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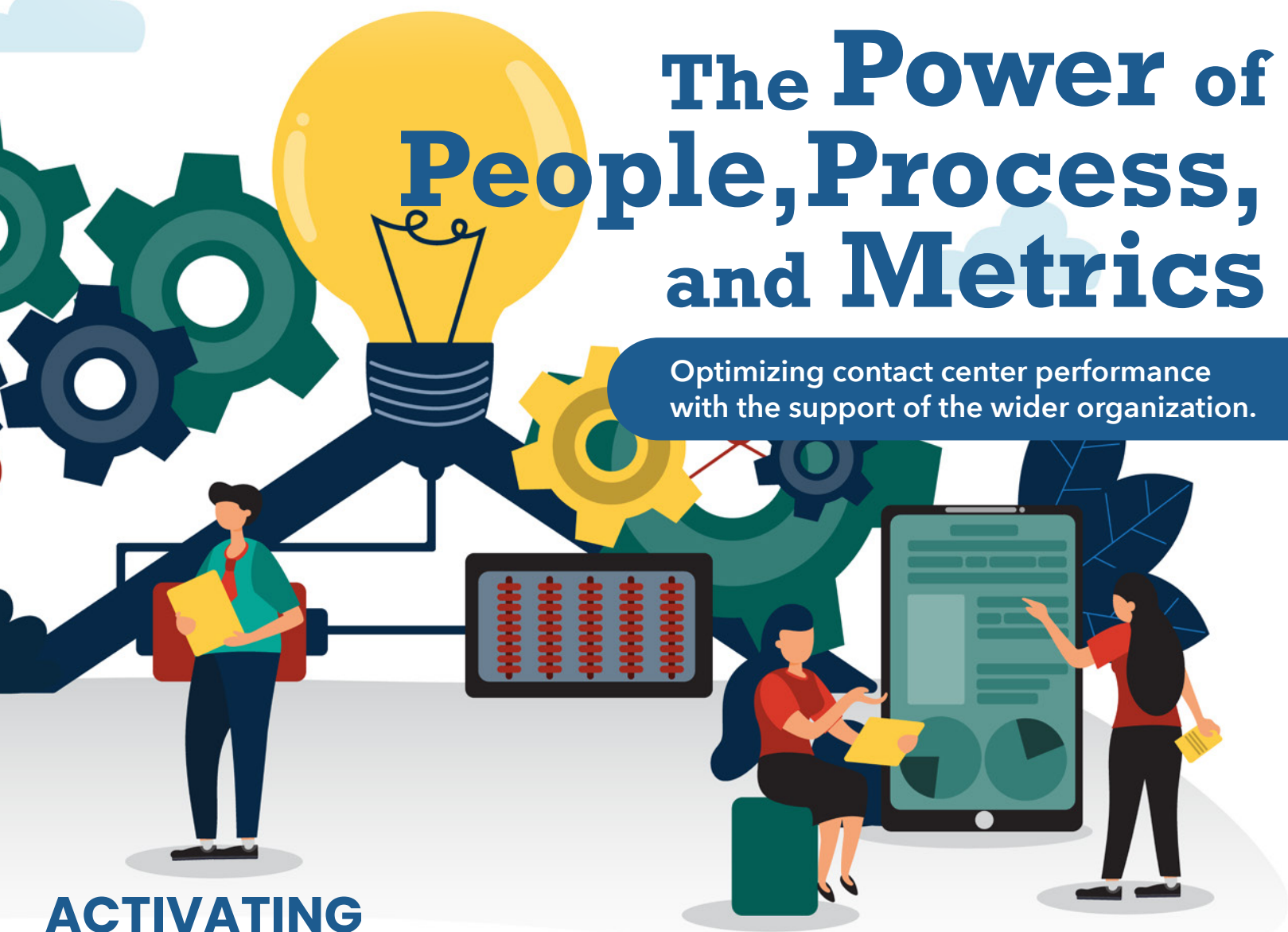


# CX Insight

AN EXECS IN THE KNOW PUBLICATION

## The Power of People, Process, and Metrics

Optimizing contact center performance  
with the support of the wider organization.



**ACTIVATING  
CROSS-FUNCTIONAL  
TEAMS FOR BETTER CX**

**BRAND SPOTLIGHT: Shipt**

**IT'S TIME TO HARNESS THE POWER  
OF THE 360° CUSTOMER PROFILE**

**THE CHANGING  
FACE OF CONTACT  
CENTER KPIs**



# CX Insight

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

**Exploring the people, processes, and metrics that lead to CX success.**

Customer experience (CX) is a team sport. But it's not just people. Creating exceptional CX requires a whole host of processes and technologies, as well as careful monitoring of performance and outcomes, all working in tandem to make sure experiences are as friction-free and enjoyable as possible. Although much of the action happens behind the scenes, a well-oiled CX machine can leave an indelible impression on customers.

In this issue, we take a closer look at some of the must-have CX elements outlined above, including the importance of cross-functional teams and a reimagining of contact center KPIs. We also expand upon a recent interview with NAMI's Denise Bjurholm in discussing ways to improve the mental health of the CX workforce.

Along with the above articles tough on operations, this issue also contains an insider's look at Shipt through a special Brand Spotlight featuring Timothy Rauschenback, as well as a KIA Member Spotlight featuring Daniel McFadden from PAR. 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. 🚀

Have a story idea? Submit it to [info@execsintheknow.com](mailto:info@execsintheknow.com).

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# Activating Cross-Functional Teams for Better CX

**The importance of working together to deliver an improved experience**

*by Execs In The Know*

As customer experience (CX) leaders, we are consistently focused on ways to deliver better experiences, and there's no shortage of projects on our to-do lists to accomplish this goal! With different workforce models now in play, we are forced to be more creative in the ways we work together to deliver improvements to our customer and employee experiences. In addition, our work

frequently requires efforts from multiple departments across the organization. Although the concept of a cross-functional team is not a new one, ensuring that we build the right employee group to maximize the benefits of collaboration on CX-improvement projects in our current environment deserves a second look.

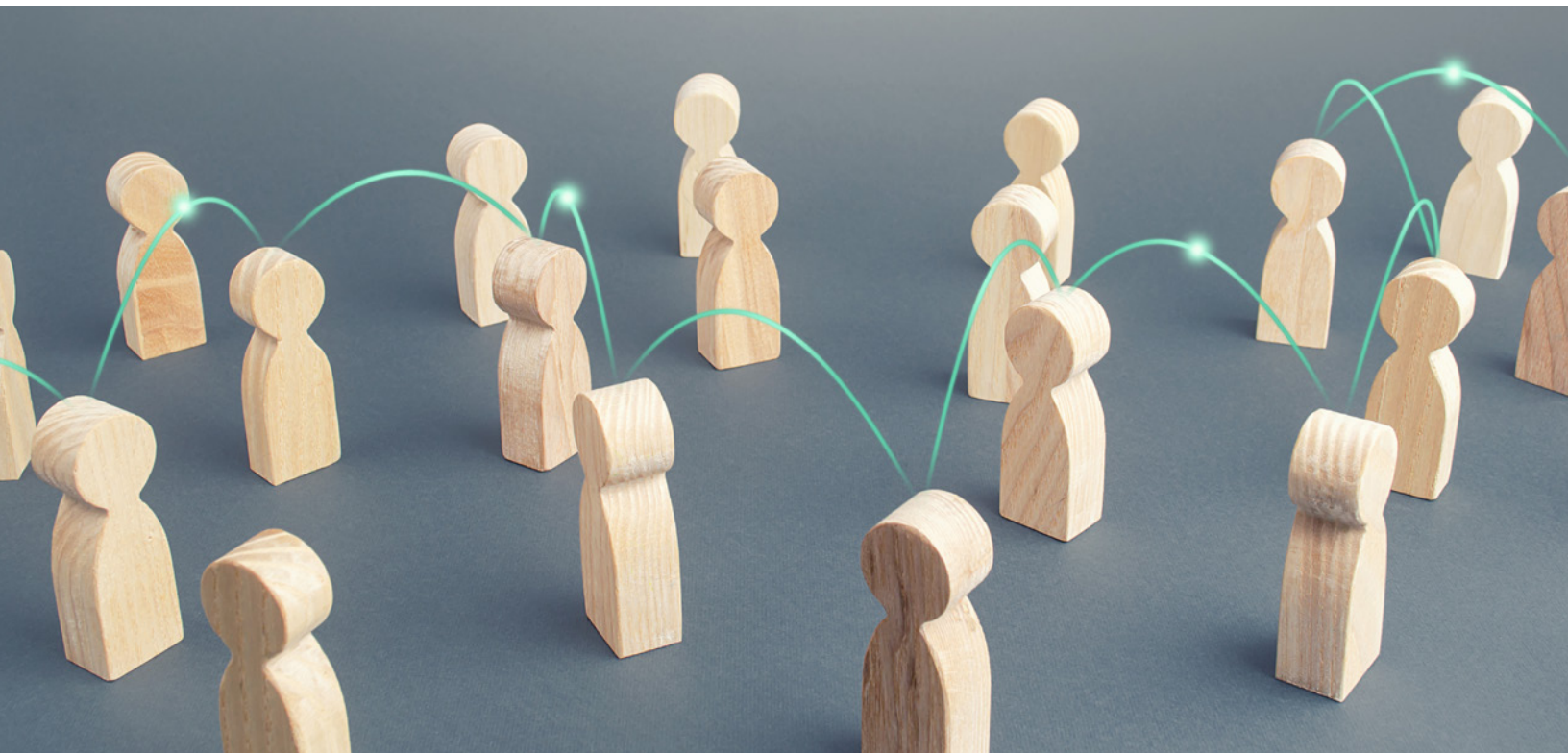
## The Power of Cross-Functional Teams

At a high level, a cross-functional team is a group of colleagues with complementary skills who work together to achieve common goals. This group includes representatives with different functional expertise from various parts of the organization that come together to form a working team. The team members may be directly or indirectly involved with the customer, but since CX is everyone's job, they all add value when working on projects to improve experiences.

A well-designed, effective cross-functional team has many benefits and can supercharge CX work. First – and arguably most important – this team helps break down silos and increase collaboration across the organization. One of the biggest obstacles CX projects can face is a lack of coordination and buy-in from all groups involved. By nature, employees tend to

focus on the department's work, and a cross-functional team can expand this focus to other parts of the organization. A cross-functional team powers a more inclusive environment and enables employees to gain a broader perspective.

Another benefit of bringing a team like this together is the positive impact of increased communication and reduced risk. A robust communication plan that shares project goals and updates will help ensure that the right information is distributed to the right individuals across the organization. Keeping team members informed and working together also reduces risk, particularly when challenges arise. Getting input from multiple perspectives can ensure the best solutions are brought forward for consideration. Many projects face obstacles, and having a team that represents different views can help circumvent or solve these challenges efficiently and effectively.



In addition to bringing unique and varied perspectives to projects, the best cross-functional teams are mutually accountable for the success of the collective group. This focus on shared success serves to strengthen the team and helps bond them as a working unit. Metrics are defined and measured regularly, with mid-course corrections and celebration of key achievements along the way.

Together, these benefits help improve the employee experience and highlight the positive impacts of working together. Culture is a critical part of employee experience, and cross-functional teams help foster a standard of collaboration and creativity. When this team works as a unit, it breaks down silos, maximizes collaboration and deepens relationships across the organization – all important to strengthening the culture. It helps employees understand how different parts of the organization contribute to the overall mission, increasing their value and satisfaction. Building this awareness is a type of cross-training that expands employee knowledge.

These positive internal benefits combine to target our primary focus: improving the

experiences customers have during brand interactions. With a strong, focused, and effective cross-functional team, CX surely stands to improve!

### Building the Best Team

So, how do you create the best cross-functional team? For one, the composition matters! Including various groups from Customer Service is a must. In addition to thinking about the teams that will plan (Program Management, Project Management), execute (Frontline Customer Service Representatives and Managers) and oversee (Leadership) the work, consider broader representation from across the Customer Service department, such as Communications, Quality, Training and Workforce Management.

