

CRS Summit

Trust Under Pressure Workshop

Closing the CX gaps that put customer
loyalty at risk.



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Coordinate *every* customer communication with CSG.

Make Money. Save Money. Build Equity.

40+
Years in Business

150+
Ecosystem Partners

300B+
Interactions
Managed Annually



900+
Clients
Worldwide

70%
Of US households
touched annually

 Microsoft
  CHASE
  Walgreens

 MassMutual
  Telstra
  COMCAST

CSG executes the mission critical moments every business depends on.

HEALTHCARE



eClinicalWorks



FINANCIAL SERVICES



DISCOVER



INSURANCE

MassMutual

PROGRESSIVE



TELECOMMUNICATIONS



RETAIL & TECHNOLOGY



Walgreens

GOVERNMENT



maximus



Where CX Often Breaks Down



Order & Service

Appointment & Service
Management

Order Management



Billing

Statement & Billing Explanation

Digital Payment Collection &
Reminders



Account Security

Authentication & Verification

Fraud Resolution



Customer Care

Service Updates & Resolution

Contact Center Optimizations



Promotions & Offers

Contextual Promotional Offers

Proactive & Reactive Retention
Offers

The Same Customer, Told Four Different Stories



Phone call

Its own system



Email

Its own inbox



Online portal

Its own records



In-person office

Its own notes

- One customer calls, emails, uses the app, and walks into an office — often for the same thing.
- Each channel usually has its own system, and no memory of the others.
- The customer feels one relationship; the business runs four disconnected ones.

Today's problem, and there's a better way — that's what this session is about.

Resolving an Issue Takes As Much or More Effort Than a Year Ago

74%

of customers say **resolving an issue takes the same amount or more effort** than it did a year ago.

32%

It takes more effort
(net)

42%

It takes about the
same amount

26%

It takes less effort
(net)

73%

**of customer journeys
involve more than one
channel.**

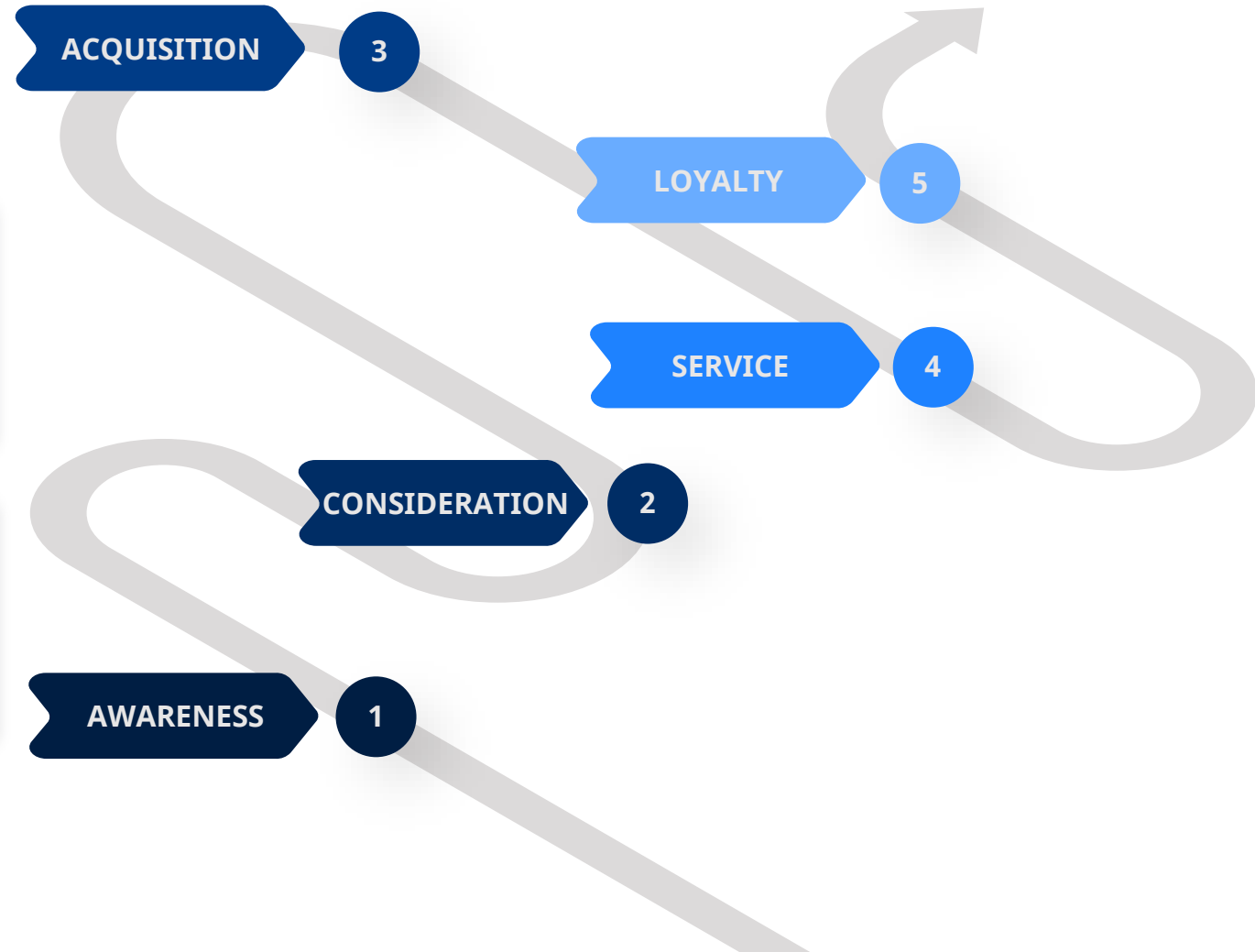
Customers get frustrated when every channel repeats the same message — or none of them agree with each other.



