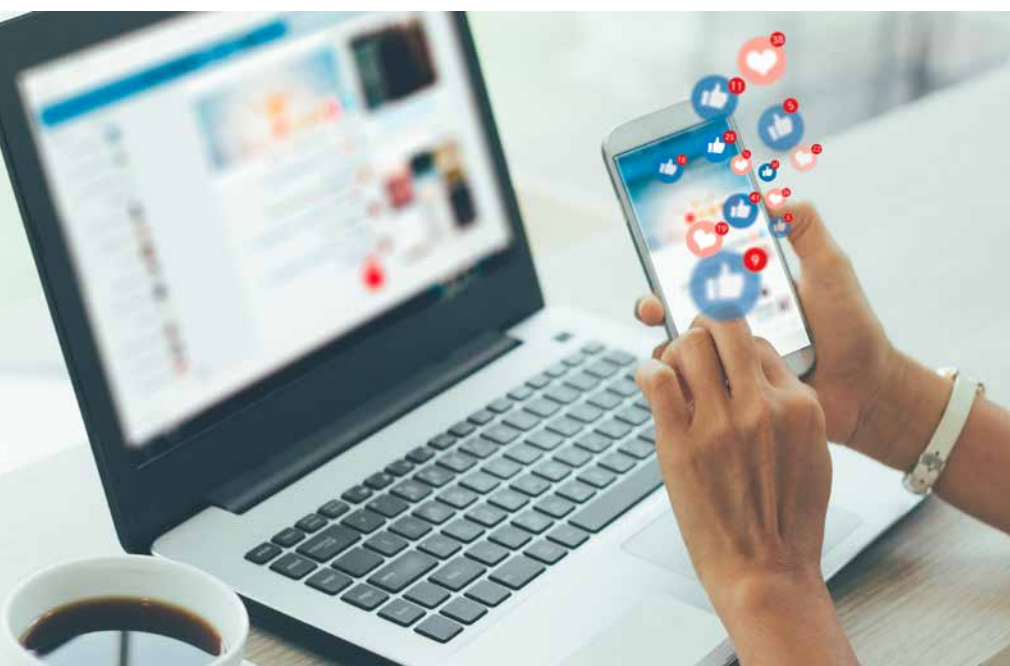
expectations and loyalty are impacted in two ways: by the direct interaction customers have with your brand and by the opinion others have about an experience. Word of mouth about customer care experiences has been around since the first contact centers, and word of mouth was born shortly after internet usage became widespread. Today, social media has given consumers more power than ever. Whether on their own social media channels or on a review site, customers can easily share their opinions. And, according to this research, the power of influence is strong.

What actions can you take? First, know where you stand. Use a web scraping tool to measure sentiment and see exactly what your customers are saying. Chances are, your customers are using social channels to highlight their preferences, discuss their likes and dislikes, and maybe even interact with you. This text data can be easily collected for sentiment analysis with a social media scraping tool. Insights teams can use these tools to gauge and analyze conversations using an organic approach.

Second, share the results of these reports with your frontline. This awareness will help reinforce the skills they learned in training, particularly for negative interactions. Training on diffusion of anger, problem resolution, empathy, and active listening can turn a negative experience into a positive one. And being a brand advocate is a must for all contacts!

#### **4. Share and share alike.**

Speaking of sharing, do you have a robust communication plan for VoC and other impactful data? Sharing this information with your teams will



increase their knowledge and awareness of changing customer expectations. The communication can cross any number of channels, including, but not limited to, fireside chats, town halls, dedicated intranet pages, and email updates. Consider a periodically rotating item on your team meeting agenda to share this type of information. It is a leading practice to blend dynamic communication channels with static ones for variety. Static communication can be used to inform, and dynamic channels provide ways for employees to participate in the conversation, ask questions, and interact with leadership. And don't just tell your employees what's changed; include them in what's next. Create ways for your team to respond to changes in customer expectations, such as identifying solutions and next best actions. Crowdsourcing ideas and upvoting the best ones is a fun and easy way to get input from the frontline. Another great way to keep them informed and engaged is to set up brainstorming sessions, roundtables, or focus groups to identify next steps. Thought-starters can include: What do they think of this information? What ideas do they have about how to respond? What would they change to address the learnings from the insights? These types of exercises can be informal and fun as they build trust and rapport across the organization. More formal ways to include employees are also available to you. We already talked about partnering with your insights team to learn more about the voice of your customer. You can also expand this partnership to use more formal methods to include the Voice of the Employee (VoE). A quantitative study is a great way to uncover untapped knowledge in the contact center! Consider expanding your existing VoE survey program to include gathering feedback on the results of VoC studies. For employees

who may not feel comfortable sharing ideas in informal or public settings, a VoE pulse survey may be just the thing to increase their knowledge and engage them in solutions. Once you get the results, ensure you close the loop with your team and tell them what you are planning to do with the information they shared. Following up is integral, since it keeps employees engaged and helps them feel heard.

## Conclusion

As we face a future that's more dynamic than ever, understanding the needs and preferences of our customers and preparing our employees for this inevitable change is an important role for leaders. Leading through change is essential to success! Staying abreast of changing expectations, communicating what we learn, and updating operational plans accordingly are three key considerations for the future.

Strengthening our partnership with the insights team or organizations that can help us understand and interpret the customer's voice will help us stay in the know and ahead of the change curve. As brand ambassadors, employees have a voice that should also be heard and considered when adapting to change. Organizations that have a clear plan to incorporate customer insights, create solutions that meet changing expectations, and keep employees engaged along the way are sure to win in our ever-changing world! 🌟





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K. Carlton, Sr. Director,  
Customer Experience,  
Cars.com

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## AN EXCLUSIVE COMMUNITY FOR CX LEADERS

The Know It All (KIA) online community is an exclusive community for end-user CX leaders who need a private space to ask questions, bounce ideas around, and build their network.



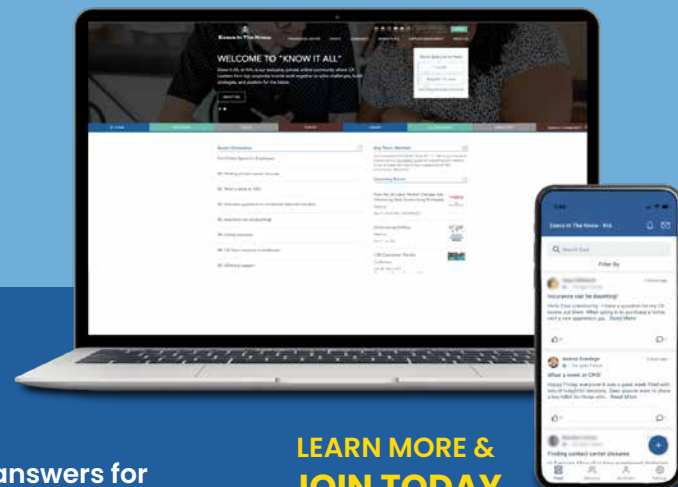
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# BRAND SPOTLIGHT

## Airbnb

Creating a World Where Anyone Can Belong Anywhere

An interview with Jerry Hong, Product Lead, AI/ML and Data Platform at Airbnb, and Andy Yasutake, Global Director of Platform at Airbnb.

Jerry and Andy are a dynamic pair, powering many of the CX innovations taking place at Airbnb. Execs In The Know recently had a chance to catch up with the two who were kind enough to tag-team a series of questions aimed at providing insight into the Airbnb story, especially as it pertains to the company's mission and its unique philosophy on the customer experience.

**Execs In The Know (EITK): Please share a little bit about your background, how you came to be at Airbnb, and describe the day-to-day focus of your current role.**

**Jerry Hong:** It all started with a tennis match. A longtime friend of mine and I were battling it out, and during one of the changeovers, we started chatting about life – work, travel, future plans, etc. He told me about his amazing experience in his five-plus years at Airbnb. Naturally, the topic came up on whether I would be interested in exploring new opportunities.

At that time, I was still enjoying my role at Electronic Arts as the Director of Product Management, leading the Data & Artificial Intelligence (AI) organization. Little did I know that one seemingly normal tennis session would



turn out to be a life-changing game, set, match. One conversation led to another and now, coming up on my one-year anniversary with the company, I couldn't be happier to have gotten the opportunity to join the Airbnb family.

In my current role at Airbnb, I'm the Product Leader for the Intelligent Support Platform Products team, which builds the core foundation to power and democratize intelligent automation and data within Airbnb, unlocking our ability to provide a world-class customer experience at scale to our Community of guests and Hosts. The team has delivered amazing



**ANDY YASUTAKE**

Global Director  
of Platform



**JERRY HONG**

Product Lead,  
AI/ML and Data  
Platform



[intelligent automation advancements](#)<sup>1</sup> in 2021, and I'm incredibly excited to continue this journey with the rest of the team for many years to come.

**EITK: How would you describe Airbnb's culture, values, and overall mission when it comes to serving both guests and Hosts?**

**Andy Yasutake:** Airbnb is a truly unique company to be a part of – an absolute unicorn. This word, unicorn, helps sum up a company that is rare and mythical, which Airbnb definitely is. From its very beginning, Airbnb has been a purpose- and mission-driven company. Airbnb's three co-founders, Brian, Joe, and Nate, have helped guide the company to do work that serves multiple stakeholders, building a Community where people live, work, and focus on our employees as key differentiators. This is very different compared to many other companies that focus on shareholders and financially motivated drivers alone.

The Airbnb mission is to, *"Create a world where anyone can Belong anywhere."* Belonging is such a personal thing, specific to everyone's own situation and life experiences. If Airbnb can help facilitate just one small feeling of Belonging for an individual staying in a

stranger's home in a different city or foreign land, this is when the magic of our platform shines through.

The culture we foster at Airbnb, our Core Values that drive *how* we work and the focus on our Community of guests and Hosts first, is what differentiates us – not as a brand that is well recognized globally in 221+ countries now – but instead, as a place where everyone can literally Belong anywhere. There is magic when this happens – for our employees, our Community, and for all of Airbnb. I'm excited to be a part of the present and the future.

**EITK: What does a typical customer success engagement look like at Airbnb? On which channels are you and your team serving guests and Hosts? Is the approach different between guests and Hosts?**

**Jerry:** Airbnb's goal is to provide support wherever and whenever our Community needs us. To realize this vision, we offer our Community the option to contact one of our highly trained "Support Ambassadors," as well as provide access to our intelligent, self-service channels, including Airbnb Help Center, Airbnb Chatbot, and others. Whatever channel or combination of channels our Community of guests and Hosts decide to utilize, we aim to resolve their issues as efficiently as possible, helping them get back to their journey.

At Airbnb, we recognize that one size does not fit all. For instance, a new guest who just joined our Community will most likely run into very different issues compared to those of our Superhosts. To address the various needs of our Community, and to provide efficient support across all of our channels, context is key. Understanding this, we have made







investments to unlock personalization at scale.

This past January, our world-class team of engineers shared a [blog post](#)<sup>2</sup> on how Airbnb's Intelligent Automation Platform creates the foundation that enables Machine Learning (ML)-based issue detection, accelerating how Airbnb provides amazing customer experience at scale. The blog post mentioned in my earlier response also references our initial use of this Automation Platform to power a holistic self-serve experience for both the guests and Hosts, assisting in pre-trip, mutually agreed-upon cancellation scenarios via automated workflows. Check out both articles to learn more!

**EITK: Self-service and autonomous solutions have never been more important in helping consumers get what they need, easily and conveniently. Regarding this space, what are some of the technologies where Airbnb is most heavily invested, and what's coming next?**

**Jerry:** At Airbnb, we employ (and continue to invest in) various cutting-edge AI/ML technologies to power intelligent resolutions for both guest and Host issues, while also more accurately understand user intents through the use of conversational AI. We are very fortunate

to have a world-class ML team that constantly trains, iterates, and deploys various AI/ML models (e.g., intent classifications, automated speech recognition, sequence-to-sequence learning, large-scale unsupervised training, task-oriented dialog systems, generative language models, etc.), enabling us to apply and leverage these exciting technologies as a part of our toolkit.

I'm constantly amazed by our teams, by how they are able to innovate new approaches that leverage ML technology to address key business challenges.

Another recent blog published just last month shares Airbnb's approach for tackling a very common problem: the inability to run a truly randomized controlled experiment, whether due to operational/business constraints or the challenges of obtaining a large enough sample size. The solution? [Use ML-based causal inference](#)<sup>3</sup>! Our team has developed an "ACE" up our sleeve.





Airbnb has already anticipated the importance of using intelligent automation and AI to unlock and power personalized support in the future. Huge investments have been put in place to help transform how Airbnb provides a world-class customer experience at scale. But honestly, we've only just begun scratching the surface on what's possible. It's an incredibly exciting time to be on the team, and I can't wait to share more in the future. That said, I'll leave one general area that is always top of mind for me. This is something that I constantly challenge my team to overcome every day ... having amazing technology is great, but how do we best harness that power and democratize it so that it is accessible and easy to use across all of Airbnb? How do we empower all of our teams to create magical and exceptional experiences for our Community of guests and Hosts, especially in times when they need us the most? Stay tuned!