While including various departments from Customer Service is relatively commonplace, employees from other parts of the organization may also have important contributions. Consider expanding your team with colleagues from other areas to get a broader perspective. Many other departments could be part of the cross-functional team, and here are just a few to consider, and the associated benefits:

DEPARTMENT	BENEFIT
FINANCE	Helps the team understand the financial implications of the project, including up-front costs and return on investment
HR	Represents the employee perspective, and can highlight risks to consider
INSIGHTS	Shares Voice of the Customer data and helps measure and track the associated improvements
IT	Highlights and quantifies the technology requirements based on the business need
MARKETING	Represents the voice of the brand and helps connect customer-facing campaigns to support needed resources
PRODUCT	Educates the team on ongoing or planned product improvement projects related to the initiative

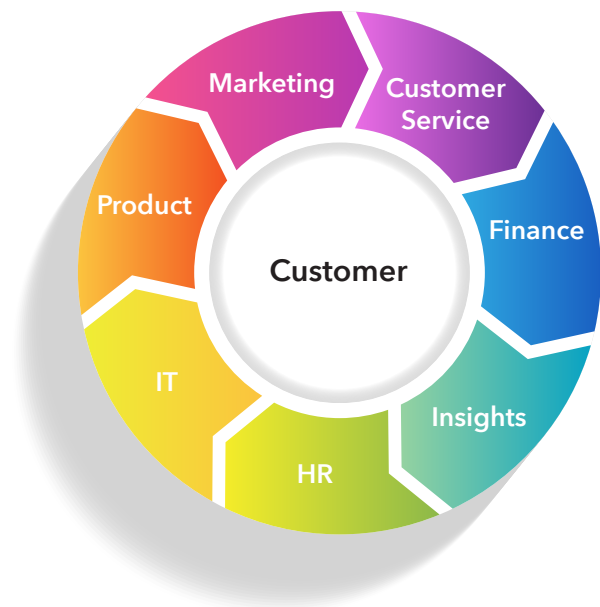


## Ways to Activate Cross-Functional Teams

Once you identify the team composition that works best for your organization, create a plan to activate that team and set it up for maximum success. Consider some of these tactics, even if you already use cross-functional teams in your company.

First and foremost, secure a mandate from leadership. Find the highest-ranking person in the organization, explain the mission of the cross-functional team, and ask for support. Work with them to write the invitation email to the team members you've selected, outlining the role, the importance of the work and expectations. Having the buy-in from the top on down will help others understand the importance of the work and follow suit.

Creating a plan that outlines how the team operates is a great second step. This plan should include an overview of the project,



defined goals, success metrics, team commitments and checkpoints. Sharing the details of how the team works (e.g., meeting schedule, communication standards, escalation paths) is also critical to understanding what's

required and how the team will function. Due to the nature of the work and to be “better safe than sorry,” the cross-functional team leadership should prepare for conflicts and have a resolution plan at the ready.

Another way to activate a cross-functional team is to develop and execute a robust communications plan with dedicated channels to keep members informed throughout the project. This dynamic plan should include ways to regularly communicate status, activities, progress and upcoming deadlines. It should also include reporting against the agreed-upon success metrics, any challenges that the team is facing and celebrations of success.

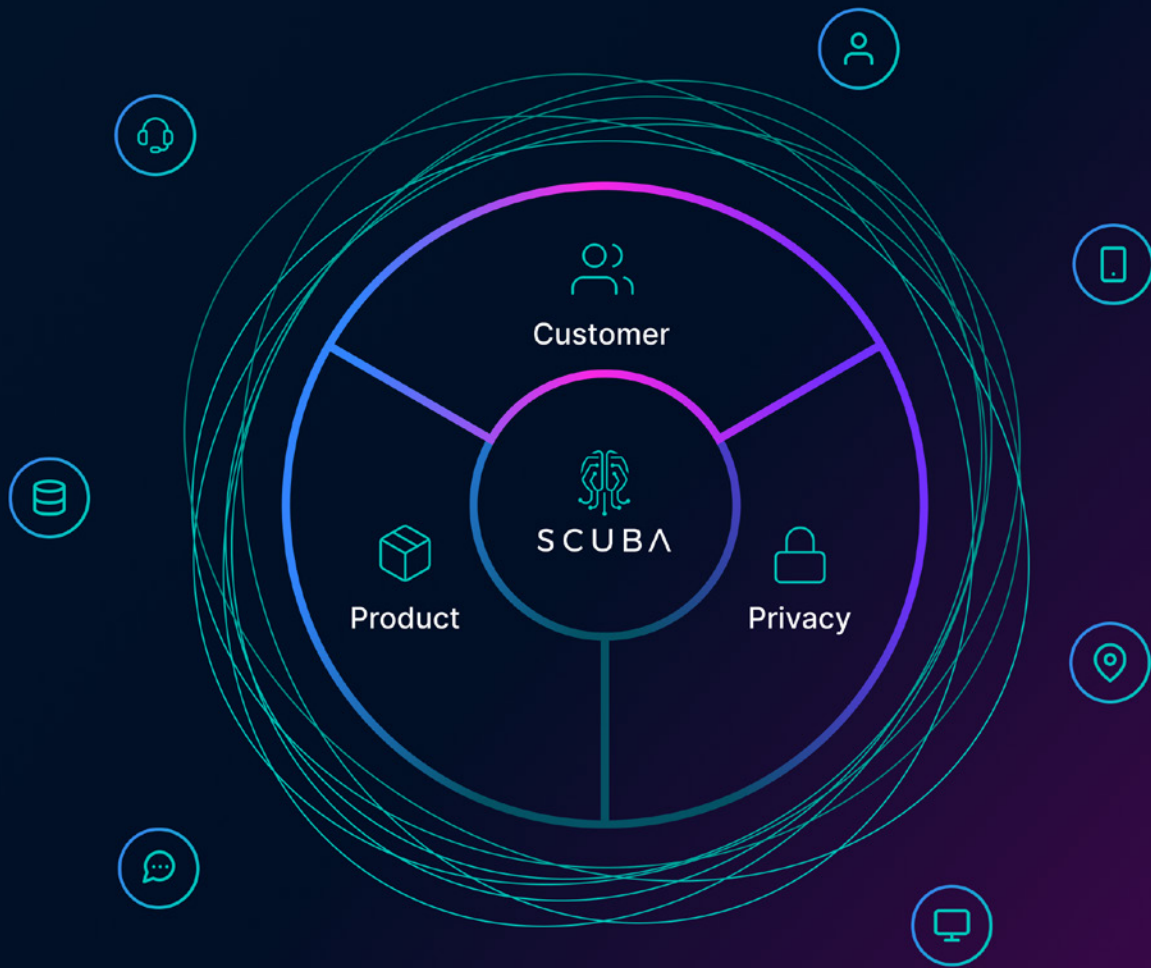
Ownership of this plan is a great assignment for the team member from the Communications department. And do not limit communications to the cross-functional team alone; devise ways to share project updates with the broader organization to keep them apprised of the progress (important) and how the team is collaborating (more important).

## Conclusion

A cross-functional team focused on CX-improvement projects can have wide-reaching impacts across the company, including benefits to the business, employees, and customers. From a business perspective, creating a team that offers different viewpoints and expertise can improve the culture, productivity, and overall success. Employees can improve their understanding of how the projects are managed, strengthen collaboration skills, and deepen relationships across the organization. These teams help employees understand how different parts of the organization contribute to the overall mission, improving their experience, value, and satisfaction.

Cross-functional teams offer a unique opportunity for CX projects, since the way brands interact with and treat customers is

everyone's job. When considering the customer lifecycle, CX cuts across the entire organization. Ultimately, we all work for our customers, so collaborating across the company can only improve our efforts to improve CX. And, finally and most important, customers benefit from the CX improvements the team makes on their behalf. Happier customers deliver better results. ✂



# It's Time to Harness the Power of the 360° Customer Profile

## How investing in 360° customer profiles can improve customer retention and reduce churn

by Tony Ayaz, CEO and Board Member,  
Scuba Analytics

In a post-digital transformation era, there's no going back. No going back to traditional business intelligence (BI) tools. No going back to exploring static data. And no going back to stale customer insights.

Instead, brands must have better tools and strategies in place to keep up with real-time customer demands, dubbed "customer now." While the shift to CX is not new, how brands approach it requires a deeper level of granularity of customer behavior and data – all

of which are critical in attracting and retaining customers.

But what does that evolution look like, and what does it require from brands? How can brands take CX to the next level?

A recent [Forbes](#)<sup>1</sup> report found that 96% of customers consider CX important to brand loyalty, and 84% of brands that prioritize CX reported increased revenue. The bad news is that, unlike horseshoes and hand grenades, "close" isn't good enough when it comes to understanding your customers.

To increase customer retention, brands need

holistic, persistently updated customer profiles borne of extensive identity resolution processes. Whether you stitch together data insights with reverse IP, identity resolution, or CDPs, brands need profiles that are comprehensive, predictive, and easily digestible by all departments across an organization.

In other words, your brand needs 360° customer profiles.

## A 360° View of the Customer

A 360° customer profile consists of all of your customer's information aggregated into one place and analyzed for actionable insights. Some of the information necessary for a comprehensive 360° profile include:

- **Demographic:** Who is your customer? How old are they? What is their income?
- **Geographic:** Where does your customer live? What is their housing situation? What time zone are they in? Are they in an urban, suburban, or rural area?
- **Communication preferences:** Which channels are you most likely to reach your customers in? What marketing campaigns do they respond to? What are their interactions with your website and across other channels like email, social media, paid advertising, and IoT devices?
- **Customer history:** What are the customer's purchase history and product usage? What other interactions and digital touchpoints has a customer had with your brand or across their connected IoT devices?
- **Brand perception:** Does the customer feel the brand aligns with their values? Have they completed brand surveys or left feedback? Are they sharing your web pages and content? Do they recommend your product or brand? And if so, how does it impact your brand?

- **Needs:** Does the customer require premium services? Are prices too high for a customer to engage? Are there any patterns correlated to their needs (seasonal or otherwise)?
- **Loyalty:** How often does the customer engage with your brand? How long have they been a customer? Do they purchase numerous products and services from your brand, or have one area of focus and needs? Have they referred your brand to friends or family?

Once aggregated, this data paints a holistic portrait of a customer's past, present, and likely future – all easily viewed under a single pane of glass.

## An Uphill Battle Without a 360° View

A recent Gartner study revealed a startling contradiction: although 82% of organizations aspire to build 360° customer profiles, only 14% of organizations have achieved this.

Although brands may be intimidated by such a daunting task, falling behind the competition will cost brands in the long-run. Some CX challenges without a 360° customer profile include:

- **Poor data quality:** Organizations compiling customer information across multiple disparate systems may be inadvertently sully their data. For example, a name could be spelled multiple ways, a customer could have multiple emails, or a street address may or may not be abbreviated. Although small errors may seem benign, poor data can seriously corrode customer trust. A recent study found that [72%<sup>2</sup>](#) of organizations believed poor data negatively affected customer engagement and satisfaction. Do you believe poor data quality has affected your customers?
- **Limited omnichannel communication:** Omnichannel communication only works if

customer data is formatted and managed consistently across your entire organization. Individual teams utilizing different systems could cause embarrassing – and potentially damaging – oversights, such as marketing and customer service teams engaging the same customer at the same time or providing a discount code after they've already checked out. How aligned are your omnichannel efforts?

- **Missed opportunities:** Limited customer profile views equate to limited opportunities. Consider a recent [Gartner](#)<sup>3</sup> study, which found that 26% of respondents were overwhelmed by marketing emails – and 15% of respondents found them annoying. For those brands, a 360° customer profile could have flagged customer discontent or low email engagement before it negatively impacted their brand perception. Can your brand afford to annoy your customers?

## Benefits of 360° Customer Profiles Brands Can't Afford to Ignore

A customer's digital touchpoints and footprints help complete the larger puzzle of their profile. Having missing pieces to that puzzle can be challenging in more ways than one, as mentioned above. But, when pieced together correctly, the completed puzzle of a customer's profile gives your brand unparalleled insights.

The benefits of 360° customer profiles speak for themselves:

- **Intuitive access:** 360° degree customer profiles are intuitive by design. Every team in your organization, regardless of technical expertise, can better understand your customers. By removing silos across teams, everyone in your company can have a clear understanding of the customer – and leverage that information to improve product features, marketing strategies, or improved customer service efforts.