In plain terms: technology that watches what's actually happening across every channel in real time, and helps decide the single best next step for that person.

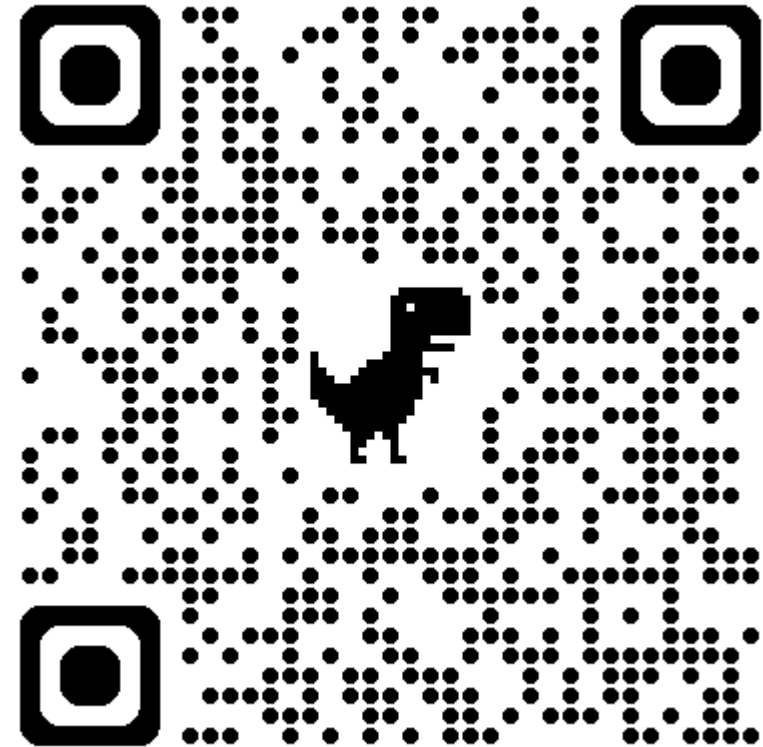
It sits on top of the systems your agency already runs — it directs them, it doesn't replace them.

A journey map is a picture of the journey. A contact center tool handles one channel. Orchestration connects them all.