**EITK: How is Airbnb using Voice of the Customer and other program data to improve the customer experience? From where does this data originate, and how is it being managed and actioned?**

**Andy:** At Airbnb, we believe that our engaged Community of global guests and Hosts are the core reason we have been successful as a company. Our platform is fully built on trust, something required in a multi-sided marketplace. Our Airbnb global marketplace platform helps connect guests with unique listings of Hosts, and with experiences where guests can have an opportunity to "live like a local."

Understanding these principles, the only way we can improve our overall experience (and the services we provide to our Community) is by truly and continuously listening to the Voice of the Community (VoC). We do this, but we also make data-driven Community experience improvements over time, leveraging the trust we build as our Community uses our platform time and again.

The rich VoC data we have comes from many captured signals which we inspect and

analyze, turning these Community insights into actions each and every day. We have invested in dedicated teams that are passionate in providing VoC insights and transforming them into actionable improvements to address frustration that may stem from existing Airbnb policies, product, or operational challenges. We take these Community insights seriously, and we give our leadership high visibility into what we've learned and our plan of action. Airbnb takes a shared accountability approach across the whole company, collectively making progress in improving the overall experience. Many of these pain points are a direct view into unintentional friction points that the Community could experience, so getting this right is key.

How we collectively filter the signal from the noise to improve Airbnb's product and service experiences requires robust feedback mechanisms that consist of ML-based sentiment analysis tools, in-context surveys, speech-to-text voice analytics, and old-fashioned case categorization of CS interaction issues that take place every day on our platform.

With the combination of focus, investment, prioritization, and rigor, we believe that we will only continue to improve the overall experience for our Community. Furthermore, we believe improving the experience is key to the long-term success of our global Airbnb platform.

**EITK: Many companies have ascribed to the idea that happy employees make for happy customers. What is Airbnb's philosophy in this regard, and what are some of the ways those beliefs are being put into action?**

**Andy:** It is well known that strong levels of employee engagement within a company are statistically correlated to employee happiness and/or job satisfaction. This is typically captured with annual employee surveys, which is one method we leverage at Airbnb. The global pandemic has shown us that many of the things that employees appreciate most have changed. Here are a few of the things we do to continue our world-class approach to employee engagement during this challenging time:

**1. Transparency** - Prior to the global pandemic, Airbnb's culture of internal transparency was already world-class. Our CEO, Brian Chesky, would host live weekly or bi-weekly CEO Q&A Chats in person, answering the top five questions voted on by employees prior to the session. The open topics could range from the latest company strategy to employee-level topics – always answered as directly and transparently as possible, both by Brian and the executive team. When the start of the pandemic occurred, this transparency went to a whole new level, with specific steps that were being taken on a week-to-week basis as the company saw 80% of its global business drop within six weeks of the global pandemic starting. Brian and the executive team decided to do weekly Zoom CEO Q&A sessions for the whole company, keeping everyone in the loop with every key decision that impacted the company, internally or externally. When there were tough decisions made at the time to impact the global workforce, there was focus on the individuals being impacted and how Airbnb could help individuals land on their feet, which became a connecting force for all employees. How and why decisions were being made, and why it mattered to employees, is what brought engagement to a whole new level. There was a high level of consistency in this transparency, even as the business turned around. This helped every employee feel like they were connected and that they "Belonged" as the company navigated those trying times. Even today, we continue to have incredibly transparent CEO Q&A chats, and this forum continues to drive clarity, connection, and alignment across the Airbnb organization.

**2. Living our Core Values every day** - At Airbnb, our Core Values are a foundation for our global culture. These Core Values are not something easily understood during

"New Hire Check-In" – a week-long (virtual for now), onboarding process across all roles and job levels, where each new Airbnb employee learns about everything they need to know to work successfully at Airbnb. Instead, these Core Values became a fundamental part of how we work together. Whether we're working in the San Francisco, Singapore, or Dublin, no matter where we go, there is a foundational set of principles that we live and work by. These drive a connection wherever we live and work.

**Be a Host** - The Hosts on our platform create unique listings and bring the local places to life. To have a "Be a Host" mindset means employees engage with each other in a constructive and helpful way, like someone who is hosting a guest at their own place.

**Champion the Mission** - Each Airbnb employee strives to champion our mission to create a world where anyone can belong anywhere. To do this, we are asked to row the boat together to achieve this mission, a mission bigger than our individual selves.

**Embrace the Adventure** - This Core Value has been used heavily the last few years. At times, it seemed every week was a new, unexpected adventure that we had to assess, react to, and change direction to support our Community's needs. This Core Value has allowed individuals to adapt to the change that has constantly been thrown our way, and has helped us make a continued difference to our Community.

**Be a Cereal Entrepreneur** - The wordplay on cereal goes back to the Founders story of making cereal boxes to raise money to keep Airbnb afloat in the early days. This Core Value allows individuals to think outside of the box and innovate, without constraint, to create solutions that work in support of our Community.

It's an exciting time for our employees at Airbnb. How we live our Core Values helps us move forward together in this ever-changing world.

**EITK: When you look out into the second half of 2022, which Airbnb initiatives are you most excited about? What's going to move the CX needle the most for Airbnb guests and Hosts?**

**Andy:** It's an exciting time to be at Airbnb. Exciting is a word that has had different meanings over the last few years, and "exciting" hasn't always meant simple and straightforward plans. We've had to adapt constantly to our global Community's needs, and this means continuously adjusting our plans accordingly. If we project out to the second half of 2022, the exciting initiatives that we are working on align to the unique needs of our guests and Hosts. As we've learned from one of Jerry's previous responses, one size does not fit all. The needs of a guest or Host will vary based on who they are, what part of the journey they are on, and what their specific needs and expectations are.

The general theme we're working toward in the second half of 2022 is to prepare for our Summer Peak travel season, when we see the largest volume of travelers staying in Airbnbs. This is especially true in the northern hemisphere. But with this preparation, we're looking to create end-to-end solutions that focus on understanding the context of the user, who they are, and what their situations are so we can provide contextual, timely, and relevant support to our guest and Hosts, wherever and whenever they need support from us. I will also add, watch closely for some announcements coming out soon from



our CEO. There are exciting things ahead, and we're actively working on capabilities for our Community that we are very excited about. And you will be, too, when you stay in your next Airbnb! 🌟

#### Links:

- 1 <https://medium.com/airbnb-engineering/task-oriented-conversational-ai-in-airbnb-customer-support-5ebf49169eaa>
- 2 <https://medium.com/airbnb-engineering/intelligent-automation-platform-empowering-conversational-ai-and-beyond-at-airbnb-869c44833ff2>
- 3 <https://medium.com/airbnb-engineering/artificial-counterfactual-estimation-ace-machine-learning-based-causal-inference-at-airbnb-ee32ee4d0512>



### Execs In The Know

Execs In The Know partners with brands that are providing outstanding customer service (CX) experiences. The Brand Spotlight Series showcases innovations and solutions to CX challenges faced by today's leading brands.

Thank you to Jerry Hong, Andy Yasutake, and the entire team at Airbnb for contributing to the Execs In The Know Brand Spotlight.

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Making security the first consideration when building your technology stack is the key to successful scaling and shifting.

# Seven Essential Guidelines for Creating a Secure CX Work-at-Home Environment

by **Wayne White, Chief Information Officer**  
and **Art Burt, Chief Information Security Officer**

In early 2020, conventional wisdom across the BPO industry predicted that CX was going digital. As a result, companies would largely return to in-house customer support thanks to a sweeping decrease in the need for customer contact requiring human interaction. However, when COVID hit, we all learned differently. Not

only did it become impossible to staff internal CX operations in a timely manner, but even as the customer experience went digital in a big way, much more guidance and personal interaction were needed. Many outsourcing brands which already had at-home footprints found it challenging to ramp up to meet demand. However, clients did expect their CX partners to do so – and quickly.

## Focus on People, Process, and Technology

Those first few months of the pandemic were a sprint to get agents up and running at home. Some organizations, especially those with significant at-home operations, made the decision to scale existing solutions to accommodate the growth in capacity. Others like ResultsCX built a new platform from scratch, benefiting from the ability to incorporate far stronger security measures in a brand-new system. That's when many organizations learned that there are three make-or-break components of home-based support, and security is a big part of all of them: people, process, and technology. To start, you need people who understand how to work in a virtual environment. Then, operating processes must be completely shifted and adapted to match a virtual environment; security considerations must apply to every altered process, as well as to every change in the technology involved which, in many cases, needed to be completely re-architected.

Think about the former contact center environment, where managing core security practices was systematized until it was practically effortless; everything, from a clean desktop to what showed up on agent PCs, was constantly monitored on the production floor. In the new world, every PC sitting in a home is in essence a contact center, with its own network that must be kept secure. Now, every function needs to feed into a single secure platform. Systems for training, coaching, and monitoring have had to be reimagined and scaled in ways that had never been done before. Those who skipped this necessary step opened themselves up to security risks, as well as network penetration and hacking.

Managing all these networks also requires managing the increased risks, whether data leaks, privacy breaches, increased credit card fraud, or other serious threats. In many cases, clients used third parties as technology partners for going to work-at-home, which means BPO companies had to integrate with many more partners. In essence, the security threat quintupled overnight.

## Helping Clients Handle Security

Having established a strong security stance involves the commitment to security measures at the highest level. It also means that you apply strict controls to your systems and processes and limit access whenever and wherever necessary. A beneficial effect is that you become a resource for your clients. Several times a week, ResultsCX holds security reviews with our clients where we examine their security configurations and offer expert guidance on implementing additional security and compliance best practices. Many clients



ResultsCX has successfully created a secure virtual CX environment, earning a near-perfect 800 score from BitSight and the number 1 ranking among our competitors for more than 20 months running.

realize that our daily diligence with managing security across multiple industries makes us a source of knowledge on new or unexpected threats, as well as trustworthy advisors on steps to take and tools to implement. Recently, a client reached out to our Information Security team with questions about adopting a new cloud

ACD platform. Five years ago, such outreach by our clients was almost unheard of. Typically in the past, a client led the charge when it came to security requirements. Now, they have seen our success at maintaining a secure environment and want our advice on how to always be prepared for the inevitable attacks of hackers, phishing, and other attempts to breach system protections.

## **Web Log-In Access and VPN — What Can Go Wrong**

One way organizations accommodated their new remote workforces was to simply allow agents to access applications with web passwords and logins from home, without taking into consideration that this could now involve thousands of agents across multiple vendors. In many instances, there was no way to monitor access, which opened up clients to epic levels of fraud. In a situation like this, one to five percent of agents are likely to do something inappropriate or potentially even break client, industry, state, or federal regulations. Once system access was opened up on the web, hackers across the globe were eager to take advantage of limited ability to block their access.

Many organizations entered the work-at-home era with VPN systems that supported standard general and administrative staff, but these VPNs are not designed for working with customers and in patient accounts. Many of the CRMs and primary software tools weren't even reconfigured for work-at-home. This meant an employee could work on a VPN for a while, then log off to spend personal time on the internet. If the employee accidentally downloaded a virus, it now had an infection path straight into the company network the next time that employee used the VPN for system access.

During the transition to widespread working from home, large BPO providers have been hit by ransomware and brought down by malware

left and right. Almost without exception, these attacks entered through technology the business already used and assumed would scale effectively. What had been thought to be a secure, stable platform really was a stable, but not universally secure platform. The vulnerability posed by VPN on home PCs was not recognized; bad actors caught on early and quickly seized on the opportunity.