### Digital Adoption Story

These panels are associated with metrics for monitoring user behaviors by subscription type. The product marketing team implemented these metrics to support our initiatives around increasing free customer conversion to paid customers. We have produced 4 distinct datapoints to understand our progress in this. These track purchases, total number of users and support tickets split by their license type. The flow below also shows the typical user upgrade journey from promotional email to their first support call.

#### Digital Users by Subscription Type



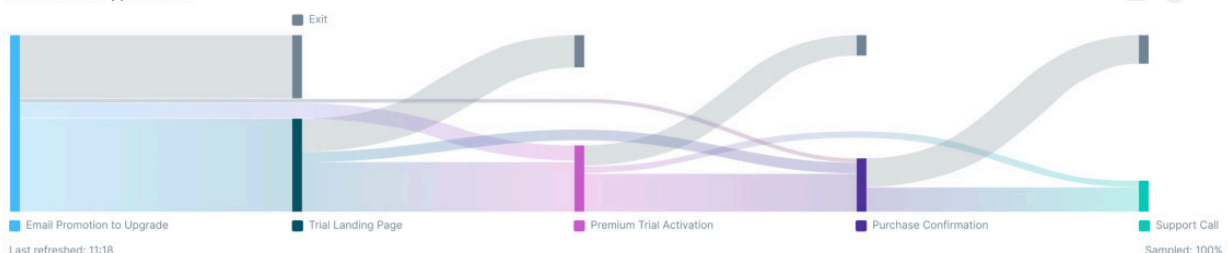
#### Digital Purchases % by Subscription Type



#### Support Tickets by Subscription Type



#### Purchase to Support Ticket



- **More accurate data:** Eliminating duplicate and incorrect data allows for more accurate data-driven insights. For example, when used alongside a behavioral analytics platform, profiles can unify all of a customer's email addresses to reduce duplicate contacts, and better track a customer's activity and journeys. With more sophisticated data, brands can feel confident in their decisions when buoyed by 360° customer profiles.
- **Truly comprehensive:** The sum of the whole is greater than individual parts. By having all your customer's information in a single view, brands can correlate otherwise disparate information into actionable insights.
- **Enhanced personalization:** Customer loyalty is earned, not given. By learning more about their customers, brands can take data-driven actions to improve customer relations and drive retention. More often than not, thoughtful and data-backed personalization can increase customer satisfaction and loyalty, and drive profits.
- **Improved bottom line and ROI:** The best customers are repeat customers. Just by retaining [5%](#)<sup>4</sup> more customers each year, brands could see up to 95% in profits. A 360° customer profile ensures your brand is doing everything it can to keep customers engaged, loyal, and happy throughout the entire customer lifecycle.

## How to Build a 360° Customer Profile

The idea of crafting an all-encompassing customer profile may seem daunting at first. But

there are clear, actionable steps brands can take to successfully build a 360° customer profile.

1. **Define your scope:** This common obstacle for early 360° customer profile development is "scope creep," or when vaguely defined parameters become too large to practically execute. Before investing in 360° customer profiles, brands should take a moment to clearly define which KPIs and customer data they want to track. Brands may want to know everything about their customers, but should start with tangible goals.
2. **Perform a data audit:** Insights gleaned from customer profiles won't carry much weight if the data behind them is inaccurate. A data audit can help clean and organize your data by reformatting all data into a consistent view, accessible by all teams. Since this can be time-consuming, many organizations use tools to help simplify and automate the ETL process.
3. **Leverage real-time analytics:** Any time a customer interacts with your brand, that information should be recorded and shared within a platform used by the whole company, regardless of team. By juxtaposing seemingly isolated data points into a single view, your brand is much more likely to discover customer behavior patterns. A tool like Scuba, for example, offers real-time behavioral analytics on the fly – all while unifying your customer data.
4. **Supplement existing data:** Just because

+100TB

Real-time digital events processed weekly

+500M

Active subscribers managed

+100M

ROI through predictive business insights

the profile is finished doesn't mean your work is. Brands must continue to refine and contextualize their data by supplementing it with additional research, such as tracking customers' social media usage or collecting customer feedback through surveys. This supplemental data can also be used to identify blind spots and further improve engagement. Analytics tools should be able to accommodate the scale of data points, and shouldn't limit your time to insights – which is where real-time analytics can help.

As your customer profiles become more comprehensive, your analytics may struggle to keep up. Brands need [real-time](#)<sup>5</sup> analytics to capture and track customer activity as it happens, which will increase time-to-insights. When Salesforce introduced real-time data management to their marketing times, their ROI increased by [28%](#)<sup>6</sup>.

## Elevate Your 360° Customer Profiles With Scuba

Creating a truly 360° customer profile is easier said than done. With endless touchpoints across a vast digital landscape, it can be challenging to capture activity and accurately develop profiles.

That's where Scuba Analytics can help. Brands like [Comcast](#)<sup>7</sup> have been able to harness the power of Scuba to improve their analytics and truly build 360° customer profiles. With Scuba, Comcast ingests billions of events from over 70 channels of data each month, giving them real-time, 360° visibility into customer insights.

Scuba's real-time continuous intelligence platform integrates with existing CDP and CRM software and elevates your 360° profiles even higher by optimizing resolution processes and increasing insight speed.

By allowing Scuba to do the heavy lifting, your brand can focus on what matters: improving customer service, driving revenue, and reducing churn.

Want to learn more about how to elevate your 360° customer profiles? Request a [demo today](#)<sup>8</sup> or talk to a [Scuba expert](#)<sup>9</sup>.

## Learn more at [scuba.io](#)

### Tony Ayaz

CEO and Board Member  
Scuba Analytics

Tony has over twenty years of experience as



a founder and executive focused on data analytics and platforms across APM, SIEMs and Business Intelligence. Tony has extensive experience in the execution of GTM strategies globally, early-stage investing, and scaling

companies toward IPO.



### Links:

- <https://www.forbes.com/sites/blakemorgan/2019/09/24/50-stats-that-prove-the-value-of-customer-experience/?sh=617786a64ef2>
- <https://www.snaplogic.com/company/media/press-releases/77-of-it-leaders-dont-fully-trust-the-data-in-their-organization-for-decision-making-according-to-new-research-from-snaplogic>
- <https://blogs.gartner.com/lindsey-roeschke/covid-fatigue-adjusting-email-communications-overwhelmed-consumers/>
- [https://www.braze.com/resources/reports-and-guides/2020-retention-guide-for-modern-marketers?utm\\_medium=paid-search&utm\\_source=google&utm\\_campaign=fy22-amer-acq\\_e\\_retention-marketing&utm\\_content=mt\\_brand\\_ad\\_copy\\_fy22&utm\\_term=customer-retention\\_pm%7Ccustomer%20retention%7Cp%7Cg%7Cc%7C572731153891&\\_bt=572731153891&bk=customer%20retention&\\_bm=p&\\_bn=g&gclid=Cj0KCQjwwJuVBhCAARIsAOPwGAT98iO1Kb7uNsKidyHNZLyZ-moMNdovuR8u7o3iGEV0APBOSiXwMOsaAowUEALw\\_wcB](https://www.braze.com/resources/reports-and-guides/2020-retention-guide-for-modern-marketers?utm_medium=paid-search&utm_source=google&utm_campaign=fy22-amer-acq_e_retention-marketing&utm_content=mt_brand_ad_copy_fy22&utm_term=customer-retention_pm%7Ccustomer%20retention%7Cp%7Cg%7Cc%7C572731153891&_bt=572731153891&bk=customer%20retention&_bm=p&_bn=g&gclid=Cj0KCQjwwJuVBhCAARIsAOPwGAT98iO1Kb7uNsKidyHNZLyZ-moMNdovuR8u7o3iGEV0APBOSiXwMOsaAowUEALw_wcB)
- <https://info.scuba.io/en-us/real-time-analytics>
- <https://www.salesforce.com/blog/use-customer-data-to-increase-marketing-roi/>
- <https://www.scuba.io/hubfs/Case%20Studies/Scuba%20Case%20Study%20-%20Comcast.pdf>
- <https://info.scuba.io/explore-demo-lp>
- <https://www.scuba.io/request-demo>



# How CX Efficiency is a Win-Win for Customers and Employees

## Five Key Priorities for Improving Customer Satisfaction and Lowering Cost-to-Serve

*by Claire Beatty, Senior Director, Thought Leadership, Genesys*

Seventy percent of consumers worldwide say a company is [only as good as its service](#)<sup>1</sup>. This means there's no time for complacency in customer experience. Businesses need to move at the speed of the customer by keeping pace with the latest strategies, technologies and trends. At the same time, CX leaders are looking closely at cost-to-serve, expecting a clear return of investment on transformation initiatives.

A focus on efficiency is typically the path taken to reduce cost-to-serve. And yet, an efficiency drive that focuses purely on cost metrics is likely to leave customer and employee experiences lacking. At a time when loyalty is more critical than ever before, organizations need a better approach.

When efficiency is customer- and employee-centric, it creates a crucial win-win that businesses need to remain competitive. Efficient experiences can also be highly empathetic, allowing customers and employees to achieve their goals, all while cutting a company's service costs.

The key to customer- and employee-centric efficiency is the strategic use of CX technology. Today's technologies enable organizations to streamline processes in myriad ways. For example, AI can predict intent, which helps increase first-contact resolution. Chatbots can handle and triage requests, reducing agent-assisted interactions. Advanced analytics tools can provide the insights needed to contextually personalize interactions, shortening time-to-resolution.

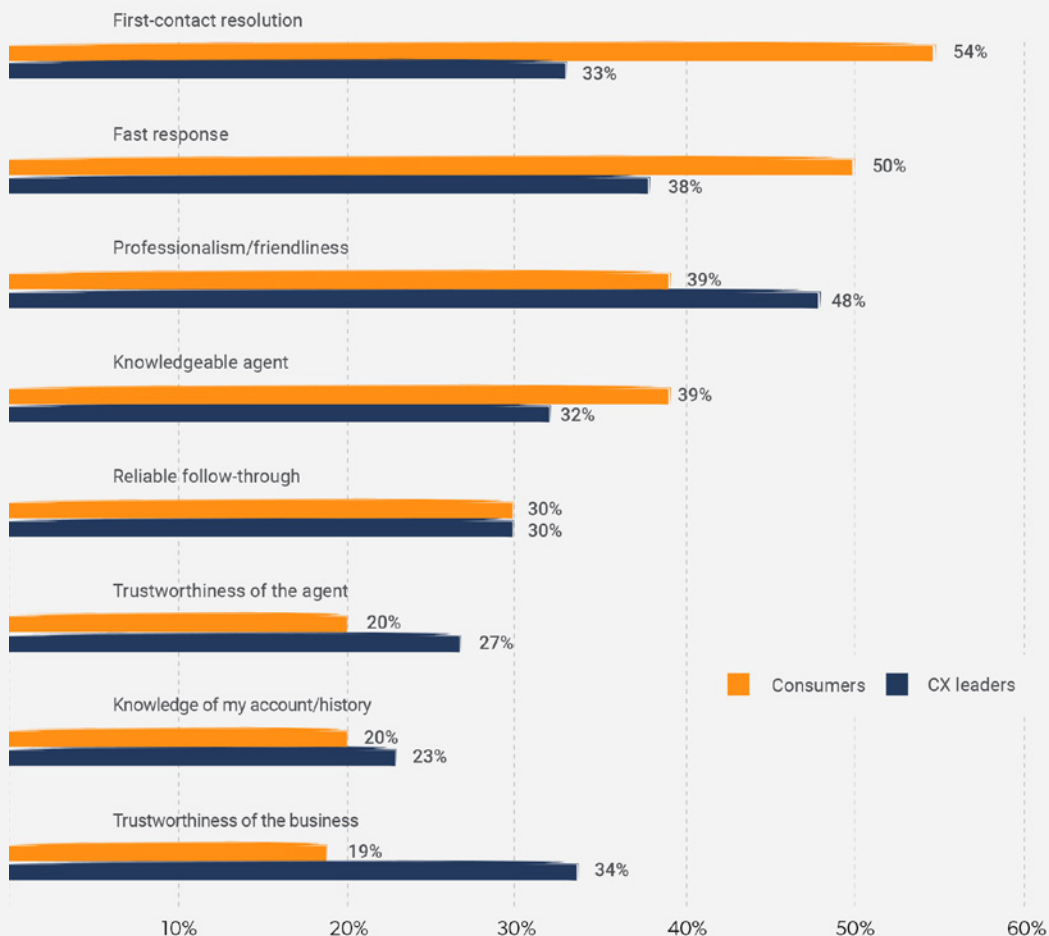
## Focus on time-to-resolution

It may seem counter-intuitive, but customers want efficiency – that's being heard, understood and having their issue resolved completely. In fact, a recent global survey found more than half of consumers globally say their greatest priority in a service interaction is a [first-contact resolution](#)<sup>2</sup>.