Interactive RCS Demonstration

Experience single session
engagement that is Branded,
Private and Effective



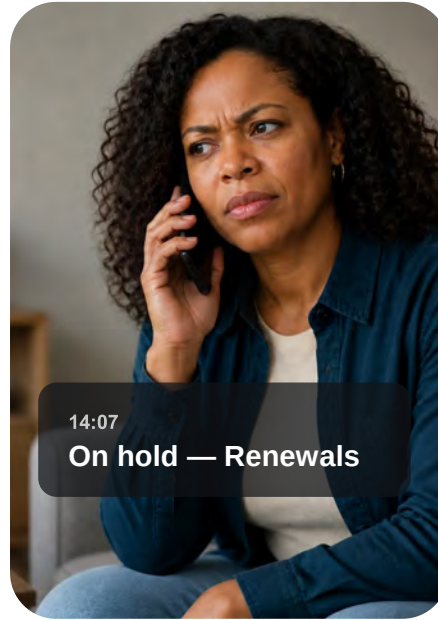
A missed notice turns a routine renewal into an avoidable service interaction.



1 Renewal notice arrives by mail and gets set aside.



2 The renewal deadline passes without action.



14:07
On hold — Renewals

3 The customer contacts support and waits for help.

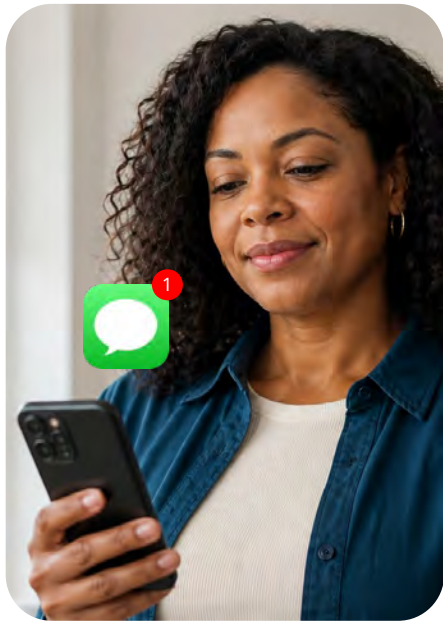


4 The customer completes the renewal through an assisted channel.

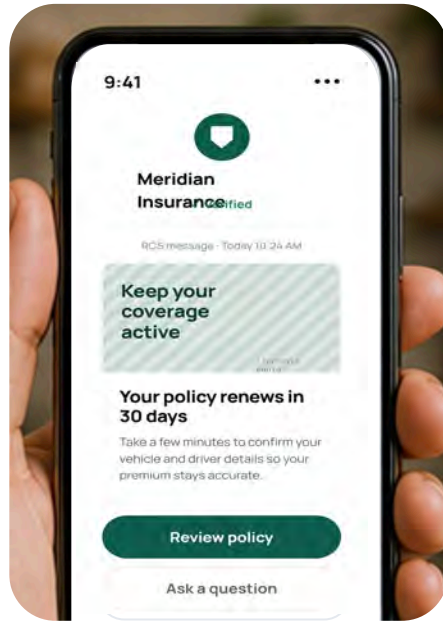
Hidden cost to serve

-  Print and postage spent on notices that go unread
-  Avoidable contacts fill the call center queue
-  Employee time goes to routine renewals that never needed a visit

A verified message with context turns a routine renewal into a simple-self service moment.



1 Verified reminder arrives before the deadline



2 Taps Renew now and confirms her details in the thread.



3 Pays and gets the confirmation in the same conversation.



4 The renewal is complete. No call or assisted service needed.

The payoff

- Customers renew self-service, on time
- Fewer calls and assisted interactions reduce cost to serve
- Delivery and response data enables smarter follow up

Unify signals, decisions, and channels to meet Customer need in real time.