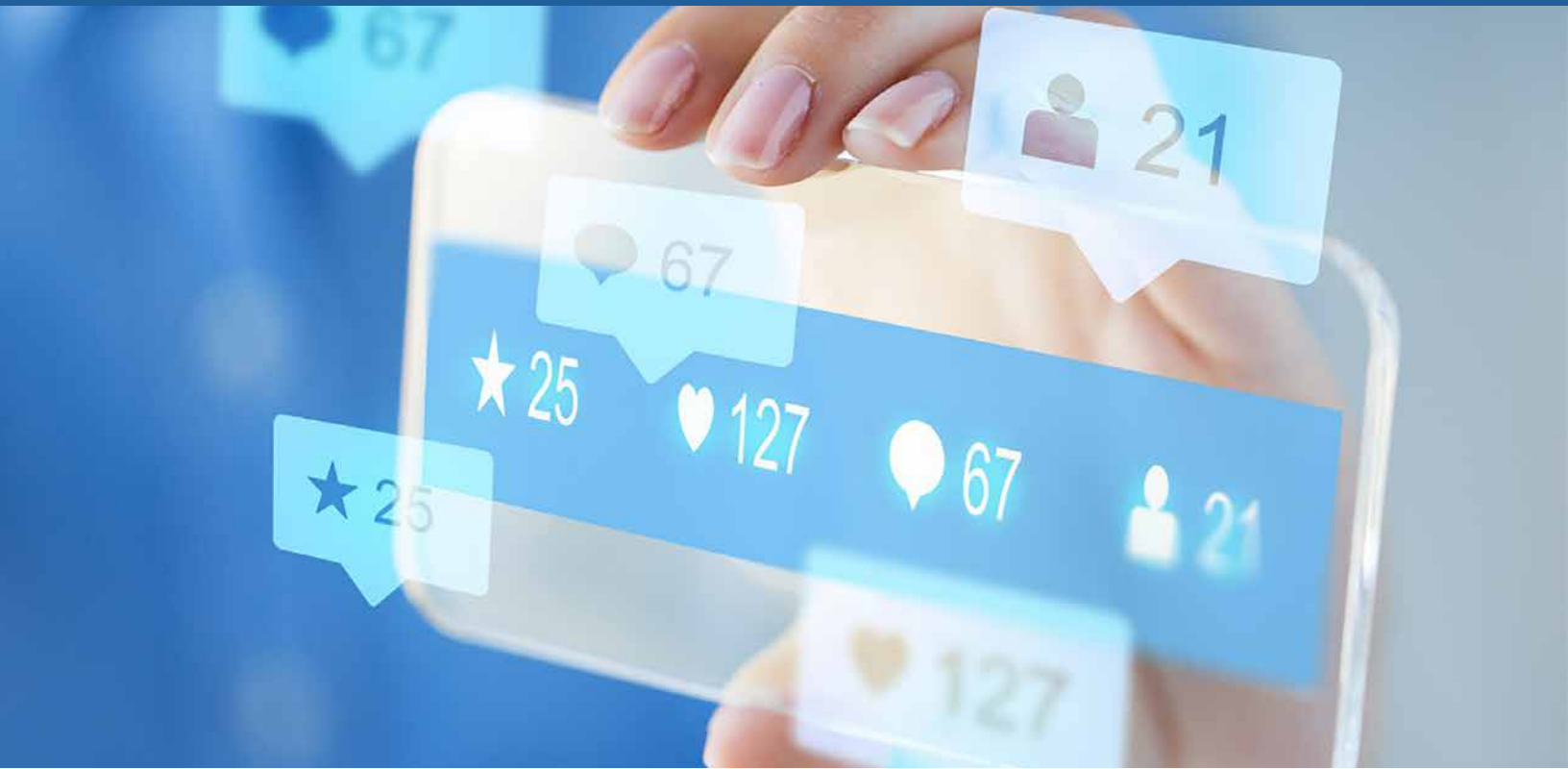
## **A Fundamental Focus on Security**

Building a new platform from scratch allows you to focus on security at a fundamental level. Even end users become part of the security team, watching for indications that an interaction or transaction isn't legitimate. At ResultsCX, security is at the core of everything we have built. For example, we were almost completely launched on Windows Virtual Desktop (WVD) 1.0. for our at-home agent interface when security considerations gave us pause. Ultimately, our choice was to leapfrog to a higher level of security effectiveness. We instead chose to work directly with Microsoft as a strategic development partner to build out our own platform on WVD 2.0. The collaborative build with WVD, now known as Azure Virtual Desktop, was so robust that it has taken on a life of its own. In this same vein, we've also realized the value in bringing on a certified chief information security officer into decisions that affect processes and technology. Security is always the first consideration now whenever changes are planned.

## **Seven Essential Guidelines for Creating a Secure CX Work-at-Home Environment**

ResultsCX has successfully created a secure virtual CX environment, earning a near-perfect 800 score from BitSight and the number one ranking among our competitors for more than 20 months running. Underpinning this track record are the following guidelines that can help other CX providers who hope to follow in





our footsteps.

- 1. Tighten up overall enterprise security and permissions.** Look at the technology layers you've built out and ensure each one is rock solid. Every new tool builds on this foundation, and existing problems will be magnified when you add an at-home workforce to the mix. A crack in the foundation can quickly result in tens or hundreds of thousands of people experiencing the same issue or vulnerability.
- 2. Stop trying to balance security against openness and communication.** Communication tools can create significant security risks. Help employees figure out how to connect, but securely.
- 3. Make security the very beginning of every conversation.** Discuss security first before you deploy an individual tool, and again with each layer that you build out.
- 4. Stop thinking you need to save all that**

**data.** Large amounts of saved data can be a massive source of threat. Lower risks by removing any non-essential data. If you don't save data on a widespread basis, you are a less interesting target for hackers. Conduct an overall review of your data retention and find ways to limit it.

- 5. Examine every potential risk point in your service environment.** When it comes to the systems that support your work environment, know which are absolutely required for operations. Everything else needs to be eliminated to make your operations far more secure.
- 6. Undergo regular third-party risk assessments.** Find an outside company to regularly assess risk on your actual platform. ResultsCX also performs risk assessments for multiple clients, looking at their technology to find holes in it. Four eyes are always better than two when assessing the security of your base infrastructure,

especially when it comes to at-home infrastructure.

**7. Make security a mandatory employee responsibility.** All employees need to know their obligations when it comes to maintaining security. If you can't get buy-in from the whole company, you're always going to have issues. Backing the commitment to security is a decision that begins in the C-Suite decision and extends all the way to frontline employees.

A common misconception in many organizations is that if they lock everything down, they can't do business. That's not true. You can restrict access, follow stringent security practices, achieve stability, and still operate successfully as a company. But inevitably, companies that try to negotiate on security practices fall prey to the same mistake. They build their solutions and only then try to apply security. Making security the first consideration when building your technology stack is the key to successful scaling and shifting. It's an

essential approach that can no longer be treated as optional.

Finally, choose partners who are every bit as security-conscious as you are. If you're dealing with a partner who has a low security rating, ask yourself why you are doing business with them. With the interconnectedness of the world, having a vendor that doesn't take security at least as seriously as you do increases your vulnerability regardless of your practices. We all must operate on the assumption that we will get attacked at some point, and our security systems need to be as strong and prepared and possible.



**Wayne White**  
Chief Information  
Officer, ResultsCX

Wayne leads all information technology functions for ResultsCX. He brings a broad spectrum of experience from more than 25 years in technology. Wayne's core areas of expertise include the development of new IP and network designs, processes, products, and tools to enhance business solutions and client offerings.



**Arthur Burt**  
Chief Information  
Security Officer,  
ResultsCX

Arthur leads Security & Compliance for ResultsCX and is a proven high-level manager of security teams and programs. He has 30 years of BPO experience that includes 20 years in IT leadership as IT Chief of Staff, CISO, and Solutions Architect Team Leader, in support of 50K+ employees and 300+ clients.



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For more information, visit:  
[Results-CX.com](https://Results-CX.com)





# Designing a Successful WFH Hybrid Model

*by Execs In The Know*

Customer experience (CX) leaders know that strong customer relationships benefit brand performance. This knowledge drives CX professionals to identify and implement practices that deepen connections with customers. These leaders flourish in like-minded organizations that focus on measuring and improving the customer relationship to improve business outcomes.

The same is true for employee relationships: Companies that prioritize the employee experience are winning the acquisition and retention game, particularly in the face of [The Great Resignation](#)<sup>1</sup>. As the pandemic eases and the way work gets done stabilizes, the work-

from-home (WFH) hybrid model is a top choice for many organizations. And, based on [recent research](#)<sup>2</sup>, this paradigm is here to stay.

The WFH hybrid model looks different for every organization, but it essentially allows employees to rotate between working in the office and from home or another remote location. Another version of this model requires some employees to be in the office full time, while others are remote. This approach is designed to give employees the flexibility that they became accustomed to after working remotely through the darkest months of the pandemic.

The success of the hybrid workplace hinges on an organizations' ability to balance the experience of in-office and remote workers with business goals and objectives. It requires a transformation in the way leaders plan, direct, and engage employees in their organization. Although many factors contribute to a successful model, technology and employee well-being surface as two critical focus areas for leaders.

## Technology

The backbone of a hybrid workforce is a technology stack that supports workflows, processes, and systems efficiently and effectively. At the beginning of the pandemic, companies hustled to get remote employees access to "must have" technology to allow work to continue. In customer support, this technology included the hardware and software needed to allow agents to receive contacts and handle customer needs.

While thinking back on these early pandemic days may cause many to shudder, the good news is that most organizations report a stabilization of the tech stack required to accomplish basic business goals. In today's WFH hybrid environment, leaders should shift from focusing solely on the basic tech stack that enables **what** is accomplished to investments that improve **how** work gets done, including collaboration and security tools.

## Collaboration Tools

Technology to help employees be as productive and comfortable as possible is at the top of the priority list. Executives are funding investments in tools that enable better virtual collaboration.

Workplace collaboration, whether in person or remote, is a modern corporate mainstay, and employees need to feel connected to work better together. Collaboration tools





TYPES	1. CLOUD DOCUMENT STORAGE, SHARING, AND EDITING	2. PROJECT AND TASK MANAGEMENT	3. MESSAGING, CALLING, AND VIDEO CONFERENCING	4. ONLINE WHITEBOARD
BENEFITS	<ul style="list-style-type: none"> <li>Secure and accessible storage</li> <li>Collaborative editing and version control</li> <li>Cost-effective bundling</li> </ul>	<ul style="list-style-type: none"> <li>To-do list creation</li> <li>Reminders of upcoming deadlines</li> <li>Input requests from colleagues</li> </ul>	<ul style="list-style-type: none"> <li>Central hub of communications</li> <li>Voice, video, and text capability</li> <li>Direct private or public messages to individuals or groups</li> <li>Private and public channels</li> </ul>	<ul style="list-style-type: none"> <li>Complement to interactive exercises</li> <li>Innovative and unique online experience</li> <li>Visually engaging and fun interface</li> <li>Export input to other software</li> </ul>
BRANDS	Microsoft 365 Google Workspace Dropbox	Asana Trello Smartsheet Monday.com	Zoom Slack Google Chat Microsoft Teams	Miro Google Jamboard Microsoft Whiteboard Mural

can improve efficiency and productivity, as well as make it easier and fun for employees to connect. Online collaboration tools have flooded the marketplace, but four types warrant attention and further investigation. Many organizations have base versions of these tools, but examining new features and expanding functionality is trending.

### Security Tools

A second area of tech investment is in tools and practices that strengthen the information technology (IT) infrastructure to secure and stabilize connectivity. Ensuring that employees – particularly those outside the corporate office – have stable connections to safely access systems and data has been a priority throughout the pandemic. However, as the WFH hybrid environment gains popularity and acceptance,

companies are making investments to shore up these tools and upgrade security practices.

For secure and stable access, some companies are expanding partnerships with internet service providers (ISP) and virtual private network (VPN) vendors. For connectivity, organizations are working to better understand the demand generated from remote employees and identify secure and reliable solutions to support those needs. Working with ISPs, companies can regularly and consistently trace connections, measure signal strength, and detect outages to ensure stability for employees. VPNs provide a secure tunnel to identify employees and grant access to systems and data, as appropriate. These networks allow the protected transfer of data and enable remote access to critical platforms and information.

In addition to enhancing technologies that support security, companies are also optimizing internal security-related practices. Enterprise-wide efforts can have widespread positive impacts on the WFH hybrid environment. Practices such as requiring employees to use multi-factor authentication (MFA), implementing regular password changes, and overhauling cybersecurity training are proven ways to help keep data secure. These practices, combined with technology enhancements, are helping organizations avoid security mishaps, stabilize connectivity, and increase awareness of critical issues. They can also reduce unnecessary frustration and issues, improving the employee experience.

## SECURITY PRACTICES CHECKLIST

- ☒ Manage all employee devices
- ☒ Force password changes and use encrypted password software
- ☒ Update and deliver security training regularly
- ☒ Create and adhere to a proactive system maintenance plan
- ☒ Require connection via VPN
- ☒ Enforce MFA
- ☒ Keep enterprise software updated
- ☒ Ensure video meetings and other collaboration tools are secure
- ☒ Make it easy for employees to ask questions and report connectivity and security concerns

## Employee Well-Being

Of the areas critical to a successful WFH hybrid model, employee well-being is at the top of the list. Leaders frequently say that employees are the most important part of the business, and investing in programs that focus on their well-being is a great way to act on that statement.