Business leaders, however, say they are most focused on agent professionalism, friendliness and providing a fast response, when interacting with customers. Just 41% of leaders say their company is very effective in achieving a first-contact resolution. There is an efficiency gap to close.

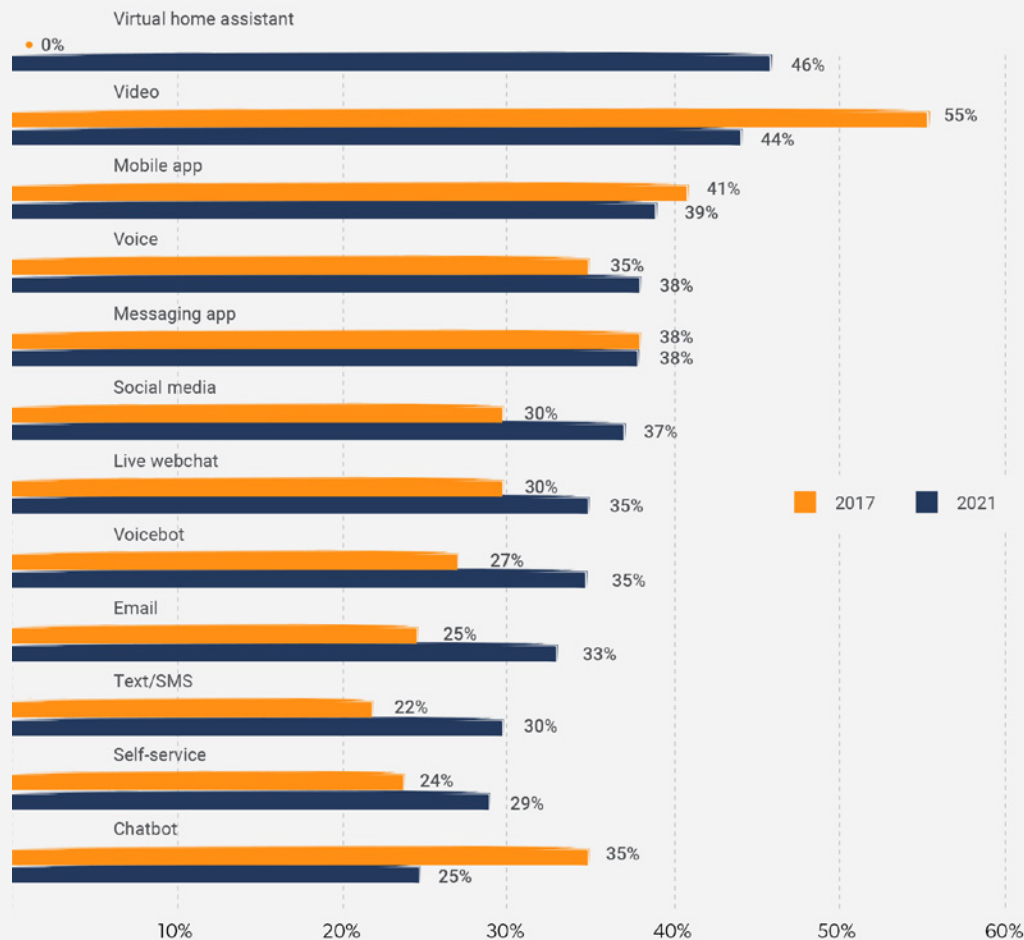
The first step toward closing that gap is understanding what is driving repeat interactions. Why are customers being directed across channels and how can those root causes be addressed?

Consumers and CX leaders: Which of these do you/does your company value the most in a customer service interaction?



Source: The State of Customer Experience, Genesys, 2021

Consumers: Rate your overall satisfaction with each of the methods you use to interact with customer service (% selecting "highly effective")



Source: The State of Customer Experience, Genesys, 2021 (Global survey of 2,600 consumers and 690 business leaders)

A leading strategy for businesses to improve efficiency is to increase self-service. Genesys customers are generally working towards upwards of 50% of customer interactions to be successfully managed by self-service channels. When these channels work best, they use AI to provide contextually relevant information and interactions, are built for purpose and well-integrated with agent-assisted channels.

## Banish bad bots

More than a third of consumers say they have used a chatbot within the past year. But just a quarter are highly satisfied with those experiences. In fact, satisfaction with chatbots has declined in the recent years.

How can businesses banish those bad bots? It's time to bring in AI. Instead of just serving as an interactive FAQ, chatbots should recognize known customers and use on-site behavior data to understand intent and personalize interactions. A shift from "How may I help you?" to "I see you got an error on the previous page. Would you like assistance with that?" creates a more efficient and engaging interaction. About one-third of surveyed business leaders [use AI to power conversational chatbots](#)<sup>3</sup>, and 37% say they plan to do so in the coming year. Similarly, AI-powered voicebots can use customer profile and intent data to streamline, triage or complete interactions.



## Let technology do the hard work

There are several other ways that technology can increase efficiency and experience. Predictive routing uses AI to match customers with the best-placed agent for resolving their specific issue. Predictive analytics can deliver next-best-action recommendations to increase conversions and shorten resolution time. Genesys research finds less than one-third of companies are currently using these approaches, but a further 40% plan to do so in the coming year.

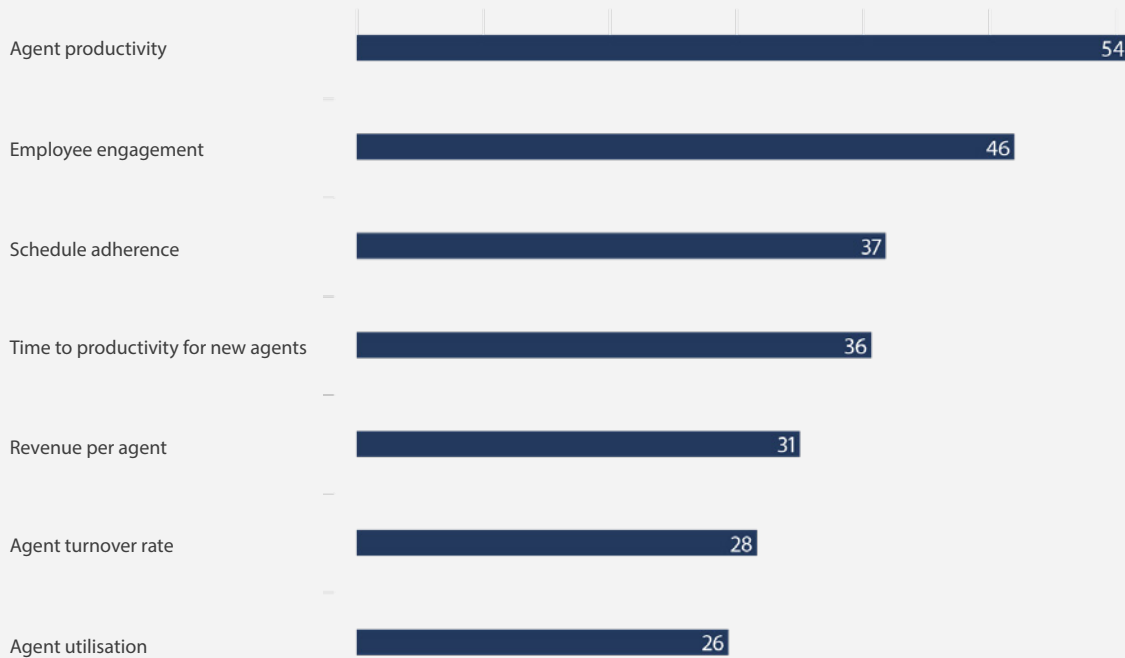
Another way to increase efficiency is to use AI for forecasting and scheduling to better manage spikes in volume. This avoids customers (and employees) becoming frustrated at peak times and employees sitting idle in quieter periods.

Other, simple shifts can make a huge difference to efficiency. For instance, providing a call-back option that allows customers to retain their place in the queue reduces the number of calls managed by a company's third-party overflow partners. Customers also benefit by having a choice rather than being forced to wait.

## Manage for empathy

Many CX employees are compensated and coached on being efficient. A survey of more than 1,000 US contact center agents found 56% consider [their greatest strength](#)<sup>4</sup> to be efficiency, speed and adherence. On the flip side, just 7% said their greatest strength was quality, listening and empathy.

Which of the following employee metrics have seen the most substantial improvements since your organisation's implementation of AI? (%)



Source: *AI Comes of Age, Economist Impact, 2021, (Global survey of 750 CX leaders)*

To give employees more time to focus on the listening and understanding part of their job, technology can bring the efficiency. Some of those capabilities include automating routine manual processes and administration to reduce employee stress, using AI to identify coaching and training opportunities, monitoring sentiment in real time to allow agents to course-correct and adding gamification to deliver results against desired metrics in a fun and engaging way.

The result of a better working environment? A stronger employee value proposition that reduces hiring and onboarding costs, boosts engagement and productivity, and ultimately makes customers happier. Since retaining customers is far more cost-effective than acquiring new ones, these efficiencies translate into real savings.

## Get to grips with data

Modern CX technology generates a wealth of data that businesses can use to unlock efficiency and improve experiences. This starts with knowing who your customer is and predicting why they might be interacting with your business. We call the technologies that support these capabilities the [“Systems of Listening.”](#)<sup>5</sup> They use AI to develop a deep understanding of customers to include their preferences, web activity and conversation history, allowing for real-time engagement and personalization.

However, many businesses are still experiencing challenges around data siloes and information blind spots. Almost half of surveyed business leaders say their agents need to look up customer identification information during voice or digital interactions, rather than having it readily available. And only one-quarter conduct identity stitching (linking identifiers such as cookies and social media handles) to build a more complete picture of their customers.

# CASE STUDY

## Company Nurse<sup>6</sup>

Company Nurse specializes in workplace injury management. It has registered nurses available 24/7 to triage workplace injuries and get workers' compensation claims off to an ideal start.

With Millennials and Generation Z entering the workplace and organizations becoming more distributed, Company Nurse needed to ensure that injured workers could connect via multiple channels. But its existing on-premises system was expensive to maintain and manage. Additionally, there was no real-time visibility into contact center operations or effective way to organize data into configurable reports and measurable KPIs.

Company Nurse implemented Genesys Cloud CX™ for phone and email in a matter of weeks, and took a phased approach for channels like SMS, social media and web chat (including click-to-dial functionality), along with proactive functions like outbound dialing and push notifications.

Since migrating to cloud, Company Nurse has improved its metrics across the board:

- 269% ROI with 4.8-month payback
- \$50,000 saved annually with reduced overflow calls
- 20% increase in call volume without adding agents
- 21% decrease in agent idle time
- 11-13% decrease in average handle time
- 10-point rise in adherence levels, from low 80s to mid-90s

**"Genesys Cloud CX is a beautiful, reliable tool that creates a positive experience for both our agents and our customers," said Henry Svendblad, Chief Technology Officer at Company Nurse. "There aren't too many instances where you can have a positive impact on every stakeholder in the process. With Genesys Cloud CX, we do."**

## Efficiency leads to myriad business benefits

Faster and more complete customer interactions increase loyalty, engagement and retention – both of customers and employees. And that's why being efficient is really at the heart of being empathetic. If you put yourself in the shoes of the customer, you want to complete your sale or service request as quickly and conveniently as possible. Being known and heard is the most efficient and rewarding response. As an employee, you want to succeed every day – meet your goals with high-quality work and pleasant, productive interactions. That's why for businesses, efficiency is a win-win-win.

Learn more at [Genesys.com](https://www.genesys.com)



**Claire Beatty**  
*Senior Director, Thought Leadership*  
Genesys

Claire leads Thought Leadership for Genesys, writing about innovation

across the customer journey, digital transformation, AI and the future of work. She previously held editorial roles at MIT Technology Review and the Economist Intelligence Unit.