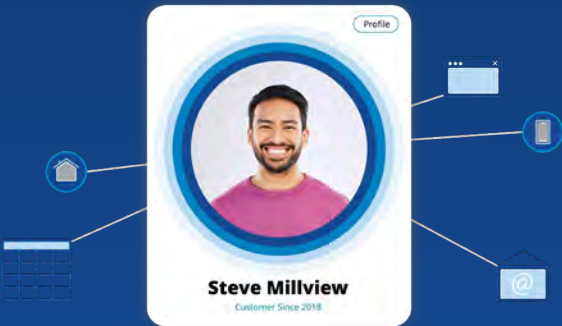
DETECT

Where broken experiences drive churn or cost



DECIDE

The next best action based using individual customer profiles



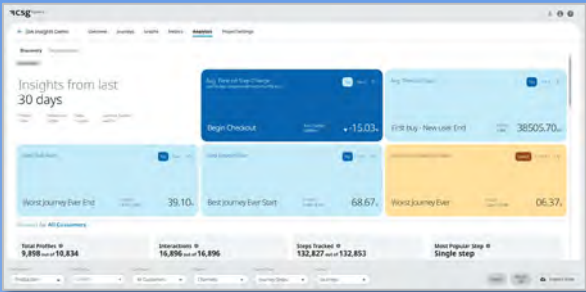
DELIVER

Mission-critical proactive messages to customers

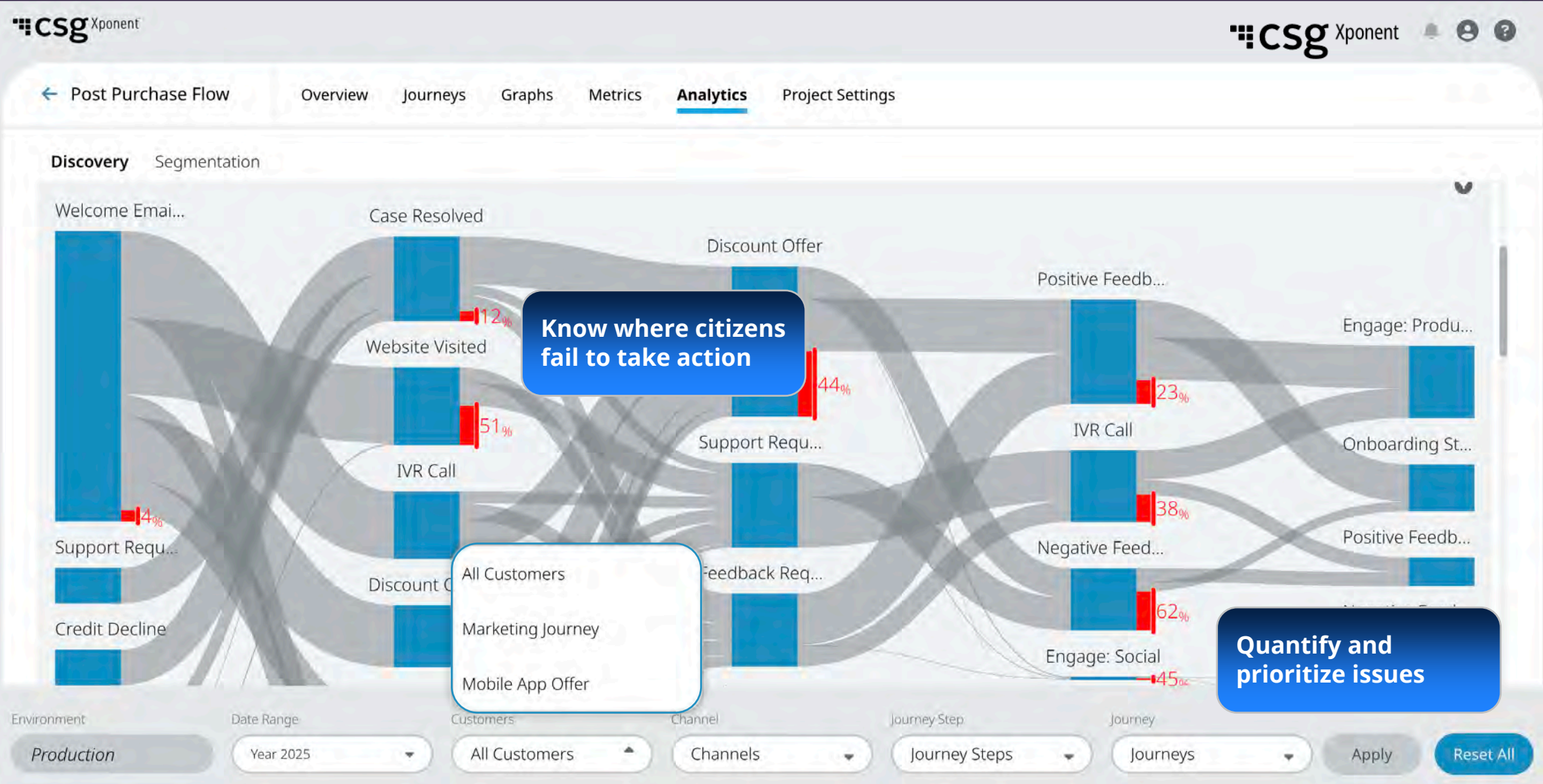


DRIVE