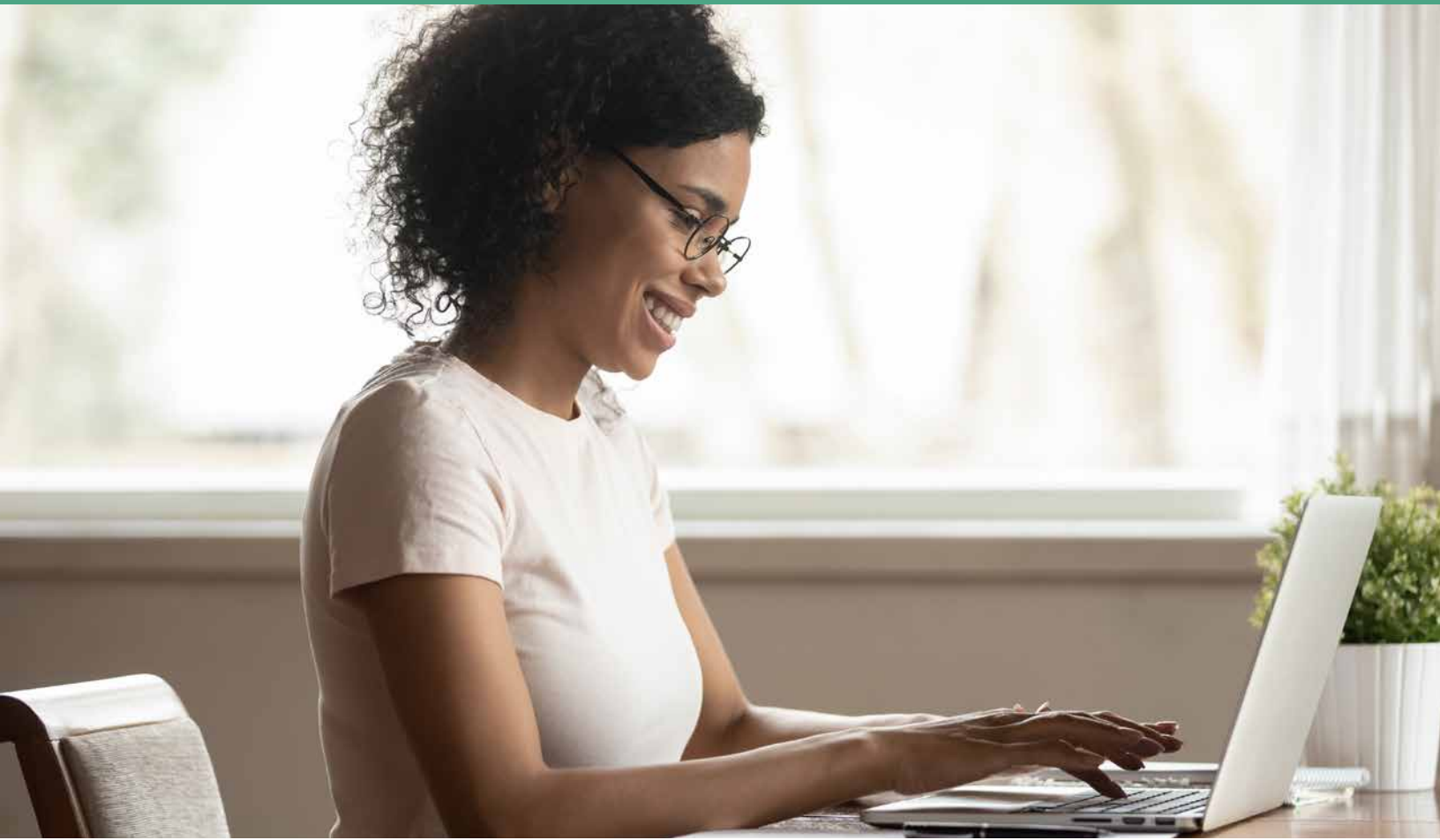
Employee well-being impacts employee engagement. It is no surprise that engaged employees are higher performers and deliver far better outcomes than disengaged workers. Recent research takes this notion further: [Gallup recently discovered](#)<sup>3</sup> that engaged workers that are not thriving in their lives are much more vulnerable and add risk to an organization.

### SEVEN CATALYSTS OF WELL-BEING

1. **DEVELOPMENT:** Do your organization's development plans include well-being goals?
2. **RECOGNITION:** Does your company share and celebrate well-being successes?
3. **COMMUNICATION:** Are your messages, especially from leaders and managers, consistent with a high-performing and net-thriving culture?
4. **INCENTIVES:** Do they inspire participation in activities that produce results?
5. **EVENTS:** Do they build awareness of net-thriving culture and change behaviors?
6. **RULES AND GUIDELINES:** Do they work for or against thriving?
7. **FACILITIES:** Is it easy to move around your office space, see outdoors, and collaborate?

In the WFH hybrid environment, how are organizations successfully expanding the corporate culture beyond the office walls to include and engage remote employees? Companies with extraordinary cultures and





off-the-charts employee engagement do not accomplish this by accident.

Instead, these organizations invest in programs that actively collect and listen to the voice of the employee and design employee journeys that ensure satisfaction and happiness.

Many organizations use journey mapping to understand the customer experience, and it is also a great tool to enhance the employee experience.

[Microsoft](#) is one organization that uses mapping to reveal pain points and identify solutions specifically related to employee journeys. Applying these same approaches to the WFH hybrid environment is a critical component of success.



Instead of simply increasing the number of virtual one-on-ones, manager check-ins, and happy hours, companies like [Zappos](#) are extending in-office resources to remote employees to redesign the employee experience and emphasize well-being. For example:



- Leaders share tips and advice for timely issues, such as managing remote teams
- Family-friendly activities help employees make the most of time spent at home and focus on being mentally and physically healthy
- Wellness and learning challenges and webinars help workers cope with new realities

When designing the WFH remote employee experience, organizations should ensure that both in-office and remote employees are treated equally and have the same engagement opportunities, when possible. Planning meetings and events with remote workers in mind is a must.

Think about something as simple as the way meetings are held. For example, rather than gathering in-office workers in a conference room and having remote workers join onscreen, have everyone join the meeting remotely using their own laptops to offer the same experience to all. Ensuring remote workers feel included, comfortable speaking up, and able to contribute is important to their engagement level.

Looking for ways to shift to communication online (rather than in-person or blended) helps organizations avoid issues that may arise from remote workers being unaware of conversations or decisions that were made in-person. Prioritizing online communication is a simple step that can improve employee well-being in a WFH hybrid workspace.



## Conclusion

As the pandemic eases and operations stabilize, the WFH hybrid model will be a mainstay for the foreseeable future. Large and small companies alike have adopted this model to allow employees the flexibility they have become accustomed to while using office space for in-person collaboration and innovation. Designing the most effective version of this model for your organization requires increased attention and enhanced partnerships.

Focusing on technology enhancements that increase collaboration, stabilize connectivity, and reduce security risk is an important element of an effective program. In addition, concentrating on the critical aspects of employee well-being will also contribute to success.

Great companies strive to create employee experiences that drive happiness and peak performance while considering the remote employee experience. This extra planning and attention can ensure WFH hybrid model success and is less likely to leave remote employees feeling left out and disengaged. These efforts will also help protect your organization from the negative impacts of The Great Resignation, something most companies are working hard to combat.

The era of the WFH hybrid model is here. How is your organization ensuring success? 🤖

## Links:

- 1 <https://www.forbes.com/sites/edwardsegal/2022/02/20/predicting-how-when-or-if-the-great-resignation-will-end/?sh=4c34c8114bfc>
- 2 [https://www.pwc.com/us/remotework?WT.mc\\_id=CT10-PL102-DM2-TR1-LS3-ND30-PR4-CN\\_ViewpointHighlights-](https://www.pwc.com/us/remotework?WT.mc_id=CT10-PL102-DM2-TR1-LS3-ND30-PR4-CN_ViewpointHighlights-)
- 3 <https://www.gallup.com/workplace/215924/well-being.aspx>



# The New Best Practices for eCommerce Customer Service

**The importance of people and relationships in the future of customer service.**

**+ Gladly** *by Joseph Ansanelli, CEO and Co-Founder, Gladly*

At this point, a tech company saying, “the world has changed,” is predictable. But, of course, the world has changed. Not in a monolithic, overnight, all-at-once way that has become cliché, but in a thousand small ways that have grown from decades-long trends that tangle and weave and grow and ebb.

Customers have changed: transformed over many years by changing demographics, technology, and access. And their [expectations for great customer service](#)<sup>1</sup> have changed as

well, replacing the exuberance of technology and automation that was the dominant trend through the nineties, aughts, and teens with a renewed focus on the person and the personal.

The future of customer service is not one of tickets and cases, but of people and relationships. This isn't a small change in the technologies brands deploy, and it's not a problem of just adding more customer service agents. Building meaningful relationships with your customers is going to require a fundamental strategic shift in how we conceptualize customer service from bottom to top. The future of customer service is about



empowering agents to become heroes by giving them the tools, training, and support to truly center the customer.

So, what are the best practices brands need to put in place now to really build customer-centric service experiences? How have brands like Crate&Barrel, Warby Parker, Allbirds, and REI reinvented their customer service to drive loyalty and sales while improving efficiency, scalability, and sustaining growth? Here are five best practices you can put into place today to meet modern customer expectations and win the future of eCommerce.

### Service Is About People

No one has ever wanted to be just a ticket or a case number. Customer service, great customer service, is about building relationships and getting radically personal. Doing so, however, isn't just a matter of building a better ticket management platform. It requires a complete rethinking of how we handle customer service interactions from the bottom up, replacing tickets with people and cases with conversations.

### Measure What Matters

As we've moved more and more toward a data-driven approach to business, some of that has gotten lost. Letting numbers guide your business decisions is absolutely the right move, but if the numbers doing the guiding are the wrong numbers, you may end up in a completely different place than you wanted to.

Too much legacy customer service wisdom is built around cold, impersonal objectives while ignoring the quality of conversations your agents are having with customers. These traditional approaches create the opposite of customer-centered service. They evaluate customer service success based on business goals and financials, while ignoring that the only party qualified to judge the success of a customer service interaction is the customer.

When deciding on metrics to judge your service by, focus on the three top pillars of customer service: the customer, the associate, and the brand. That's [what Crate&Barrel did<sup>2</sup>](#), and it found that the financial metrics took care of themselves as long as you had service covered.



### Know Your Customer

Tumi didn't become the best-selling business luggage brand just because they made the best roller case (though they do!). They did it by understanding who their customers were, what their pain points were, and [how they could best be there for travelers in need<sup>3</sup>](#). Their dedication to knowing who their customers were, as a block but also as individuals, helped them build their reputation, and their reputation helped them build their business.



For the future of eCommerce customer service, knowing your customers means more than just having market data on their needs. It means that no matter who they talk to, in store or online, knows them by name and can immediately see their history with your brand without having to introduce the friction of asking. Customer service centers need to have the tools in place to make sure that the support hero in Des Moines should be able to provide the same level of service as the sales manager in the flagship store on 5th Ave.

### Prioritize, But Don't Show Favoritism

Every customer deserves the best customer service. However, the reality of time and support hero constraints often means that your brand will need to triage service requests – there are only so many requests any one hero can handle at a time, and only so many hours in a day for them to handle them.

Brands need to be able to quickly identify which support requests come from customers stalled in the purchasing process, or their best customers so they can match them to the right agents and do so quickly. But they also have to be careful to make sure that they aren't perceived as playing favorites. This is a delicate dance; getting it right requires investment in tools and training for identifying these VIP customers, and for making the process frictionless enough that no one walks away feeling like they got pushed to the back of the line.

### Service Is About Being There

When customers have a problem, they don't spend time thinking about what channels to contact customer service on. People don't think about channels. They use whatever feels natural in that moment and in that context. Too many customer service platforms and professionals still focus on adding channels for the sake of being "omnichannel."

Good customer service isn't omnichannel – it's channel-independent, and meets customers on their terms, wherever they are in one seamless conversation that can continue regardless of which medium the customer wants to use at that moment. Great customer service takes it a step further and allows conversations to continue seamlessly as customers move from device to device or across channels to fit the conversation they need to have and their situation in that moment – from chat to phone to text to email back to phone and so on. And all of this becomes part of that customer's single, lifelong conversation with a brand that a support hero needs easy access to the next time that customer reaches out.

Brands need to ensure that their customer service operations are likewise set up to be focused on conversations and people, not channels. Nothing will frustrate customers more than having to explain their problem again and again whenever they move from one channel to another. They also need to give support heroes the tools to see which channels customers prefer so they know where to reach them when there's an update. Deckers, the parent of footwear favorites Ugg, Hoka One One, Teva, and others, saw [service levels improve by 40%](#)<sup>4</sup> after switching to Gladly largely driven to being able to connect customer conversations across channels and reach them on their preferred medium.



But even though customers want conversations to be channel-independent, brands still need to consider their channel mix to ensure your customers can reach your agents in their preferred manner. It's not enough to have live chat, phone, and email anymore. Instead, the conversations need to be about SMS as a baseline, and then social messaging, depending on customer profile.

For brands with a large, technology-heavy customer base, that might be Slack and Discord and Telegram. For more general consumer companies, it could be Instagram, Twitter, and Whatsapp. And the big curveball is that this ideal channel mix can be radically different across geographies and buyer personas, making it critical that you can provide a consistent level of personal service, no matter how customers reach out. It's not enough to just be on all the popular channels – your customer service heroes need to be everywhere, all at once, and able to connect conversations, no matter where they happened.

## Help Your Customers Help Themselves

As the old saying goes, "Give a man a fish, and you feed him for a day. Teach a man to fish, and you feed him for a lifetime." A lot of the most common questions customers contact support for are not questions that need direct agent intervention on.

These queries – "When is my order shipping?", "What is your return policy, and how can I start the return or exchange process?", "How do I care for my purchase?" – are important, but they can also be answered just as effectively without any agent involvement, at all. In fact, many can be answered more effectively without human intervention, freeing your agents to become the most effective support heroes they can be.

In providing quality self-service solutions for common customer challenges, you're achieving two critical objectives: demonstrating

to customers that you value their time, and freeing up your agents' time to deal with higher-complexity and higher-value customers. The former allows you to return some time to customers and save them frustration, building up your brand equity in the process. The latter allows your agents to become heroes as they build deeper personal relationships with your customers and gain the breathing room to start turning service into a revenue driver with upsells and cross-sells. Deckers was able to [increase self-service by 60%](#)<sup>5</sup> and customer search success by a full 90% after redesigning their content-driven self-service area and, in turn, dramatically improved customer and agent satisfaction.