### Links:

- 1 <https://www.genesys.com/resources/the-connected-customer-experience>
- 2 <https://www.genesys.com/resources/state-of-cx-report>
- 3 <https://www.genesys.com/resources/ai-comes-of-age-report>
- 4 <https://www.genesys.com/resources/values-agent-performance>
- 5 <https://www.genesys.com/resources/white-paper-the-business-case-for-empathy>
- 6 <https://www.genesys.com/customer-stories/company-nurse>



Execs In The Know



# BRAND SPOTLIGHT

## Shipt

### Over-Delivering on Delivery

**An interview with Timothy Rauschenbach, Vice President of Customer Service at Shipt.**

Tim brings more than three decades of experience helping customers find superior satisfaction, launching his career with Disney, a company that knows a thing or two about creating exceptional experiences. Execs In The Know recently caught up with Tim to ask him a few questions about Shipt, his latest stop on his own personal journey of creating CX excellence.

**Execs In The Know (EITK):** Prior to joining Shipt, you've had stops at some of the biggest, most well-known brands on the planet. Can you talk about some of those experiences and how they brought you to Shipt?

**Timothy Rauschenbach:** I grew up on a small farm in northwestern Indiana, where I learned from my mom to focus on being my best each day. My childhood was a little different than most of my friends growing up. We had to store enough food during the spring, summer, and fall in our freezer, cellar, and pantry to have enough to eat to make it through the winter. That sense of purpose and work ethic provided the foundation of my academic, athletic, and professional growth over the past 35 years.

Being a part of an organization with a foundational purpose has always been my primary driver: 4-H, Boy Scouts, and farming all helped to feed my foundational core.

My first corporate job was with Disney. Experiencing service leadership and being able to internalize how my role was more than a job, and how we focused on connection and building lifelong relationships with our customers, who we called "guests," set a high bar for my professional career.



Later in my career, as the Global Vice President of Customer Service at Amazon.com, I was surrounded by executives, peers, and team members obsessed with raising the bar each day to higher levels, not being afraid of failing, and asking "what if" questions that no other leadership team on the globe asked. Again, this set my expectations to a new level in the continual pursuit of excellence in my career journey.

My most important job in my life is being a dad. My three amazing kids are my legacy. I know that my legacy has already been realized,



**TIMOTHY RAUSCHENBACH**

Vice President of  
Customer Service

because they all touch so many people in their lives. They have the hearts of servants. Once they graduated from college, I made the decision that I wanted to build another legacy, and that was to lead and serve a customer service organization and culture that constantly set a bar higher in both our performance and in the lives that we impact. I had to find the right organization in order for that to be possible. I did. I found Shipt.

**EITK: From the support team to Shoppers to customers, Shipt is a uniquely people-focused company. Where does this passion for people come from, and what does it look like in practice within the contact center?**

**Tim:** Here at Shipt, we genuinely believe in over-delivering delivery. Shipt brings the store to your door. Through a community of Shipt Shoppers and a convenient app, Shipt provides

personal shopping and delivery to millions of households in the United States. This service has become essential to so many of us, and we take pride in being able to help so many households get the essentials they need.

As a company that is deeply committed to equity and the deeply-held belief that every person counts, Shipt is a people-first company. We believe that each person authentically brings value. With that in mind, *"the firm belief that every person counts is core to who we are at Ship."* Our company engages with our workforce and listens, cares, and ensures our entire team's voices are heard in the decision-making process.

Within our contact center, we cascade this company motto into everything we do. We listen to frontline team members, value their feedback, and are not afraid to go the extra mile to engage all team members in areas they are passionate about or deeply care about. From a cultural standpoint, we believe that happy team members engage more in our purpose statement: Spark the connection that makes each person count. My goal is for team members to enjoy coming to work and are active participants in providing an outstanding support experience to all who need Shipt across the many communities we serve. Our mission statement for customer services is **to cultivate an inclusive, knowledgeable, and driven team to support our community of customers, shoppers, and partners with a commitment to Shipt's purpose and values through excellence, collaboration, and growth.**

A few key things that we continuously do in our contact center to bring this vision to life:

We continuously look for ways to invest in our team members' passions and futures: Our Guild and Pivot programs are just a couple of examples. We provide team members with benefits that allow them to have a good work/



life balance: VUTO, VTO, PTO, PSL, etc. We recognize and celebrate team members' wins and how they live out our company values, coming together to uplift each other. We invest in events, gifts, and moments of truth to celebrate as a team. We provide tools and a continuous feedback loop to ensure team members have a good working experience. We get to know our "Who's."

**EITK: Shipt has been growing quickly, moving from 27 cities in 2016 to more than 5,000 cities today. How does this rapid growth impact the priorities of the customer service organization, and what are some of the areas you are most focused on today?**

**Tim:** With the rapid growth of our business across the U.S. comes the rapid growth of our internal family here at Shipt. Our goal with the Experience Team (our highly trained

team of customer service agents) is to provide the support that our community needs with empathy and dedication to excellence. When we talk about priorities, it is imperative that we stay true to our purpose, and we prioritize:

- Hiring diverse teams that can help achieve goals
- Engaging and retaining talent
- Improving and evolving our training program
- Investing in tools and product design
- Optimizing our resources without losing on quality

Here at Shipt, we believe that our customer service team is a critical part of our growth strategy.



**EITK: Shipt offers “Always Open 24/7” support, something not many companies provide. Why does this investment make so much sense for Shipt, and what does it mean for Shoppers and customers?**

**Tim:** Well, as you know, Shipt is available across the U.S., including Hawaii. We also currently work with a growing number of partners, enabling us to serve so many communities across the U.S. With that being said, we believe it is imperative that customers, shoppers, and retailers have the ability to get in touch with our team at all hours of the day and night to receive assistance. We understand that each person who uses Shipt has different needs, and we want to ensure that reaching out to customer service is always an option for them.

**EITK: Unity, diversity, and inclusion can never be overestimated in its power to strengthen a team. What are some of the tactical ways you apply these values to empower your team?**

**Tim:** Diversity and Inclusion are rooted in who we are here at Shipt. Our core values of: **Caring, Authenticity, Positivity, Drive, and Rally** allow our team members to be their true selves at work. At Shipt, we offer so many avenues for team members to join and engage with employee resource groups, affinity groups and our Diversity, Equity, & Inclusion team, as well as others on our employee experience team. This has, in turn, provided an opportunity for our team members to feel truly empowered and give them a sense of belonging and purpose.

**EITK: As we head deeper into the second half of 2022, which Shipt initiatives are you most excited about? In which area of CX are you looking to make the biggest impact?**

**Tim:** As we head into the second half of 2022, I believe that I am most looking forward to seeing Shipt continue to invest in its most important asset: its people. We are continuing to grow many parts of our business, and we are working to offer our customers, members, and retailer communities the best support experience.

When it comes to CX, I believe we are a team that believes we can always improve and evolve to meet our community's needs, and I believe we welcome innovation that positively impacts our employee experience.

**EITK: Can you share a little bit about your involvement with Execs In The Know? How did you come across the community, and what should your peers know about EITK?**

**Tim:** I have been familiar with Chad for years, and have continually been impressed with Execs In The Know's insights and expertise. Even more important to me is the community that Chad has created. I continue to embrace the student mindset, and love to connect and learn from my peers and other experts in my field. There is no better place to achieve that than through Execs In The Know. 🌟



## 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 Tim Rauschenbach, and the entire team at Shipt for contributing to the Execs In The Know Brand Spotlight.

Interested in taking part in a future Brand Spotlight feature and sharing your story?

Contact us at [info@execsintheknow.com](mailto:info@execsintheknow.com).

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# The Changing Face of Contact Center KPIs

**Exploring new ways to better highlight the efficiency of operations**

*by Execs In The Know*

Running a contact center successfully requires knowing where you stand against performance targets. How else would you know where you are winning and where you are losing? Great customer experience (CX) leaders know that key performance indicators (KPIs) run the world at work! We need them to keep score! Leaders have many metrics that serve as KPIs to provide critical insights to operations. We always want to get better, so we need to know and understand our current performance as well as our strengths and opportunities. Many of the standard metrics focus on cost, productivity, quality – all highlighting the efficiency of operations.

Although cost-focused metrics are important, many companies now see brand representation

and revenue generation – instead of or in addition to cost reduction – as part of the contact center mission. Many believe in CX as the great differentiator, and effectiveness metrics that are more focused on overall experience and revenue generation have moved to the forefront for some leading brands.

In addition, dramatic shifts in the way we work, as well as changing customer expectations, are causing leaders to take a hard look at KPIs and measure success in new and/or expanded ways. Employee experience (EX) is center stage, and measuring how employees feel is more important than ever. Let's examine some emerging metrics and get you thinking about your scorecard to ensure it is aligned with your CX mission and

leading trends for both customers and employees. Although these may not be new metrics, they are measures that are gaining relevance and popularity in today's environment.

## Trending Customer Metrics

Customer metrics can help us understand our performance from the outside in. These measures reveal how customers perceive their experience and can offer insight into their future intentions. Customer feedback is a gift that often shines a light on the path to improvement. In addition to understanding how customers feel about their experience, many organizations are looking at the success of these interactions in a timelier manner.

Let's consider resolution and satisfaction. Forrester predicts that ["contact centers with a myopic goal of cost reduction risk high turnover, demoralized agents, and poor customer interactions."](#)<sup>1</sup> They see a shift from agent-owned efficiency metrics to a focus

on resolution and customer satisfaction. CX leaders that incentivize agents to pay more attention to effectiveness measures often see an increase in these important customer metrics. Looking at how well customer issues are resolved in combination with how satisfied customers are is a great overall indicator of customer success, and should be more widely adopted.

Another important and often underused metric is customer effort score. Measuring how easy or difficult getting an issue resolved or a question answered is gaining popularity on contact center scorecards. Gartner believes that ["customer effort is the strongest driver of customer loyalty – or disloyalty."](#)<sup>2</sup> Although increasing loyalty is a good thing, perhaps a bigger opportunity is keeping customers from becoming disloyal. Many believe effort is an indicator of a customer's future actions, and tracking this metric can lead to increased spend. When combined with other KPIs, such as repeat contacts and transfers, organizations can identify high-



effort journeys and take steps to improve these experiences.

Technology is also helping organizations uncover journeys that are less than satisfying to customers, and real-time sentiment analysis and response is a great example of this. Companies are using artificial intelligence-based tools to measure the emotional journey in real-time, identifying and extracting subjective information from calls, chats, and social channels to flag poor interactions and offer on-the-spot responses. After pinpointing the exact issue, these tools can offer ways to improve the interaction, either from the customer's perspective, the agent's perspective, or both. For example, when a customer has an angry voice tone, the tool can detect it and offer the agent anger-diffusion techniques in real time to change the trajectory of the interaction. Sharing this insight with agents and prompting them with ways to capitalize on the positive and right the negative can improve the CX.

### Enhancing Employee Metrics

Speaking of employees, several newer metrics that help improve the employee experience are gaining traction on scorecards. Employee KPIs are equally as important to the business and should be considered, particularly in light of the challenging labor market and staffing obstacles. These KPIs can help make agents happier and stabilize turnover, which is perhaps the biggest threat to many contact centers.

Much like customer effort, employee effort is an important metric to track, understand, and act on. This measure is a customized metric that complements the customer effort score. It measures how difficult it is for employees to conduct key tasks related to doing their jobs well, particularly tasks that are performed again and again. Tracking employee effort can reveal opportunities to improve process, training, and/or technology. This measure can be an excellent indicator of employee satisfaction and loyalty,



which may be more important than ever in the current environment.

Akin to the customer sentiment metric but pointed inward, real-time sentiment analysis and response for employees is increasingly important. Technology can also measure how agents feel during contacts. When showing signs of frustration, anger, or uncertainty, a trigger alerts supervisors to intervene with motivation or help for the agent. Imagine the impact of a real-time support network for agents, as well as customers interacting with the employee in need.

Another metric that is increasingly pointed inward is Net Promoter Score (NPS), called eNPS for employees. Like its customer equivalent, this metric measures likelihood to recommend. One school of thought is to keep it sharp with the standard NPS question customized for employees: "How likely are you to recommend this company to a friend or family as a place to work?" Many believe the classic "likelihood to recommend" question is the best predictor of retention. But, according to Bain, a second question can yield even more information as the best predictor of energy, enthusiasm, and creativity. The second question is typically a variant: "Please indicate your level of agreement

with the statement, '[My job inspires me](#)'.<sup>3</sup> With so much pressure on employee experience and retention, this metric is one to strongly consider adding to your scorecard.