CX value with live metrics that tie to revenue, loyalty, and cost savings



Find Breaks in CX to Take Action



What if you could see the path to better CX?

Find What's Broken

Journey Discovery
Analytics



Simulate Resolution
to See Positive Impact

Journey Simulation



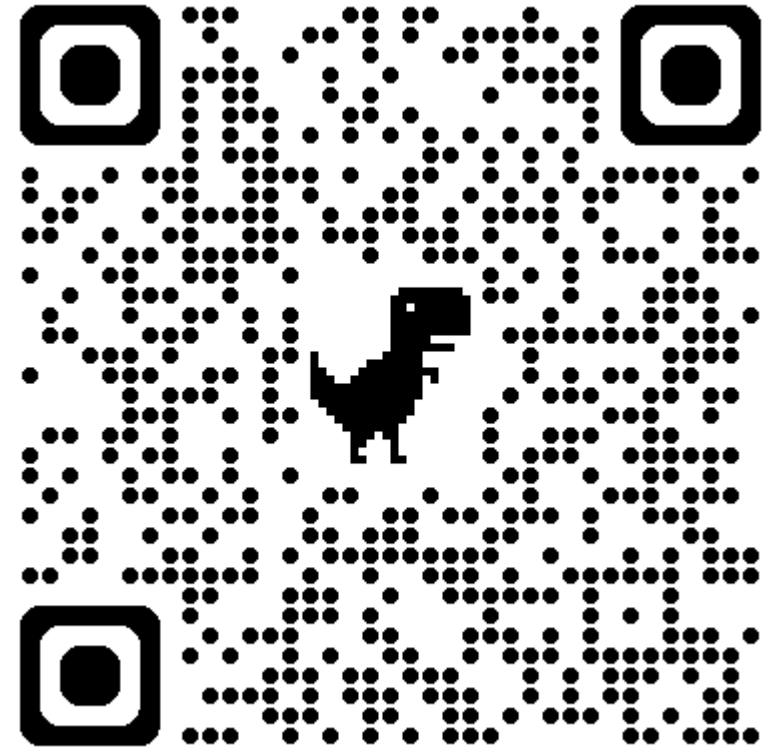
Orchestrate a Better
Experience in Real-time