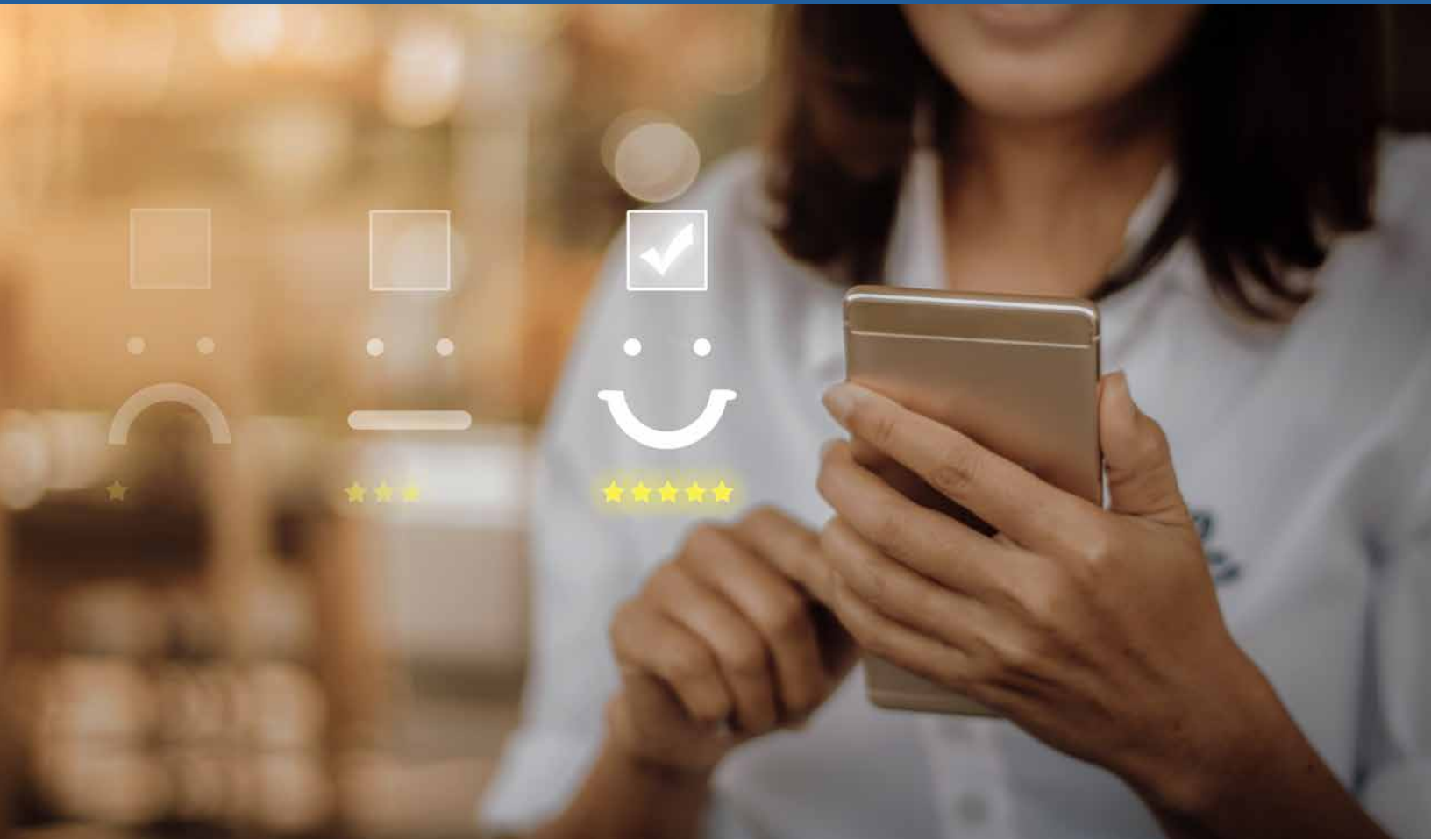
## Drive Revenue Through Service

The most interesting best practice driving the future of eCommerce customer service is borrowed from the past – turning service into an opportunity to drive revenue. Just like in the heyday of large department stores, modern customer service needs to be part support and part sales. Companies need to be as adept at recommending a matching outfit or a complementary desk lamp as they are in rectifying mishaps and handling sizing questions.

As we continue the fundamental shift to digital-first and digital-native, maintaining the traditional divide between "sales" personnel and "service" personnel becomes not just untenable, but actively harmful to growth. When your storefront is a website and there are no salespeople to ask questions, service has an amazing opportunity to fill that role. And by transforming a former cost-center into a profit driver, brands on the cutting edge of service have a tremendous upside that positions them for faster, higher growth.

However, it's not enough to just issue a mandate to sell and conversion quotas to service center managers. Agents need infrastructure and air cover to be an effective sales force. That means investing in self-serve options to divert low-





value/low-touch service queries, productivity and automation tools for next-level queries to allow for higher concurrency, and a more inclusive and fluid platform overall to allow agents to see a customer's full history and make intelligent recommendations that win sales without feeling pushy.

Most important, you have to change the way you look at service center effectiveness and the things you measure that by. Crate&Barrel has a fantastic story about [driving revenue through service](#)<sup>6</sup>, but getting there meant rethinking all of the fundamentals of service center operations, from ditching handle time as a performance metric to giving service heroes plenty of latitude in how they contact customers looking for service and what they talk about. In exchange, however, they found that the costs of longer conversations were more than offset by

new sales and increased customer satisfaction.

### Use The Right Tools

The first step of any renovation is putting together an end goal and a plan to get there. The second step is to collect the right tools. You can build a house entirely with manual hand-tools, of course, and people have for thousands of years. It's going to go a lot faster with some power tools built for the job, though.

Rethinking customer service from the ground up is no different. It's not possible to make a ticket-oriented system function in a really truly customer-centric way. You can maybe string together support cases into a cohesive conversation. You might even be able to cobble together order numbers and multi-channel touches into one single interface. It's not going to work nearly as well as a platform intentionally

designed around people first. We may be a little bit biased here, because our platform was built differently from the start, but the simple truth is that trying to fit a new paradigm onto old platforms is challenging at the best of times. With the speed at which commerce is changing, these are far from the best of times, and brands have a relatively small window to turn customer service into a real differentiator before it becomes table stakes.

Finding the right platforms and tools to enable change to happen quickly and smoothly is imperative, since the right partner can make all the difference in change management operations – from training to workflows to reporting and business results. The way people buy, on- and offline, is changing faster today than at any time in the last 50 years; trying to navigate those changes with legacy platforms is an unnecessary hurdle that can be eliminated much easier than it can be overcome.

## Looking To The Future

The world has changed. The world is still changing. Almost exactly two years ago, we all saw just how suddenly everything can turn completely different. As we look into the future, it's unlikely that the pace of this change is going to let up. In fact, it's probably a safe bet that it'll accelerate. Black swan events will become more common, consumer preference will shift on a dime, and competition from emerging economies will shift markets in ways we can't predict.

Established brands may be able to maintain course and rely on their heritage and traditions to keep them afloat, but heritage only goes so far, and floating isn't the same thing as flourishing. These best practices will help you navigate some of the uncertainty happening right now. More important, they'll help you position your brand to be more agile, more responsive, and more customer-focused in the future, allowing you to move and grow, no matter what comes next. And for up-and-

coming brands, focusing on these customer service best practices will help you define your brand in the context of service, and begin the process of building a strong heritage.



**Joseph Ansanelli**  
CEO and Co-Founder  
Gladly

Joseph has spent most of his career as an entrepreneur, building and investing in companies that don't settle for the status quo. He is currently a partner at Greylock and the CEO and co-founder of Gladly, a company that is reinventing customer service by focusing on people first. The Gladly customer service platform helps some of the world's top brands, like Crate & Barrel, Warby Parker, REI, and Tory Burch, deliver radically personal customer experiences.

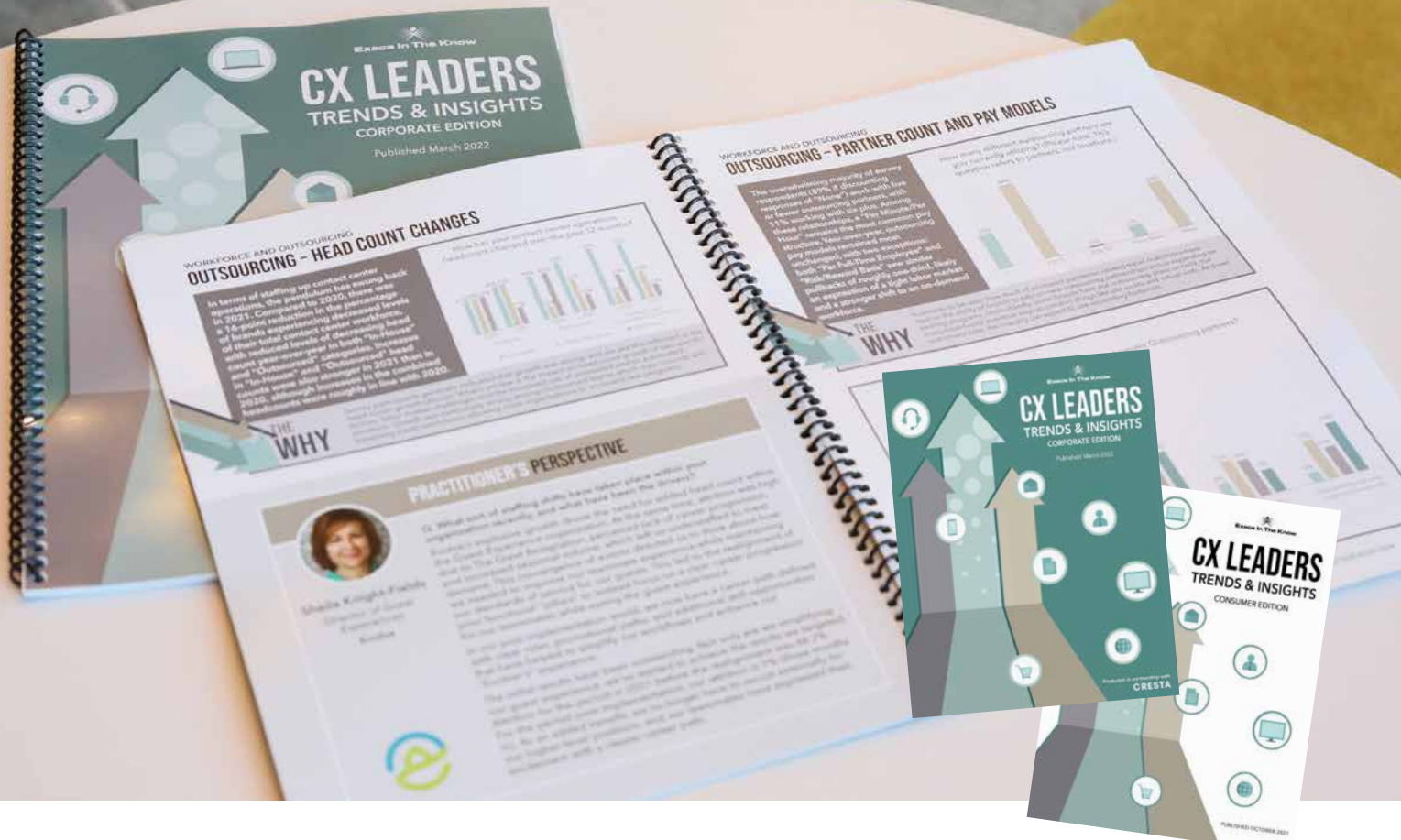


For more information, visit:

**[Gladly.com](https://www.gladly.com)**

### Links:

- 1 <https://www.gladly.com/blog/customer-expectations-for-a-modern-online-shopping-experience/>
- 2 <https://www.gladly.com/podcast/crate-and-barrel/>
- 3 <https://www.gladly.com/podcast/tumi/>
- 4 <https://www.gladly.com/customers/deckers/>
- 5 <https://www.gladly.com/customers/deckers/>
- 6 <https://www.gladly.com/podcast/crate-and-barrel/>



# CX Research: Filling in the Gaps

**Using customer experience (CX) research to better understand consumer behavior, opinion, and preferences.**

*by Execs In The Know*

In October 2021, Execs In The Know released an entirely new and comprehensive research series, [CX Leaders Trends & Insights](#). Unique to this research is its publication in two distinct volumes: a Consumer Edition and a Corporate Edition. While each provides insights into the experiences, opinions, and perspectives of each volume's target cohort, the Corporate Edition contains a special section dedicated to identifying alignments and disconnects between the two groups (i.e., consumers and the CX leaders who serve them).

In this article, we'll examine some of the more profound disconnects between the two volumes of research, examining where consumer and CX leader opinions and perspectives diverge, as well as highlighting a couple points of alignment.

The fact of the matter is, CX leaders can only create effective change within their organizations if armed with a deeper understanding of the consumers they serve. More specifically, CX leaders should seek to understand their specific customers, as well as the current experience provided by their brand. While CX research (including the likes of the CX Leaders Trends & Insights series) might not always tell the complete story, it can provide some broad-stroke clues about where consumers are at in their thinking, where they'll be next, and what they expect as they make the transition.