Finally, as organizations look for additional ways to grow the business and generate new revenue, contact centers are an important part of that strategy. To measure the effectiveness of this, revenue per interaction is a key metric that aligns with the revenue-generating function. This KPI attaches a quantifiable measure to employee behavior of selling during a contact. It can be tracked at the center, team, and individual levels with ample opportunities for gamification and incentives, making it doubly rewarding for the agents.

## Updating your scorecard

Our dynamic environment should prompt you to take a fresh look at your KPIs. CX leaders need to realize the importance of adopting metrics that measure progress toward delivering on the strategic mission. Is your organization tracking metrics that help you understand if interactions are effective at bringing the brand promise to life, humanizing interactions, increasing revenue, and improving employee experience and retention? If not, spend some time determining how you can change this.

And don't be intimidated by the prospect of change. When looking to revamp KPIs, many organizations struggle with having perfect data and reporting capabilities. But starting with what you have and working toward the ideal should be a considered path. Create a team to help define the calculation and reporting based on what's available as a starting point. Then identify ways to work toward a refined calculation over time. Starting with what you have is a good start!

Tracking CX and EX metrics is the best way to understand how your operations are performing and where there is a need for



focused improvement, particularly when you create a balanced scorecard of efficiency and effectiveness measures. The world has changed dramatically, as have customer, employee, and business expectations. Taking the time to educate yourself, analyze existing KPIs, and look for opportunities to add metrics that paint a more well-rounded picture of operations is time well spent. A refreshed suite of KPIs can help modernize your operations and offer more value to the business, while also improving the experience of your customers and employees. 🧩

## Links:

- 1 [https://learning.callminer.com/c/whitepaper-forrester-megatrends-2022?x=CFI8z6&lx=amFxJO&utm\\_campaign=search-us&utm\\_source=adwords&utm\\_medium=ppc&utm\\_content=customer-service-megatrends-2022&ad=597030842131&device=c&matchtype=b&utm\\_term=call%20sentiment%20analysis&gclid=CjwKC-Ajw46CVBhB1EiwAgy6M4lbgo1mDG18PtETVUeaGoE-yYtyfbNLIRZrCtkUY9c7dGGL6o0kZoxoC3HQQAvD\\_BwE](https://learning.callminer.com/c/whitepaper-forrester-megatrends-2022?x=CFI8z6&lx=amFxJO&utm_campaign=search-us&utm_source=adwords&utm_medium=ppc&utm_content=customer-service-megatrends-2022&ad=597030842131&device=c&matchtype=b&utm_term=call%20sentiment%20analysis&gclid=CjwKC-Ajw46CVBhB1EiwAgy6M4lbgo1mDG18PtETVUeaGoE-yYtyfbNLIRZrCtkUY9c7dGGL6o0kZoxoC3HQQAvD_BwE)
- 2 <https://www.gartner.com/smarterwithgartner/unveiling-the-new-and-improved-customer-effort-score>
- 3 <https://www.netpromotersystem.com/about/employee-nps/>



# Keeping Your Workforce Mentally Healthy

Working to create a healthier, happier workforce

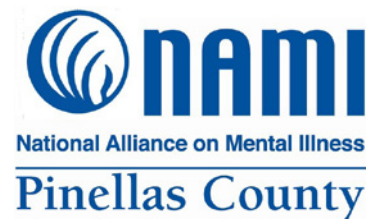


**Denise Bjurholm** is the Executive Director of the Pinellas County Chapter of NAMI and a tireless champion of NAMI's mission.

## Mental Health Today

Mental health is our emotional, psychological, and social well-being and affects how we think, feel, and act in all facets of our lives<sup>1</sup>. Many factors contribute to our mental health wellness. For example, changes in global health, society, and geopolitics during the past two years have upended lives and changed the way we live and work, exacerbating stress and increasing pressure on our mental health. This unpredictable and unprecedented change has negatively impacted the mental health of our employees – particularly customer-facing workers – and requires our attention.

Execs In The Know recognizes the importance of this topic in our society and industry. To help us learn more, we sat down with our friend, Denise Bjurholm, Executive Director of the Pinellas County Chapter of the [National Alliance on Mental Illness \(NAMI\)](#)<sup>2</sup>. She shared [some important information](#)<sup>3</sup> about the organization, trends, and actions companies can take to improve mental health wellness.



We've thought a lot about our conversation with Denise, and many of her insights have served as a springboard for this article and further exploration of the topic.

Our hope is to bring awareness to the broad spectrum of mental health conditions and help end the stigma so often associated with this weighty topic. We are committed to taking a closer look at the impact of recent disruptions on the Customer Experience (CX) workforce and identifying ways to improve mental health wellness.

### Important Workplace Trends

By their nature, customer-facing jobs are stressful. Customer Service Representatives (CSRs) interact with customers that have timely problems to solve, important issues to be resolved, and burning questions to be answered. Customers rarely reach out to share positive sentiments or good news about a product or service they purchased from a brand. Instead, CSRs are bombarded with customers who need help in interactions that happen over and over, day after day. This line of work can be



stress-inducing and difficult. Add this reality to the life-changing challenges of the past couple of years to see that customer-facing employees are really being put to the test.

After months of working remotely, businesses are pivoting, and requiring employees to return

to the office, or at least partake in a hybrid model that requires workers to be in the office on a regular schedule. [This return to the office is creating a new set of stressors, including uncertainty about changes in the day-to-day activities of the role, insecurity about job retention, and pressure to keep up with family duties and outside responsibilities while in the workplace](#)<sup>4</sup>.

While the work pressure of interacting with



customers and dealing with their problems can increase stress and exacerbate mental health issues, these new stressors further impact the entire employee experience. This trend is taking a toll on employee engagement, behavior, attitudes, and productivity, particularly in dynamic work environments where employees are measured regularly and frequently on performance standards.

### Positive Responses to Current Trends Corporate Actions

Many believe that companies have the opportunity and responsibility to add or increase focus on the mental health of their workers, particularly given recent disruptions. But knowing where to start to shore up this support can be a challenge.

A great first step is to examine the support programs your organization offers to assess the existing resources. Partner with your Human Resources (HR) team to understand the programs your organization has in place to help employees with their mental health well-being. Does the program include proactive educational opportunities? Is there enough internal communication and marketing of these

Illness (NAMI), to stay abreast of the latest trends and resources.

- Work with HR to ensure that the company is actively prioritizing mental health wellness. Investigate additional educational opportunities, schedule flexibility and mental health days as part of the paid-time-off benefit. Propose ways to fill in the gaps in the existing resource offerings, if needed.

### Individual Actions

In addition to the programs your company offers, it is important to know what you can do as an individual. The number-one thing you can do is start the conversation about mental health wellness with your teams. Having regular check-in conversations that focus on how the employee is feeling and doing is a great way to begin. This conversation can start by simply asking, "How are you doing?" and letting it develop from there. You should consider a having a discussion focused on the employee (and not the work) from time to time; this could be a scheduled monthly conversation or impromptu if you see changes or struggles from an employee.

And don't stop there! Here are some ideas to consider that will make a longer-term impact on your own mental health wellness:

- Be open to conversations about how you are doing and be honest in sharing the way you feel.
- Take advantage of the programs your company offers and participate to increase your knowledge and strengthen your own mental health.
- Ask for help when you feel you need it; the programs you have access to are there for a reason, and that reason is to help you if and when the need arises.
- Help others. Offer an ear to listen and



available resources? Are employees using these programs? In addition, include a good look at the Employee Assistance Program to ensure you understand what it offers and how it can help you and your team.

Once you have a good idea of what's offered in your workplace, there may be opportunity for your company to expand its support of mental health wellness. Some ideas to consider:

- Be a champion for the cause and continue to educate yourself on the issue.
- Create a mandate to focus on mental health wellness and have conversations with your team about the importance of it. Ensure everyone knows how to talk about mental health wellness and understands the available resources.
- Consider partnering with outside experts, such as the National Alliance on Mental



## Execs In The Know Supports the National Alliance for Mental Illness

National Alliance on Mental Illness (NAMI) is the nation's largest grassroots mental health organization dedicated to building better lives for the millions of Americans affected by mental illness. We support the StigmaFree campaign, which is NAMI's effort to end stigma and create hope for those affected by mental illness. A supportive company can take on the responsibility for employee mental health well-being through education, acceptance, and advocacy. Learn more on NAMI's website.

suggest resources that your colleagues can connect with for information and help. In the process of working with others, we frequently are helping ourselves, too.

- Expand your focus beyond the workplace and apply what you are learning and doing in other areas of your life. Mental health wellness reaches all aspects of our lives.

### The Benefits of Mental Health Wellness

We believe that a healthier workforce is a happier workforce, but the benefits of improving mental health well-being go far beyond that. Supportive, stigma-free companies that make mental health a priority and invest in programs to strengthen employee well-being benefit in several other ways.

One outstanding advantage is that healthier employees deliver better results. They likely bring a more positive attitude and set of behaviors to the workplace. This mindset, in turn, makes them stronger individual

contributors and team members. Their attendance and productivity are likely higher and their performance better. Additionally, companies enjoy higher employee satisfaction and retention as well as an improved ability to attract new employees that regard mental health wellness as a priority. With healthier and higher-performing teams, organizations can get closer to fulfilling the CX mission: increased customer happiness, loyalty, and spend.

Individuals who prioritize their own mental health wellness also see rewards in the presence

Companies enjoy higher employee retention...and attract new employees that regard mental health wellness as a priority.

**Denise Bjurholm**  
NAMI



of positive life attributes. In addition to having a healthier work life where they have access to supportive programs and generally perform better, their attitudes and behaviors outside of work are improved. More important is that they feel better about themselves and their ability to adjust to changing life events. Having the tools to stay mentally healthy can help people cope with change, be more resilient to stressors and setbacks, and have more meaningful relationships in all facets of life. Mentally healthy people know when to seek help and recognize that as a sign of strength, not weakness.

### Start Making a Difference Today

Mental health wellness is an important and prevailing issue in society. Understanding and acting on this for your organization and you

are key to improving mental health wellbeing, particularly for stressful customer-facing roles in our dynamic industry. Working together to educate, accept, support, and act will reap benefits for ourselves, our employees, our business, and our customers. Want an easy way to get started? Begin the conversation with your team and invest the time to understand the support your organization offers.

We are grateful for NAMI's work and encourage you to get involved in this essential issue. We hope you will find your [local chapter or affiliate](#)<sup>5</sup> and start learning more today! You can also learn more about Execs In The Know's commitment to this important topic and how to get more involved yourself by visiting our [Leading with Impact webpage](#)<sup>6</sup>. 🌟

#### Links:

- 1 <https://www.mentalhealth.gov/basics/what-is-mental-health>
- 2 <https://www.nami.org/Home>
- 3 <https://execsintheknow.com/blog/mental-health-in-cx-a-discussion-with-nami/>
- 4 <https://execsintheknow.com/blog/mental-health-in-cx-a-discussion-with-nami/>
- 5 <https://www.nami.org/Home>
- 6 <https://execsintheknow.com/about-us/leading-with-impact/stigma-free-initiative/>

Start the conversation! NAMI encourages conversations about the importance of mentally healthy employees and programs that support mental well-being.

**Denise Bjurholm**  
NAMI



# Agents, Analytics and AI in the Era of CX

## Creating operational efficiency and business agility

*by Oded Karev, General Manager of Advanced Process Automation, NICE*

There comes a point at which you've got to acknowledge that a long-accepted way of doing things is being upended. This can be due to advances in technology or changes in society or both.

That's precisely where we are in the world of customer service and support. But, it is not manifesting as a move from one stable paradigm to another. Instead, we are seeing the creation of a highly dynamic environment with continuous change as a built-in aspect.

## **There is No Longer a Single "New Normal"**

The accelerated transition to more remote and hybrid workforces is posing challenges for accessibility, agent engagement, and service consistency. This in turn is driving a shift to more digital-first approaches to interactions, both in-house and with customers.