Journey Orchestration

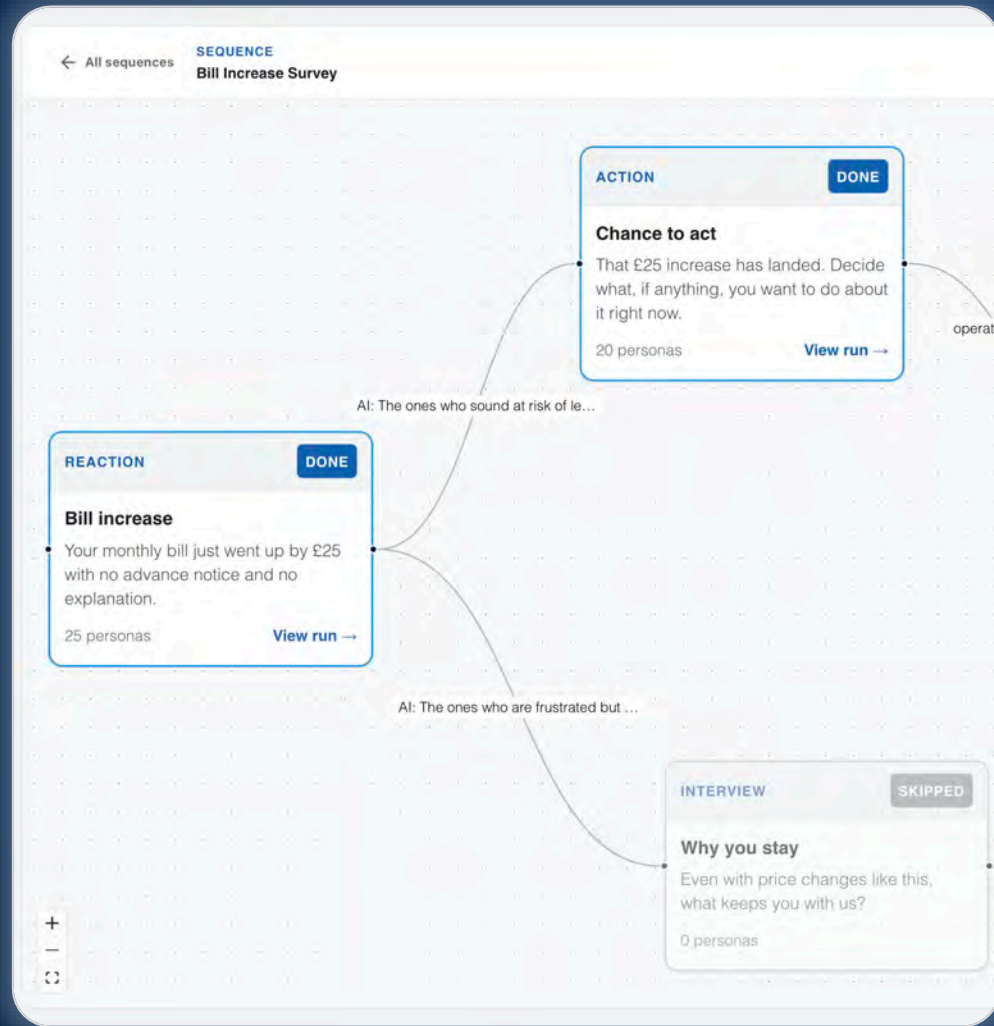


Interactive RCS Demonstration

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Journey Simulation Demo



Simulate using reality-based digital customers before you ship

AI-agent powered journey simulation, using a digital version of your real-world customers.

PERSONA
Louis Jackson

Profile
AGE: 45-54 | LOCATION: Elliotborough, SV
Price-Conscious Premium Negotiators: 30%