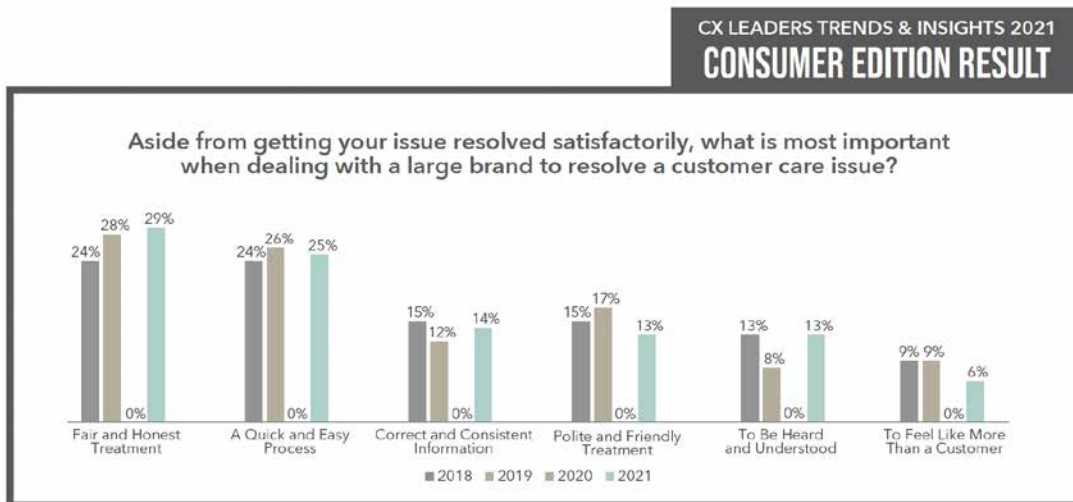
With that, let's have a look at what the data is saying, and start to fill in some of the gaps, starting with where consumer and corporate perspective diverge.



## The Disconnects

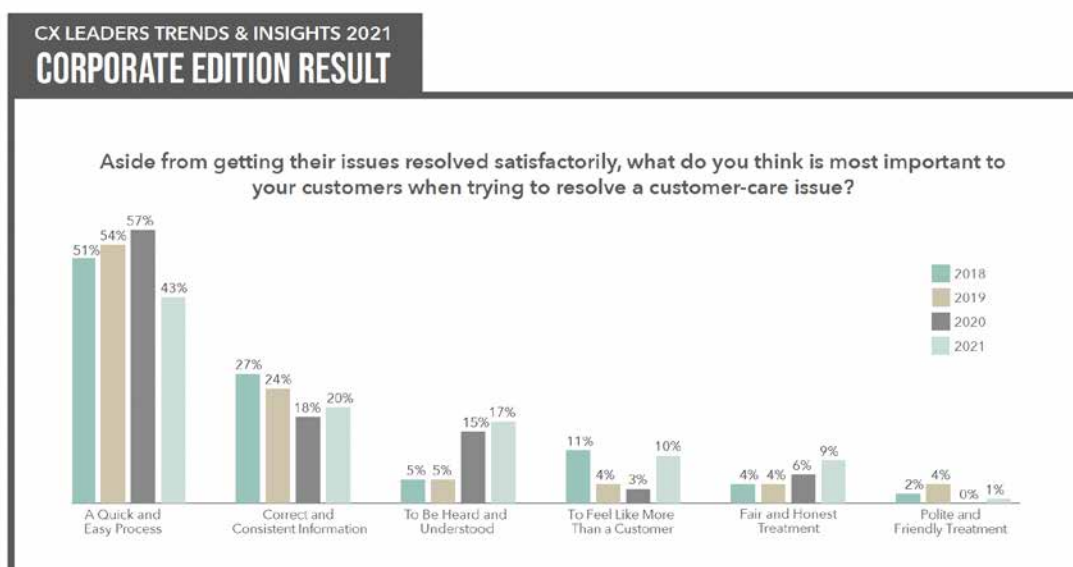
### 1) Consumers Want Fair and Honest Treatment Above All Else

Let's start with what's most important to consumers when dealing with large brands to resolve a customer care issue.



What's most striking about this consumer-based result is the consistency in three years' worth of surveying data. Not only do the responses of "Fair and Honest Treatment" and "A Quick and Easy Process" consistently top the list (and by a rather wide margin), but the former maintains a steady, albeit slight, edge each time. Plainly said, consumers want their customer care dealings with brands to be fair, quick, and easy. Everything else related to the experience is but a second-tier consideration.

So, how does this compare with the perspectives of CX leaders when they are asked to speculate on what's most important to their customers?



Clearly, there is a noteworthy disconnect. While CX leaders correctly estimate the importance of “A Quick and Easy Process,” they entirely miss the importance of providing a specifically “Fair and Honest Treatment” to their customers. But what does “Fair and Honest Treatment” mean exactly, and how can brands ensure they are delivering on this customer expectation?

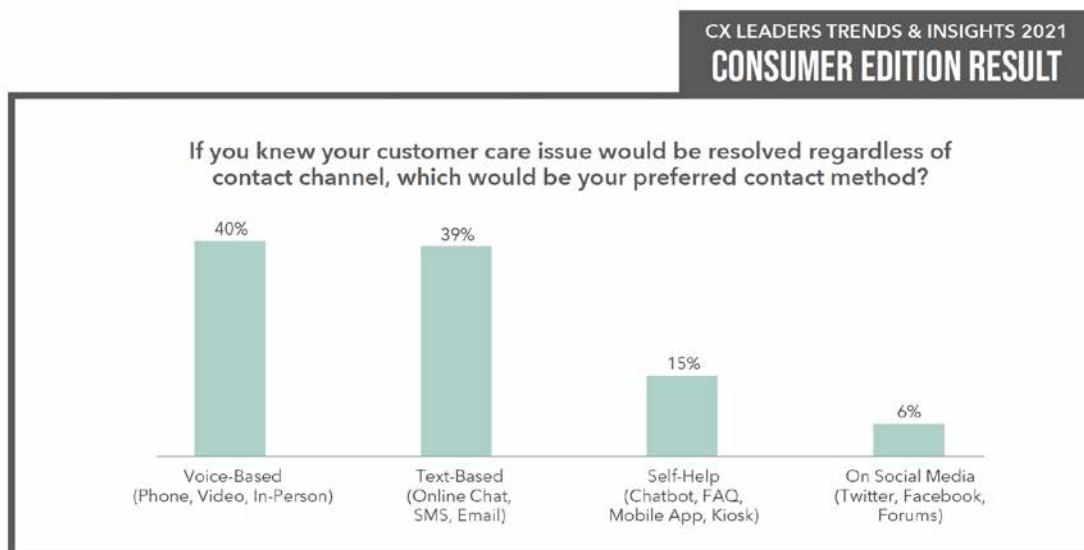
Like so much related to CX, almost every valuable, actionable insight starts with data. If brands want to understand what “fair and honest” treatment means to their customers, they should start with their Voice of the Customer (VoC) data, including surveys, contact-based voice and text analytics, and Quality Assurance program data. Frontline staff can also be a valuable source for insights into what might feel broken or unfair to customers.

Begin with examining company policies and procedures, and always approach things from the customer’s perspective. When specific issues are identified, quantify the current impact, calculate the cost of changing course, and measure the delta between the two. It’s often the case that CX leaders will quickly discover the cost of doing nothing is far greater than working to remedy the situation. It’s also true that company policies can be quite flexible once leadership and other areas of the business are brought up to speed about the impact of a particular policy and its impact on the overall customer experience.

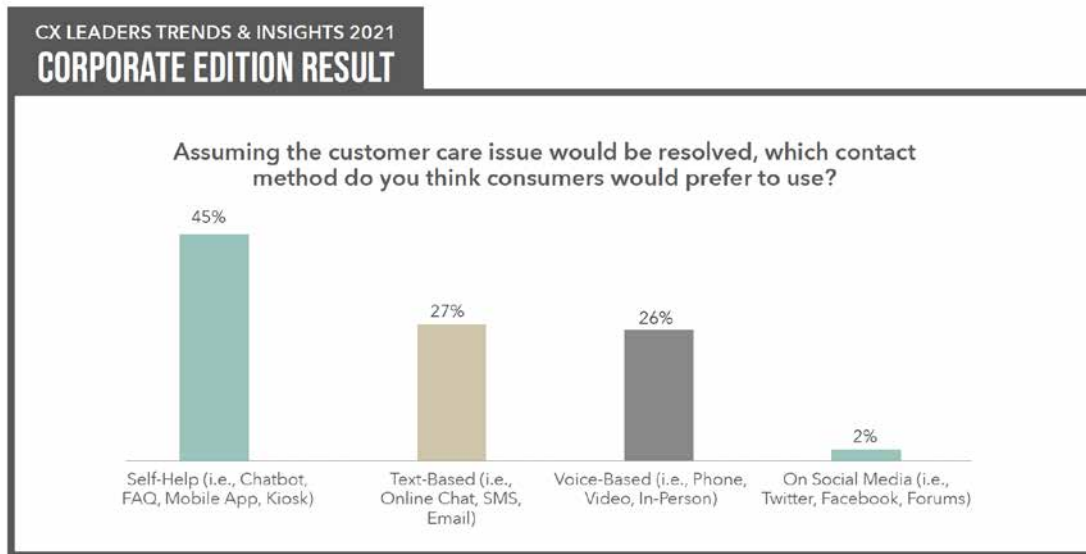
## 2) Consumers Still Want Help from Other People

Self-help solutions have come a long, long way since the first commercial use of an Interactive Voice Response (IVR) system in the early 1970s. Furthermore, the past decade has seen an explosion of innovation, including more advanced mobile applications, artificial intelligence (AI)-powered chatbots, user-friendly knowledge bases, and other “smart” solutions. Moreover, the onset of the global pandemic in 2020 has served to only accelerate these developments, resulting in a slew of companies bootstrapping and fast-tracking self-help solution projects.

But is this what consumers really want? Have a look:



So, the answer is “Yes,” to a very limited degree. In fact, only 15% of consumers would prefer a self-help solution above either the Voice- or Text-Based help of a person, all other things being equal. But where do CX leaders think consumers are in terms of their preference for self-help versus Voice- or Text-Based help from a human?



Almost half of CX leaders think their customers would prefer to use a self-help solution, a three-fold disconnect from the consumer edition results. Perhaps this outcome isn't too surprising given the fact that CX leaders have insights into metrics like contact volume flow, deflection and resolution rates, and cost-per-contact, all helping to shape a story. Consumers, on the other hand, only have their most recent experience using a self-help solution. Given the above disconnect, that's exactly where CX leaders should be focusing their attention when it comes to self-help solutions: the experience. Are the self-help solutions provided by a brand easily accessible, simple to use and, above all else, effective at resolving a range of issues?

Even if a brand checks all the boxes on the aforementioned attributes, it's also important to understand that adoption takes time. But that's not the only headwind. A single bad experience has a far greater impact than a single good experience, and many consumers are formulating their opinions on self-help solutions based not on their experiences with the solution of a single brand, but based on their experiences with the self-help solutions of all brands. In other words, consumer opinions are, in large part, being shaped by the lowest common denominator – their least pleasant experience with a self-help solution, regardless of industry or brand. To combat these perceptions, brands must make sure their self-help solutions are optimized to meet the expectations of their customers, and the proper amount of resources need to be devoted to setting realistic expectations by educating customers on things like self-help solution use cases and limitations. If brands can evolve their self-help solutions to be easy to use, and are effective at solving for a wide range of issues, customers will come around in terms of their preferences.



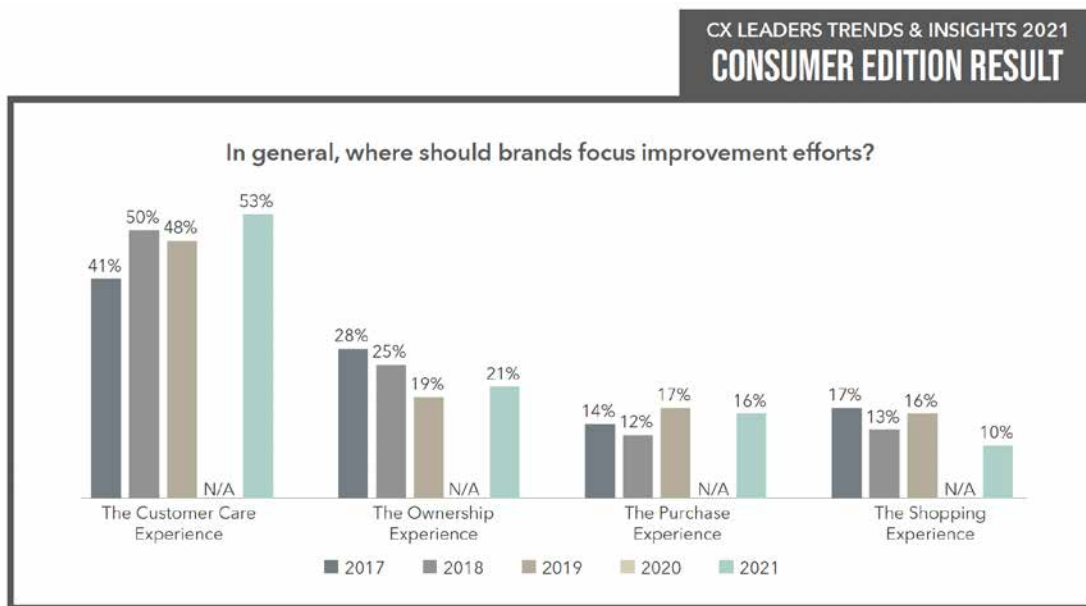
These are just two of the disconnects highlighted in the Consumer Comparison section of the CX Leaders Trends & Insights: 2021 Corporate Edition report. But disconnects weren't the only interesting dynamics to have emerged. There were also several points of alignment. Here are a couple of the more harmonious results between the perspectives of consumers and CX leaders.