However, the move to systems and applications that support those developments is often uneven or lags behind the actual needs of the organization. Enterprises may have thousands of processes across various organizational divisions such as HR, finance, IT, contact centers,

and the back office. Most of them are still executed manually today with multiple business applications, creating a complex patchwork of siloed or outdated solutions and highly decentralized data.

Imagine customer support representatives in a typical contact center. They very often need to be experts in legacy desktop applications and web-based services, access and duplicate information in separate databases, and handle live interactions in what is quickly becoming an omnichannel industry. Add to this the costs of compliance with ever-changing data management regulations and standards, which can be very different across regions and in different business sectors. Getting approvals, processing requests and generally supporting customers seem to have become more time-consuming and challenging.

And that poses an additional problem, as customer expectations have changed. They expect excellence and personalization from every interaction, with response time playing a critical role in their assessment of service providers. As [an article by Sarika Khanna in the January issue of CX Insight Magazine](#)<sup>1</sup> notes, “both U.S. and U.K. consumers ranked response time as what matters most to them when contacting customer service. This was ahead of agent knowledge about products and services, overall time and effort needed to resolve an issue, personalized communication and resolution and, finally, agent tone and communication style.”

Informed customers are demanding higher quality services and, as is always the case, they are letting others know what they think. Word-of-mouth remains the number-one marketing tool and social media is just a more powerful, faster-paced vehicle for its spread. Fortunately, technology has made customer experience more easily quantifiable, but it has also created fierce competition in that arena.

Between the high expectations of customers

and the rapid pace of technological change, it is clear we cannot continue to do what we have always done. It will not be sustainable.

## The Key to it All: People

What is needed now is both operational efficiency and business agility. This includes looking at how workflows impact CX, optimizing interactions, making in-house collaboration easier, and digitization of business process inputs such as invoices, contracts and even signatures.

The common theme is efficiency, as it can make or break a customer’s experience. So, we adjust our processes and upgrade what we have to offer. But we soon find that superb systems, world-beating tech and cutting-edge design are just not enough.

As Khanna noted in her CX Insight article, “customer service plays a major role in modern customers’ buying decisions and, in 2022, the role of the customer service agent is only going to grow in importance.” And the connection between employee satisfaction and customer experience is very well established across many studies. As noted in [this Forbes article](#)<sup>2</sup>, “companies that invest in employee experience are four times more profitable than those that don’t” and “companies with highly engaged employees outperform their competitors by 147%.”

At NICE, we, too, have repeatedly seen the real-world impact of employee experience on customer satisfaction metrics. A few examples:

- Orange Poland automated complex processes across the front and back office, allowing employees to find greater satisfaction from more valuable tasks and the elimination of human error. This optimized business processes by up to 80%, reduced handle times by 50%, and reduced costs by 45%.
- Telia Finland Oyj saw a 30%-50% reduction



in AHT, an increase in contact center productivity and significant improvement in customer satisfaction after implementing automations focused on empowering agents with real-time customer data summaries, compliance guidelines and best practices. To further ensure satisfaction with the outcome, employees were deeply involved in development of the use cases.

In short, employees need to feel engaged, empowered and equipped to deliver exceptional customer experiences. If they don't, then we're undermining the foundation of our own success.

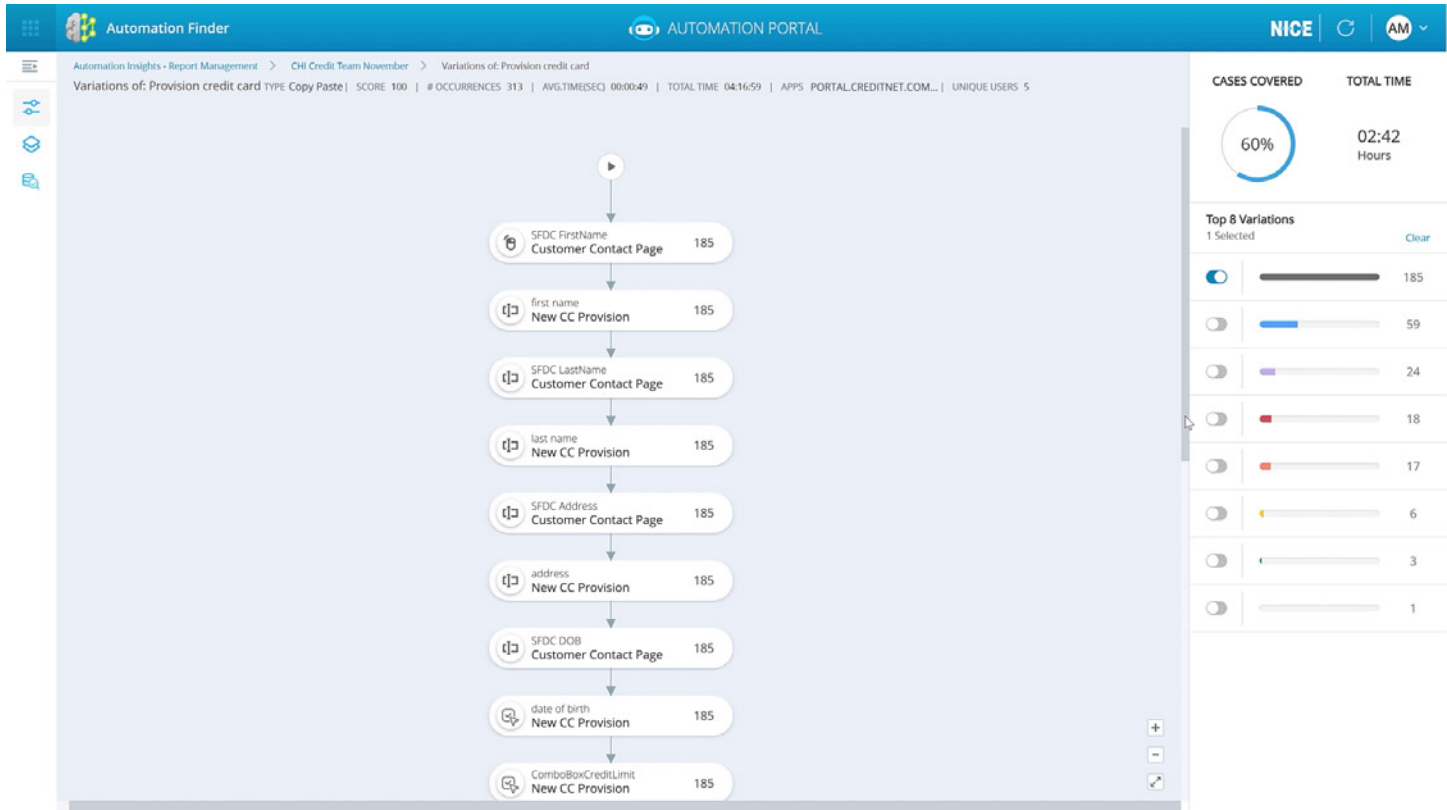
## How to Free Employees of Their Worries

So, if people really are at the heart of customer service, then it is important to look at what is most likely to trouble our employees. The main

sources of their stress can be loosely divided into three areas: errors, performance, and monotony.

They are worried about the inevitable human errors inherent in manual processes and their impact on business outcomes, which includes regulatory compliance. As a result, employees may find themselves double- and triple-checking their manual input. At the same time, employees want to hit performance goals in terms of number of transactions completed and other KPIs (such as upselling, churn, AHT, and more). In addition, they have the burden of routine, mind-numbing and repetitive tasks for administrative purposes and ensuring database consistency.

The more their job causes them frustration, the less employees are motivated to do it well and, in turn, the higher our operational costs and the lower our customer satisfaction ratings.



One very effective tool for improving compliance, efficiency and accuracy is automation. Applied correctly, it frees employees from mundane, monotonous tasks and eliminates procedural errors, helping them meet KPI goals and allowing them to focus on higher value responsibilities.

In 2018, a report titled *The Sorry State of Digital Transformation* by the global market research company Forrester revealed that up to 22 percent of businesses did not have process excellence and workflow automations in place. While that may have changed over the last few years, especially in light of the pandemic-induced mass migration to remote workforces and cloud services, [automation is still not being implemented to its full potential](#)<sup>3</sup>.

## An Intelligent Approach to Automation

Many organizations think about automation in terms of where it can replace human employees. But this mindset is entirely missing the opportunity created by RPA solutions to empower employees, meet and exceed KPIs, and prevent churn among the most valuable employees.

In order to empower our employees, we need to know where their challenges lie, how automation can best support them, and if there are organizational inefficiencies that can be addressed. This crucial step of assessing workflows and processes can also help us identify best practices that can be proliferated across our enterprise, as needed.

Of course, automation may not be the right strategy in every scenario. Not all processes can be effectively automated, and there is a cost of unnecessarily undertaking the effort. Obviously, the best processes to automate are those which would generate the highest ROI for the business. For example, processes which are complex and executed by a large group of people are good candidates for automation. Another example is a seasonal process that is very error-prone when done manually. On the other hand, highly complex but infrequent, processes requiring cognitive decisioning over a lengthy handle time are generally not ideal candidates for automation.

No matter the process, though, it should be analyzed for potential optimization before implementing any automation. Without this step, the result may just be an automated version of an existing inefficiency or the unintended creation of workflow bottlenecks.

In order to most effectively assess which processes can be automated, with how much effort, and what their potential impact would be, we turn to artificial intelligence. An AI-driven analysis of our business processes can provide the actionable insights needed to guide our decisions regarding next steps toward automation and optimization, as well as possible non-automation-dependent improvements.

As we move to implement the identified automations and optimizations, we should prioritize those that will have the greatest impact. Such a strategy gives us quick wins with which to rapidly proceed along a digital transformation trajectory. In addition, based on the insights AI provides us, we can further empower our employees with new coaching plans, better process guidance and skill boosts built around the RPA solutions.



## What Happens Next

At NICE, we have seen how RPA impacts businesses of all sizes. For example, on average, they registered:

- 100% elimination of errors and 100% data accuracy
- First-contact resolution up by 10-30%
- Handle times down by 50%
- Customer satisfaction up by 10-20%
- Training time down by 12-20%
- Sales-in-service calls up by 20%
- Increased compliance and process adherence
- Increased employee engagement
- Increased process and service standardization
- Cost savings equivalent to 40 FTEs.

One final point. Once we've created a digital environment for our employees with streamlined processes and built-in automations, a new enterprise-level advantage arises. We can now quickly and easily leverage the automations in place to scale our workforce up or down, as needed, in response to growing demand or seasonal requirements. What started as a fantastic solution to keep our employees happy is ultimately a doorway to bigger and better things, no matter how complex our new world of customer service seems to be.

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



**Oded Karev**  
General Manager of  
Advanced Process  
Automation  
NICE

Oded is a seasoned professional in the strategy and operations domain specializing in customer journey optimization and digital transformation. He is the General Manager of NICE's Advanced Process Automation LoB, for NICE's robotics solutions globally. NICE is an RPA leader, bringing a portfolio that spans across attended and unattended bots, including a proprietary task mining solution, and owning the largest automation projects in the industry.



### Links:

- 1 <https://execsintheknow.com/magazines/january-2022-issue/the-top-five-customer-service-trends-for-2022/>
- 2 <https://www.forbes.com/sites/blakemorgan/2018/02/23/the-un-ignorable-link-between-employee-experience-and-customer-experience/?sh=6fe7ec6948dc>
- 3 <https://www.forbes.com/sites/forbestechcouncil/2022/02/23/2022-predictions-the-next-wave-of-enterprise-automation/?sh=7048313b488d>

## KIA ONLINE COMMUNITY MEMBER SPOTLIGHT



### **DANIEL MCFADDEN** DIRECTOR OF CUSTOMER SUPPORT

Daniel has been with PAR, a leading publisher of psychological assessment materials, for more than 21 years, where he began his career as a Customer Support Specialist I, then led the Technical Support department. Today, as the

Director of Customer Support, Daniel is responsible for ensuring that PAR provides unparalleled Customer Service and Technical Support for all the products they sell. His team works to answer every call live, with a goal of delighting every customer in each interaction. Daniel is also an internal Product Champion for PARiConnect, responsible for gathering customer feedback and providing recommendations for improvements and delivering monthly webinars. He has a bachelor's degree in Psychology and an MBA from the University of South Florida.