Contact
EMAIL: louis.jackson.79@xample.com
PHONE: +441144960699

What matters to them
PREFERS SMS | WANTS: Value seeking

GOALS
• Review renewal options
• Maintain service relationship

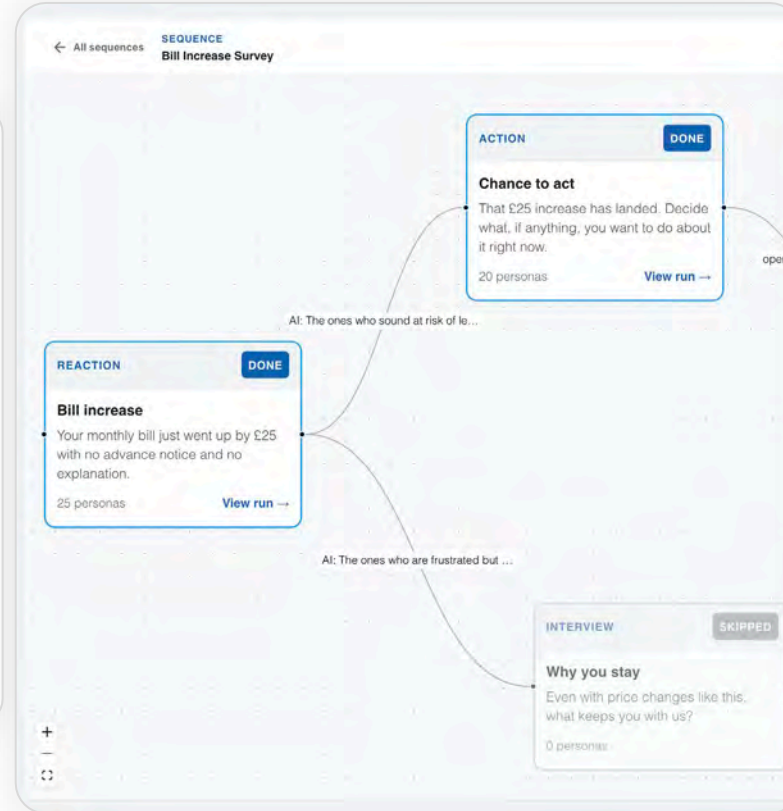
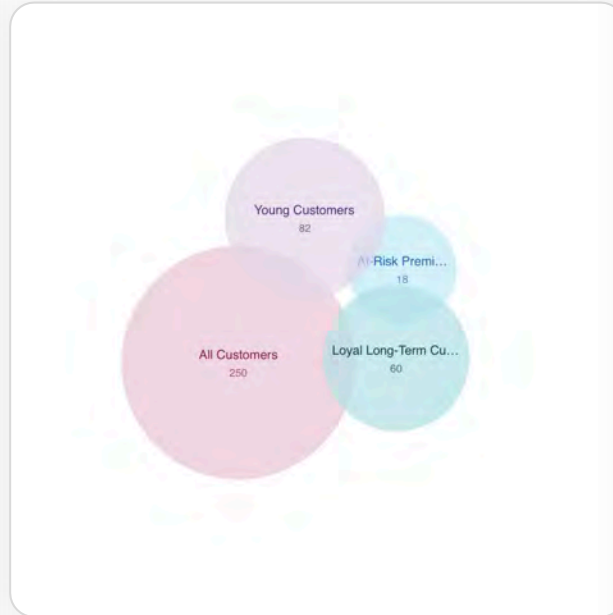
Narrative
Louis is a 45-54 year old skilled tradesperson living in Elliotborough, SV, with an annual income between 30,000 and 50,000. He has been a

Similar personas

Persona	Similarity
Luke Saunders	73%
Liam Thomas	72%
Victor Palmer	71%

Show 7 more

Interview this persona
Start a conversation with this customer. Their replies reflect their profile and recent history.



INSIGHTS

All three personas abandoned the payment flow, but at different stages and for different reasons. Two users (Elliott and Jay) re...

2 personas dropped at "Review and pay"

Themes (2)

- Unexpected processing fee at checkout
- Form validation blocking progress
- Direct debit escape hatch ineffective

Outliers worth drilling into

dist-927: Louis never encountered the fee issue because he was blocked earlier by a broken expiry date field that wouldn't accept input...

dist-187: Jay attempted to use the direct debit link to avoid the fee but found it non-functional, reinforcing his perception of the charge as a...

Suggested follow-ups (run as interview)

When you saw the £4.50 card processing fee added at the review step, what went through your mind—was it the amount itself, the surprise, or som...

You mentioned the fee felt like a 'scam' or 'extras'—can you walk me through what would have made that charge feel more acceptable or transparen...

For Louis: when the expiry field kept rejecting your input, what did you try and what made you decide to stop rather than keep experimenting?

If the processing fee had been disclosed upfront on the account overview or at the start of the card form, would that have changed your decision to...

Jay: you clicked the direct debit link hoping to avoid the fee—what did you expect to happen, and how did the actual behavior affect your trust in the...

Addressing functionality issues > reduce journey friction > improve payment success

01 Ingest & Extract

Create a persona agent replica of each customer, fully anonymized, based on 1st party CSG data and client data (3rd party).

02 Explore & Ground

Explore how customers fit into prescribed client segments (how the client sees the customers) and how they naturally fit based on their goals and behavior (customer data tells its story).

03 Research & Simulate

Risk free and cost-efficient way to glean insights from the customer base and simulate the impact of customer experience or value proposition (product or pricing) changes on business and customer metrics.