## Points of Alignment

### 1) Above All Else, Brands Should Focus on the Customer Care Experience

Time, attention, and money are all finite resources. While the priorities of an organization may be many, the simple fact of the matter is there can only be so many areas of focus. So, where should brands direct their limited resources in improving a particular aspect (or experience) inclusive of the overall customer experience?

Let's see what consumers think:

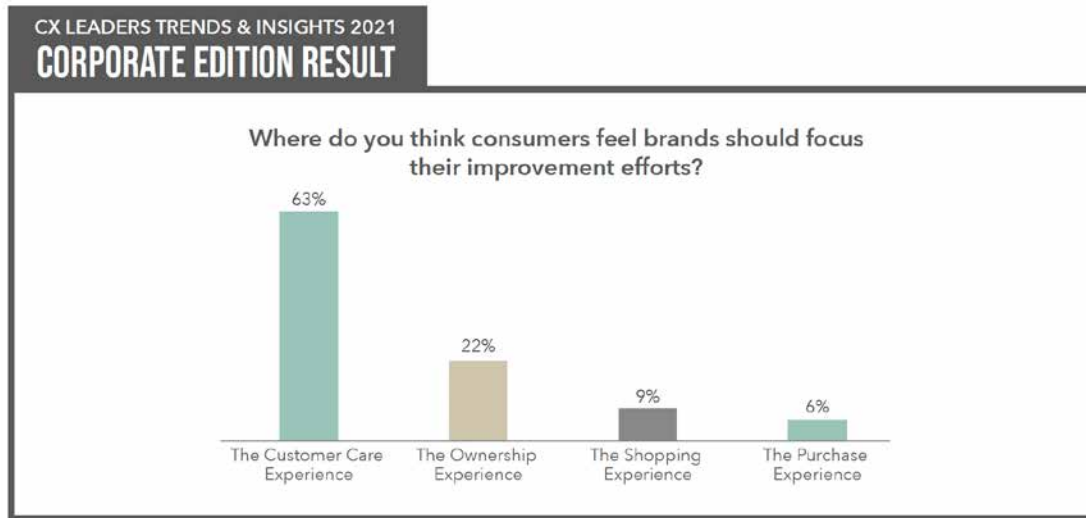


By and large, consumers point to the Customer Care Experience as the place where brands should focus their limited improvement efforts. What's even more telling is that this has consistently been the case since the question was first asked of consumers in 2017.

Granted, Customer Care is typically a more complex and nuanced engagement than either a Purchase or Shopping Experience, let alone the Ownership Experience (the experience of simply owning a product or utilizing a service). It's probably also true that there is not as much leeway for brands to differentiate when it comes to the Purchase and/or Shopping Experience. It is typically the case that innovations are quickly and widely adopted. In fact, the

Shopping and Purchase Experience has, in many ways, been standardized and commoditized. Nonetheless, consumers are certain in their opinion of where brands should focus.

But where do CX leaders think consumers stand on this topic?



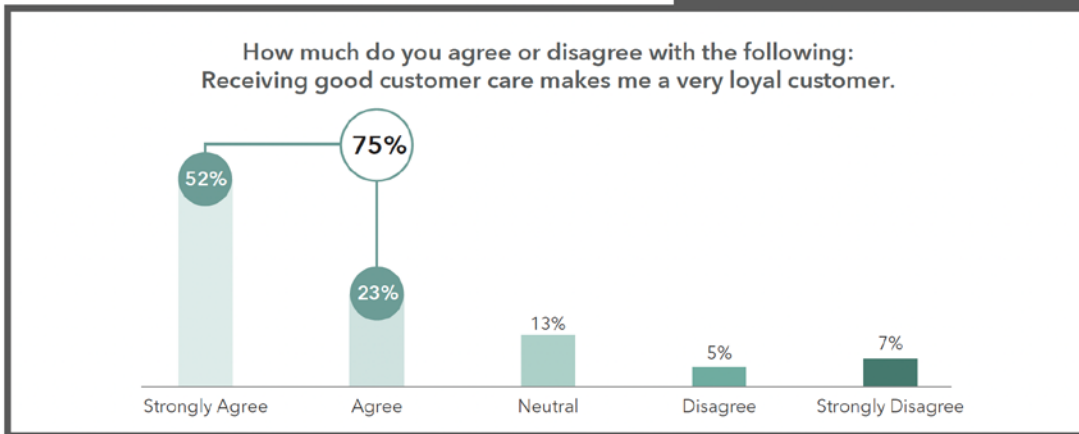
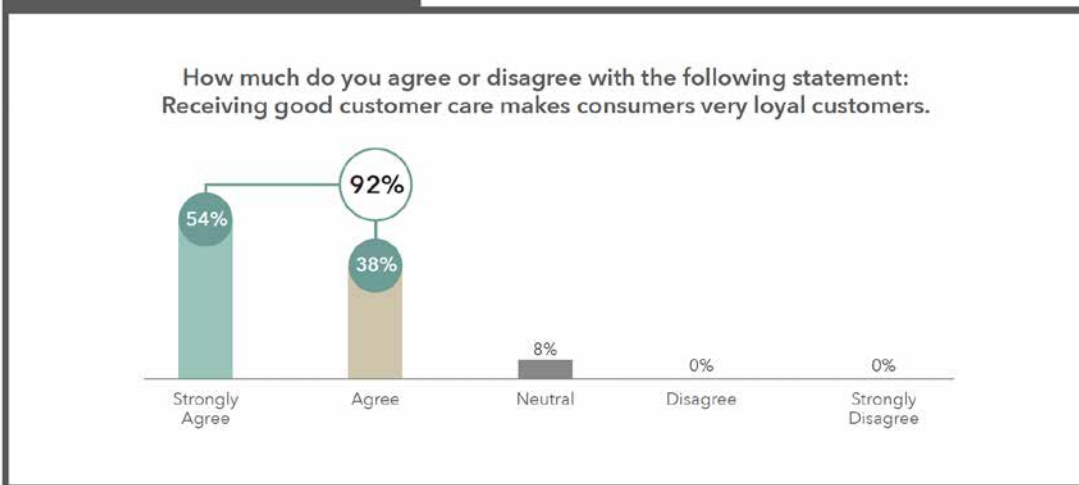
Although this question was first asked of CX leaders in 2021 (so there is only a single point of data), corporate respondents were quite accurate in their estimation of consumer opinion. Yes, the fact that it is CX leaders answering this question (as opposed to marketing or product leaders) is certainly a factor, which may explain the slight overestimation. That said, who better to understand the business impacts of investing time, attention, and resources into improving the Customer Care Experience?

While there is no shortage of data connecting the dots between excellent customer care (as expressed by high CSAT and NPS scores) with things like brand loyalty and repeat business, the consumer's stated perspective also holds value. In other words, if leadership needs more convincing when it comes to investing in customer care, it's reassuring to have data that points back to the consumer's desire for an improved Customer Care Experience, above all else.

## 2) Receiving Good Customer Care Does, In Fact, Lead to Loyal Customers

As demonstrated in the previous Point of Alignment, the Customer Care Experience matters a great deal to consumers. While the survey results don't explicitly point to customer loyalty as a byproduct of receiving great customer care, it's certainly implied. Luckily, both consumers and CX leaders were asked a much more poignant question on the matter of loyalty.

Here's how they responded, respectively:

CX LEADERS TRENDS & INSIGHTS 2021  
CONSUMER EDITION RESULTCX LEADERS TRENDS & INSIGHTS 2021  
CORPORATE EDITION RESULT

It is important to distinguish the fact that in this pairing, unlike the others, CX leaders weren't asked to estimate the thoughts and opinions of consumers. They were, in fact, asked to express their own opinion on the matter. This detail aside, it's clear that both consumers and CX leaders are in close alignment about the importance of the Customer Care Experience in determining customer loyalty. In fact, more than half of all consumers and CX leaders "Strongly Agree" that good customer care results in very loyal customers.

Though it should be no surprise that 0% of CX leaders would either "Strongly Disagree" or "Disagree" with the statement, there was remarkably low disagreement among consumers as well. This should serve to provide organizations with plenty of kindling to fuel the notion that investing in a better customer care experience is a smart long-term business strategy. Why? Simply put, generating higher rates of loyalty pays dividends, and in multiple ways.




First, it's far more profitable to retain existing customers versus recruiting new ones. In fact, some research puts the cost of attracting a new customer at as much as five times the cost of retaining an existing customer.

Second, given the competitive nature of current markets and razor-thin margins across categories, customer loyalty is simply rarer and more difficult to earn than in decades past. Customers can no longer be forever won by a single aspect of the overall customer experience, be it price, product quality, or quality of care. All aspects of the customer experience, from shopping to buying to owning, must be polished and meet constantly evolving customer expectations, often shaped from experiences that cut across verticals. For this reason, the stakes are much higher today.

Consumers are now in the business of benchmarking every customer experience against the best customer experiences they've had. For instance, consumers might ask themselves, "If an airline can create an easy-to-use app where I can book my flight and get in touch with customer care, why can't my favorite retailer do the same?" In this way, brands are no longer competing within their segment, but are instead competing against providers of the best customer experience across all verticals. Without understanding this and making the proper investments to compete within this reality, brands might be putting themselves at an immense competitive disadvantage. Clearly, CX leaders already understand this and, undoubtedly, they are doing their part to help the wider organization catch on. Hopefully, this and other CX-related research can help smooth out that effort.

## Want More CX Research?

Although this article focuses on some of the more interesting comparatives between the 2021 Consumer and Corporate Editions of the CX Leaders Trends & Insights series, in truth, this article only scratches the surface. Together, the CX Leaders Trends & Insights: 2021 Consumer and Corporate Edition reports pack nearly 140 pages of survey results, analysis, and exclusive Practitioner Perspectives.

To download digital copies of the research discussed in this article, as well as gain access to other CX-related research, please visit the [Execs In The Know CX Research Library](#). 



## WE INVITE YOU TO EXPLORE OUR RESEARCH LIBRARY

Within the Execs In The Know community, a wealth of CX knowledge exists as a part of our CX Research library. As the appetite for industry research and data continues to grow, we will be evolving and taking our research to new levels.

GET RESEARCH DELIVERED TO YOUR INBOX

# Navigating Procurement and BPO Amid Unprecedented Challenges

KIA Online Community Member Spotlight:  
BETH PENDLETON, PMP

by Execs In The Know



## Humana

*A longtime Humana team member, Beth Pendleton has been focused on supporting procurement initiatives at the Louisville, KY-based health insurer since 2018.*

*Beth oversees a team of Outsourcing Category Managers operating within the business process outsourcing (BPO) and information technology (IT) spaces. Beth knows the value of relationships and uses this understanding to drive value across the enterprise.*

*In early March 2022, we had a chance to ask Beth about her area of expertise – procurement – and get an insider's look at navigating a global pandemic, "The Great Resignation," and some of the other challenges faced by CX leaders over the past couple of years.*

*Beth is the Associate Director of Procurement at Humana, deploying her vision of driving value through relationships across the wider organization. Beth has been with Humana since 2007.*

**EXECS IN THE KNOW (EITK):** Beth, you have been specializing in the procurement space for at least the last ten years of your career. Can you talk about how and why you landed in procurement as your area of expertise?

**BETH PENDLETON:** I have always been energized by roles where I have the opportunity to make a difference. Prior to joining procurement, my role was centered on effective communication and process transformation. When the Procurement role came up, one of my senior leaders shared the role and thought it would be a great fit. He was certainly my saving grace, because that job description spoke to all the things I was passionate about: developing relationships, creating value, challenging the status quo, negotiating, leading others, and growing my knowledge of the intricacies of the enterprise. Every day, I learn something new in this role and every day, I appreciate the opportunity to be a part of the change.

**EITK:** You have been with Humana for more than 15 years. Many readers might be familiar with the name, but as a longtime insider, can you share a little bit about the culture of the company and its philosophy as it applies to customer experience (CX)?

**BETH:** Humana is committed to helping our millions of medical and specialty members achieve their best health. Our successful history



in care delivery and health plan administration is helping us create a new kind of integrated care with the power to improve health and well-being and lower costs. Our efforts are leading to a better quality of life for people with Medicare, families, individuals, military service personnel, and communities at large.

To accomplish all this, we support physicians and other health care professionals as they work to deliver the right care in the right place for their patients, our members. Our range of clinical capabilities, resources, tools, and services (such as in-home care, behavioral health, pharmacy services, data analytics, and wellness solutions) combine to produce a simplified experience that makes health care easier to navigate and more effective.

**EITK: The world has changed a lot in the past two years, particularly in how companies procure talent and work with outsourcers. While there have been challenges, there have**

**also been plenty of big wins and learnings. Can you talk about some of your biggest wins and learnings from the past 24 months?**

**BETH:** You are absolutely correct. The last two years have been a whirlwind of challenges. Our success actually began before the pandemic. The team spent most of 2019 building strong and robust relationships with our business partners and suppliers. When the pandemic hit, both our business partners and suppliers knew who to go to for support. Without a doubt, our biggest win was our swift responsiveness. When I think about how quickly my team responded, I am in awe of how incredible they were.

At the time, we had several suppliers taking calls for Humana. While we did have a small population working from home, we needed to expand that footprint quickly. For my team, this meant expedited renegotiation of contract terms to protect Humana, but to also allow suppliers to retain top talent.