In mid-June, we had a chance to catch up with Daniel and ask him about his career, about PAR, and about his experiences within the Execs In The Know community.

## Customer Support as a Business Application of Psychology

**EXECS IN THE KNOW (EITK):** Daniel, your entire career has been focused on customer support. Can you talk about what drew you to this career path initially and what has kept you so engaged?

**DANIEL MCFADDEN:** I have always been fascinated by the study of the human mind and behavior. My bachelor's degree was in Psychology, and I fully intended to go for a PhD in Industrial/Organizational Psychology, but I wanted to take a year or two off as a break from school.

There aren't exactly a ton of job options for someone with a bachelor's degree in Psychology, but I discovered PAR, which specifically targeted Psychology graduates for entry-level customer support positions. I thought I'd work for a couple years, then go back and get my Doctorate.

Once I started at PAR, I just loved the people and the culture. I instantly recognized it as an organization that truly cared about its employees and would give talented and ambitious people



opportunities. In many ways, I've come to view customer support as a business application of Psychology. What makes a customer happy or unhappy? What motivates your team members to give their all? That's all Psychology, and all of it fascinates me!

**EITK: Not only did your career start in customer support, it also started with PAR. Can you share a little bit about your role with the company, how it's evolved over the years, and provide some insight into the culture, especially as it applies to customer service?**

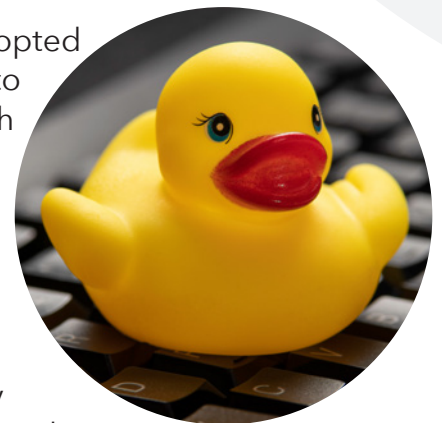
**DANIEL:** Sure. As I mentioned, I started out in our entry level Customer Support position. Over the years, I was promoted to various positions in our Customer Support Team, including Senior Technical Support Specialist. In 2015, I took over as the Manager of our Support team. My current role as Director of Customer Support is oversight of our customer experience, including serving as an internal Champion of our online assessment platform, PARiConnect.

The culture at PAR is really all about working as a team and helping others. In 2021, we completed an ERP system implementation.

And, while it was one of the most challenging projects I've ever been a part of, every single person on the team was solely focused on working together and solving problems. We are also big on giving back to the community through volunteer events and fundraisers. Our commitment to the community starts at the very top, with the company leadership dedicating significant amounts of their own time and money. Every year, we do a United Way Week event designed to raise money and awareness of the people in our community who need help. Not only is it for a great cause, it's also a fantastic team-building event that everyone looks forward to!

**EITK: PAR is committed to providing the absolute best Customer Service to its customers, and this is enshrined in one of the Customer Support department's special mottos: Be a Duck! Can you share what this motto means to you?**

**DANIEL:** Yes! We adopted the "Be a Duck" motto because even though we're working our tails off, we want it to look effortless to customers. Ducks seem calm as they glide through water, but underneath, they are paddling furiously. This attitude – to do whatever it takes to make our customers happy – is shared by everyone at PAR. We've got a huge collection of rubber ducks in the CS department, as people have started giving us unique ones when they find them!



We really try to cut away as much red tape as possible and just focus on giving the customers what they need. It's never easy, and requires a lot of training before our new team members

are ready to contribute. However, it pays off with our customer satisfaction numbers, which are consistently world-class.

**EITK: Agent experience is just as critical as customer experience. In your experience, what does a great agent experience look like, and what are the most important things to get right?**

**DANIEL:** First and foremost, I think it's about finding the right fit between the person and the role. It doesn't matter how well you treat your employees if they're not a good fit for the role and don't enjoy working with your customers. Beyond that, we believe strongly in empowering our frontline staff to make decisions. I worked the frontline roles every day for the first 15 years of my career, so I know how frustrating it can be to have a customer who needs help but you're not able to help them. Having an upset customer and having to always ask for permission to fix their issue (or worse, always escalating those calls to someone else) is so deflating. That's why our entire staff is empowered (within reason) to do whatever is necessary to make the customer happy.

Once you get past that, I think good communication is crucial. What are your expectations for your team? What is coming down the road that impacts them? What do they need to know to help the customer? Put good people in a position to succeed, and they will. If you're not giving them enough information, you

aren't putting them in a position to succeed.

Lastly, I think you have to find creative ways to recognize and encourage exceptional work. One way we do this is through our customer feedback tool. Each week at our team meeting, I pull in the top three or four new customer quotes regarding one of our team members, then I have the team vote (names removed to make the voting anonymous) on the "best" quote, with the winner receiving a gift card.

There's something very powerful about seeing customer feedback in their own words rather than just summary data.

We have a lot of exceptional people, and they deserve to know how exceptional they are.

**THE KIA  
COMMUNITY HAS  
BEEN AMAZING  
...allowing for open and  
honest discussion between  
thought leaders in all  
types of industries.**

**EITK: Like many companies, PAR has recently made the shift from 100% work-from-home to a hybrid model. Can you share what that transition has been like ... in which ways is it working well, and in which ways could it work better?**

**DANIEL:** I think we've found a very solid balance with our current hybrid model. We allow everyone up to two days a week work-from-home (WFH), and then three days in-office. We stagger those days so that we always have some staff in the office, and everyone is required to join on Thursdays, which is when we have our weekly team meeting. This provides the benefits of working from home (Hello, gym shorts and pets!) while allowing us to build strong relationships and trust. It also helps to ensure that our people really get to experience the PAR culture, which is all about



the fantastic individuals we have working here. Being connected to that culture and the people helps us dramatically limit turnover. Our average tenure in customer support is over 10 years, and that's after we lost several team members in the last year.

As far as how it could be better, I think the real question will be, how WFH evolves in the future. As companies move further into WFH, how will that impact culture and relationships? Trust is crucial, and that's more difficult (but not impossible) to build when you never interact with someone in person.

**EITK: When you're not immersed in creating a better experience for PAR customers and customer service agents, what are some of your personal interests and passions?**

**DANIEL:** I love to travel. I love meeting new people, experiencing new cultures and new foods. I've traveled all over Europe and have been to parts of Asia and South America. The pandemic obviously put a damper on that, but we've got a trip to Ireland and Scotland planned for later this year!

I'm a huge music lover, too, and enjoy going to concerts when I can. I enjoy movies and video games, really, anything that I'm able to connect



with emotionally or to use as a way to connect with friends. I'm also a craft beer nerd and love to visit new breweries when I travel.

**EITK: You became a member of the Know It All (KIA) Community earlier this year. You also attended your first Execs In The Know Customer Response Summit event in March. Can you talk about what the community has meant to you so far, and what the experience in Clearwater, FL was like?**

**DANIEL:** The KIA Community has been amazing so far. For years, I struggled to find effective ways to track industry trends, share and learn new ideas and approaches, etc. The KIA Community does exactly that, allowing for open and honest discussion between thought leaders in all types of industries.

The CRS event in Clearwater was fantastic. It was well organized and brought together a really fun and committed group of people. Everyone was there to share and connect with others, and I really learned a lot! 🌟



**Execs In The Know**

Thank you to Daniel McFadden, Director, Customer Support at PAR, for his leadership, participation, and insights. To connect with Daniel, 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.

**Want to learn more about the KIA online community? [CLICK HERE.....](https://bit.ly/aboutkia)**  
[bit.ly/aboutkia](https://bit.ly/aboutkia)



**Interested in taking part in a future Brand Spotlight feature and sharing your story? [CLICK HERE.....](mailto:info@execsintheknow.com)**  
[info@execsintheknow.com](mailto:info@execsintheknow.com)



# THE PATH TO LEGENDARY CX

Together, we will draw **INSPIRATION** from community members, gain **INNOVATION** insights from our partners, and ignite our **IMAGINATION** to create legendary customer experiences.

Oct 24 - 26, 2022



Execs In The Know

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CUSTOMER RESPONSE  
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Early bird pricing ends September 9th



# KIA THE “KNOW IT ALL” ONLINE COMMUNITY

## LEARN. SHARE. NETWORK. ENGAGE TO INNOVATE.

Now 700+ members strong, the Execs In The Know “KIA” (Know It All) online community is a proven, valuable resource and a necessary go-to for our customer experience (CX) executives for learning, sharing, networking, and engaging amongst their CX peers in a private setting.

KIA members, many representing some of the world’s top corporate brands, are collaborating through frank and unfiltered discussions on the private and exclusive “members only” CX discussion boards, tapping into the robust, content-rich “solutions marketplace,” and developing trusted relationships amongst their CX peers.

This first-of-its-kind online community also enables private “members only” peer-to-peer sharing of vendor insights. While vendors are not KIA members, participating vendors/partners do provide ungated content to the CX Marketplace allowing them to showcase their solutions and serve up content, but without the sales pitches.

96%

of the members say they feel comfortable reaching out to other community members for help.

87%

of the members say that community content and member input improved their quality of work.

### Key Features

- Robust peer-to-peer networking on your own time, from any place
- Thoughtful, niche CX discussions
- Access to a rich, robust library of content
- CX Marketplace solutions showcase
- Q&A’s with thought leaders
- Exclusive access to events and content
- Executive job board
- It doesn’t cost a thing and privacy is a priority

## YOU'VE GOT QUESTIONS. KIA HAS ANSWERS.

KIA is the perfect place to ask those niche questions that only other CX end users will understand and have the relevant advice and insights you're looking for. Ninety-six percent of the members say they feel comfortable reaching out to other community members for help.

## THERE'S AN APP FOR THAT

Take the KIA Community with you to the conference room, on the road, or wherever you need it. Connect with your fellow community members from wherever, whenever. Once a member, start taking advantage of the app today.

## MAKE SMARTER DECISIONS

Eighty-seven percent of the members say that community content and member input improved their quality of work. Find out what's being done successfully at other top brands to build strategies and make informed decisions.

## INSIDER INFO ON PROSPECTIVE VENDORS

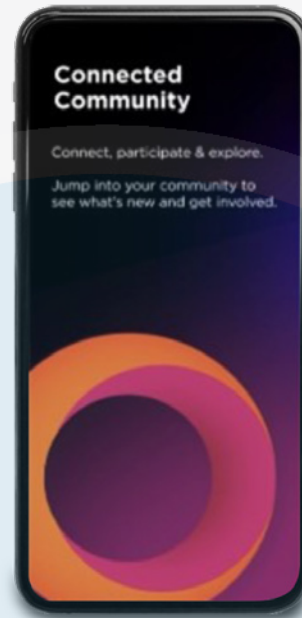
It can be hard for CX Leaders to cut through the clutter to find solutions that will truly help them achieve their organizational goals. Our CX Marketplace offers members-only access to an extensive library of downloadable materials plus valuable peer insights in a candid, no-pressure-to-buy environment.

## YOU'RE A VIP

When you're a KIA member, you will also have access to exclusive content and events, and discounts on live events. When you attend Customer Response Summit events, you can meet up with other KIA members at our exclusive VIP tables.

## KEEP THE CONVERSATION GOING

At our events, we frequently have more to talk about than time allows. Our online community facilitates ongoing discussion of the CX topics that matter most. Continue the conversation in our online KIA community.



- 1 Download the "Connected Community" mobile app on your mobile iOS or Android device.
- 2 Log in using our "community.execsintheknow.com" domain name.
- 3 Use your KIA login credentials to log in.

# JOIN US

We invite you to learn more about this complimentary community today.

### LEARN MORE

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

We'd love to have you! Please follow the link below to request to join our community.

### REQUEST TO JOIN

[https://www2.execsintheknow.com/join\\_our\\_CX\\_community](https://www2.execsintheknow.com/join_our_CX_community)

For help with questions, a demo of the community, or to get signed up on the spot.

### QUESTIONS?

Email Gina Morkel at [Gina@execsintheknow.com](mailto:Gina@execsintheknow.com)

Is your business interested in sponsorship opportunities in the CX Marketplace?

### BUSINESS PARTNERS

Email Scott Moberly at [Scott@execsintheknow.com](mailto:Scott@execsintheknow.com)



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