04 Analyze & Promote

Automated insights, uplift analysis on key metrics at different levels, and when ready to deploy, Xponent clients can promote changes from JO in the Sandbox to production.

CSG Confidential



A Unified Communications Experience

CHALLENGE

- The bank's manual process of sending the emails, tracking the opens, and initiating the mail pieces to tens of thousands of customers each month was labor intensive and costly

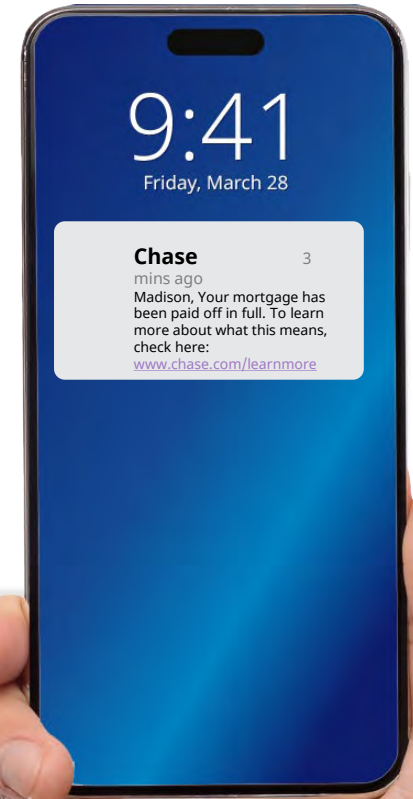
SOLUTION

- To simplify its cross-channel paid-in-full notifications, the bank deployed CSG's communication and experience management tools.
- CSG automation enforces state-specific rules—like mailing requirements—and syncs with the ESP to trigger a mailpiece if an email bounces or remains unopened after three days.

10%
Increase in
Digital Channel
Delivery

15+
Years Of
Partnership

IMPACT



Congratulations on paying off your home

Dear Jeremy Bongio.

Paying off a home loan is a big step in many people's lives.

Now that we received your payoff and closed your account, we expect:

We'll mail you a refund
You'll receive a check for an estimated \$258.92 by 9/12/2022 to your account.

We'll send the lien release to your county recorder
secured by a property

You can use this email to confirm that your loan is paid off until the county recorder's office releases the lien. Please contact your county recorder's office if you have questions or want a release.

We'll mail your interest statement.

- We'll send Form 1098 (Mortgage Interest Statement) to you in January.
- Contact your tax advisor if you have questions.
- To change your mailing address, download the [Address Change Form](#) and follow the instructions.

Your relationship pricing may change

If you receive pricing discounts for having more than one account with us, we won't include them in our calculation of your relationship discount.

If we were reviewing your account to see if you were eligible for mortgage assistance options, we have canceled our review.

Thank you for being our customer. If there's something else we can help you with, here are several ways you can [contact us](#).

Sincerely,

Steve Procks



What Good Looks Like — Practical Next Steps

1

Start with one high-friction journey where confusion drives repeat contact — benefits status, permit renewal, or appeals.

2

Use the data and tools you already have before investing in new integrations.

3

Prove it on one journey before expanding to others.

4

Treat this as a cross-team capability, not one department's tool.

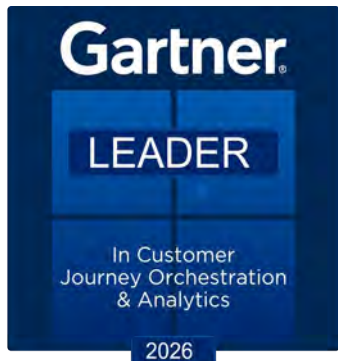
Thank you!

Brandon Sailors

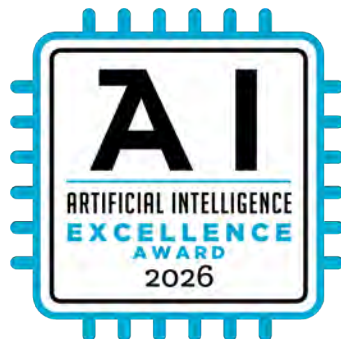
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Destination CRM list of 100 most innovative CX tech providers



Leader, Spark Matrix CCM/CXM