Two years later, we now face what has been called, “The Great Resignation,” which has driven us to focus on the current market. We’ve strengthened our knowledge and become experts of sorts on market wages, performance-based incentives, service levels, the need for increased cyber security, location strategy, and more effective contract terms.

As I said before, every day in procurement is an opportunity to learn.

**EITK: In recent outsourcing-related surveying by Execs In The Know, many leaders indicated an oncoming shift toward nearshore resources. Are nearshore resources an area of focus for Humana? And if so, why? What advantages does nearshore offer?**

**BETH:** We support contracting for over 41M member and provider calls across multiple segments at Humana, and the footprint is both on- and nearshore. The labor market is very challenging right now, and retaining top talent comes at a premium. We conducted in-depth market research to better understand our nearshore options, and have made strategic procurement decisions that have allowed us to find top talent in both bilingual- and English-proficient agents.

**EITK: The employee experience, engagement, and well-being are all crucial to achieving success in the CX. What are some of the things you and your team do to make sure employees are plugged in and turned on, both internally and among outsourced teams?**

**BETH:** As a leader, it’s my job to make sure the people on my team feel heard, valued, and appreciated. They are all different, with unique qualities that make us better as a whole. We celebrate special events, have team challenges, and recognize everyone’s accomplishments. Where I feel we collaborate best is in our

team meetings. There, we share new things we’ve learned, discuss current market events and trends, bounce ideas off each other, and chat about life outside of work. It brings a cohesiveness, creating an environment where we are all better at what we do because of each other.

**EITK: One of the areas that has garnered a lot of attention recently is contracting best practices. Companies are looking for ways to innovate and get greater value from their partnerships. What are two or three best practices you can share in this area?**

**BETH:** I feel the single most important thing we can do in procurement is understand our business partners. We need to understand what they are solving for, what does success look like to them, and what are their current pain points. This level of understanding fosters their trust in us, helping us better collaborate on solutions.

We have also made a concerted effort to review our contracts and make changes to match market trends. Our contracts have really



evolved and strengthened over the past few years. Where applicable, we've pivoted to tiered transactional and/or productive hour rates. We've enhanced service levels to include incentives and penalties, included automation, and more gain sharing opportunities. We have also strengthened our infrastructure and security requirements.

Lastly, we stay current on market trends and performance. My team consistently works to stay current and share out that information. We attend seminars, meet with new suppliers, research market intelligence, build category strategies, and connect with our business partners on a regular basis. We recently started a newsletter as a platform for sharing what we learned, and hope it brings value to our stakeholders.

**EITK: When you're not busy developing and strengthening strategic relationships for Humana, what are some of your other biggest interests and passions?**

**BETH:** My passion is spending as much time as I can with my family. I have a husband, three children, and the most perfect grands: Leighton (4), Everett (1), and Cooper (1 month). As a mom of three grown, married children with busy lives, time is precious, so I soak up every second I get. I also love to read and am an avid quilter. My husband is retiring



this year, so I hope to add "traveler" to the list soon.

**EITK: You have been an active member of the Know It All (KIA) community since joining in the fall of 2020. What value do you get from your interactions on KIA, and how would you describe the value of both the online community, as well as the larger Execs In The Know community?**

**BETH:** The KIA community has been phenomenal. I live and breathe the healthcare industry. The diversity of the KIA community provides unique and valuable perspectives. I also appreciate the coffee chats and round table discussions where relevant topics and issues are discussed. Lastly, the online community has been immensely helpful when I have questions, want to bounce ideas off someone, better understand trends, or just seek general information. I am very thankful to this community and the support it brings. Thank you, Execs In The Know! 🙌

**Thank you to Beth Pendleton, PMP, Associate Director of Procurement at Humana, for her leadership, participation, and insight. To connect with Beth, 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 consumer-facing brands. Come learn, share, network, and engage to innovate. [LEARN MORE](https://community.execsintheknow.com/about-kia)\***

\*<https://community.execsintheknow.com/about-kia>.



# The Cloud is Calling

## Is Your Contact Center Ready to Answer?

**CYARA**  by Linda Chen, Chief  
Marketing Officer, Cyara

The brick-and-mortar contact center will soon be a thing of the past.

Even before COVID-19, call center executives had seen the writing on the wall. Digital transformation was picking up steam, and the physical constraints of legacy models were making less sense by the year. In 2020, Gartner forecasted that 50% of contact centers would shift their operations to the cloud by 2022.\*

Now, just two years later, that looks like a forecast that will fall far short of reality. A global

pandemic has made remote work and digital customer engagement more than mere perks – they're now essential for doing business. For call centers, that means migrating to the cloud to offer Contact Center as a Service (CCaaS) technology will soon be par for the course.

Will your business be able to keep up with these changes? Let's take a closer look at what's happening, how the cloud can transform your business for the better, and what you can do to prepare your call center for [cloud migration](#)<sup>1</sup>.



## The Cloud Is Rolling In

It's hard to overstate the impact of digital transformation on contact centers around the globe. Originally, Gartner had already predicted a jump from 10% contact center cloud adoption in 2019 to 50% in 2022. That now seems like an easy target.

For starters, consider how broadly cloud adoption is affecting every business – and every aspect of business – beyond just call centers. According to survey data from McKinsey and Company, the average company expects to spend 80% of its IT-hosting budget on cloud technology by 2024. That's a big leap from the 45% initially planned in 2021 – another sign that the pandemic put this process into overdrive.<sup>†</sup>

### IT-HOSTING BUDGET EARMARKED FOR CLOUD TECHNOLOGY



SOURCE: McKinsey and Company

For contact centers specifically, AVANT reports that the CCaaS market will grow from its current global size of \$3 billion to \$10.5 billion by 2027. That growth isn't shocking when you consider that most IT decision-makers planned to start implementing CCaaS solutions by mid-2022, if they hadn't done so already.<sup>\*\*</sup>

For many service-oriented businesses, the contact center has become the inflection point for [digital transformation](#)<sup>2</sup>. As consumers shift toward expecting digital interactions that move seamlessly across channels from IVR to text messaging to online chat, the contact center is at the center of it. And cloud migration proves central to meeting these new CX expectations.

### CCaaS EXPECTED MARKET GROWTH



SOURCE: AVANT

## The Cloud Is Good for Your Business

Why is the cloud so critical for contact center transformation? To understand that, let's look at five key benefits it offers over legacy systems.

### 1. Flexibility

According to Forrester, 81% of contact center executives report that the cloud has made their business more flexible.<sup>††</sup> It's not difficult to see why.

Legacy contact center solutions, constrained as they are by brick-and-mortar locations and physical infrastructure, automatically limit your call center's capabilities. Without the cloud, you can't rely on a remote workforce, for instance. It's much harder to manage an inventory of phone numbers and keep customer journeys up to date when everything is geographically dispersed rather than centralized. The cloud brings everything together and allows you to adapt more easily to your business's changing needs.

### 2. Scalability

Migrating to the cloud also makes it much easier to scale your business up or down, as needed.

Retail businesses may see huge spikes in call volume during the holiday season. Health insurance companies must be prepared for far more calls during open enrollment than throughout the rest of the year. Having your contact center in the cloud means you can expand or contract your business by adding phone numbers, changing call routing, or expanding your remote workforce to meet these fluctuating demands.

When you can do all this without adding more brick-and-mortar locations or other physical infrastructure, you can grow your business without increasing capital and operating expenditures.

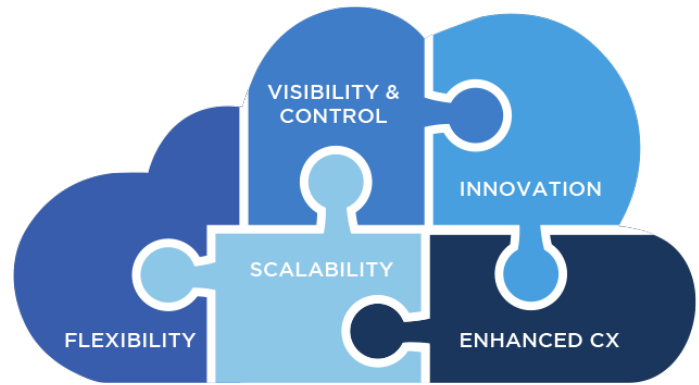
### 3. Visibility and Control

The cloud also offers call centers real-time insights and control. Testing and monitoring are easy to integrate throughout the software development cycle and in the live production environment. When it's all based in the cloud, you can see what's happening anytime, anywhere.

At Cyara, we've seen countless clients benefit from the way the cloud allows them to pull back the veil. One leading consumer electronics brand was particularly surprised by how easy it was to verify call quality and keep tabs on customer experience.

### 4. Innovation

Moving your contact center to the cloud opens up an array of new doors for your business. With the cloud, you gain access to more robust automated testing, AI-driven technology, live monitoring and more that you simply can't implement within a legacy system.



Essentially, cloud migration helps future-proof their technology infrastructure. Once you're in the cloud, it becomes that much easier to innovate and adapt.

## 5. Enhanced CX

Finally, a cloud-based contact center allows you to meet your top priority: delivering a better CX. This is where all the other benefits of CCaaS ultimately lead. When your contact center can adapt more quickly, scale more rapidly, and innovate more frequently, it all leads to a better product for the end-user. And, thanks to the real-time insights you can gain when testing and monitoring in the cloud, you can continuously improve your CX on the fly.

*We now have a clear visibility in real time of our contact centers — due to the fact that we are triggering voice calls every minute — and we verify the quality of the call integration that we have in the backend...right through to the agents. Then we ensure that everything is working as expected.*

**- An Agile Delivery Lead**  
at a leading consumer electronics brand

## Urgency Is No Substitute for Planning

Given the pressing need for cloud migration, it's understandable that many contact center executives feel ready to jump in with both feet. Rushing into a change like this is never a good idea, though.

Many executives grossly underestimate the complexity of the cloud migration process. The same leading consumer electronics brand we mentioned earlier was initially shocked by how much more extensive the process was than they had anticipated.

Cloud migration involves much more than simply moving your call infrastructure from one place to another. You're bringing together disparate legacy systems, migrating enormous amounts of data, and re-mapping your entire customer journey. Even more daunting is the task of integrating departments that may be operating within isolated silos.

This process is often further complicated by missing data, incomplete documentation, clunky existing manual testing processes, and simple human error. All these unanticipated demands can easily extend your transition timeline by nine months or even a year. As McKinsey reports, companies end up overspending on their cloud migration projects by 14% on average, and many end up reducing the scope of their migration project as a result.<sup>†</sup>

For contact centers, the costs of a clunky or poor migration go far beyond any budgetary overspend. In this day and age, every customer has a microscope and a megaphone. When you roll out an incomplete CX solution, they're ready to scrutinize it and share your failures on social media. It could do lasting damage to your reputation.

## Charting Your Course to the Cloud

Where does this leave contact center executives who are eager to migrate to the cloud but want to do it with the care and caution it requires? If you're ready to move toward a CCaaS solution, consider a few keys for assuring a successful migration:



- 1. Map your customer journeys:** In contact centers, the starting point for all cloud migration is to map your existing customer journey so you have a complete picture of everything that needs to be transposed into the new system. If you have thousands of IVR paths, like many companies, this can be incredibly time and labor intensive. It's faster and more efficient to use an automated testing solution that includes [discovery mapping capabilities](#)<sup>3</sup>. Once you've mapped these journeys and moved them to the cloud, you can update and optimize freely.
- 2. Craft your tests:** As you optimize and design new customer journeys, you'll want to craft a suite of automated regression tests that you can run throughout the migration. Here again, the ideal testing solution can automatically create and update these tests in conjunction with the journey design process.
- 3. Prepare to scale:** Realizing this major benefit of cloud migration requires extensive load testing, not just once, but continuously. You need the ability to constantly examine your new network, test it under pressure, and ensure it can scale up to meet your needs.
- 4. Automate testing and monitoring:** When embarking on a cloud migration journey, companies like the consumer electronics brand we mentioned quickly discover that this new system demands much more testing monitoring than they're used to. Manual processes won't cut it anymore. You'll need robust automated solutions that can deliver continuous testing and monitoring – during development and in the live production environment.

If you prioritize these four essentials, you'll have a solid foundation for cloud migration success. Make sure you have the right migration and testing partners in place to ensure you can put these essentials first, and you'll be well on your way.

**Cyara's award-winning CX Assurance Platform helps companies accelerate customer experience development, increase quality across all digital and voice channels, and assure customer journeys end-to-end. We've helped countless brands ensure their cloud migration is a success by delivering automated testing, monitoring, and CX assurance at scale.**

Learn more at [cyara.com](https://cyara.com)



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#### Footnotes:

- \* Gartner. "[Gartner Magic Quadrant for Contact Center as a Service](#)." Nov. 9, 2020. (Cited [here](#)).
- † McKinsey and Company. "[Cloud-Migration Opportunity: Business Value Grows, but Missteps Abound](#)." Oct. 12, 2021.
- \*\* AVANT. "[6-12 Report: CCAAS](#)." June 2021.
- †† Forrester Research, cited in Genesys. "[The Not-So-Scare Way To Level Up Your Contact Center](#)." Oct. 30, 2019.

#### Links:

- 1 <https://blog.cyara.com/contact-center-ready-smooth-cloud-migration>
- 2 <https://blog.cyara.com/get-your-contact-center-digital-transformation-started-with-devops>
- 3 <https://cyara.com/solutions/ivr-discovery/>



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