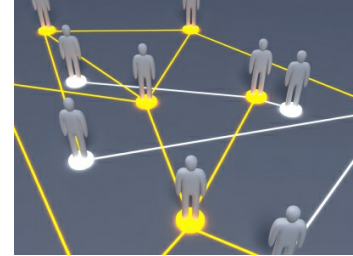


Taking customer experience across the omnichannel

By: Stephen Pappas

In today's digital era, customers expect service within seconds—whether it's calling AAA to rescue them at midnight in an unknown area, contacting patient access personnel to schedule an important appointment, or getting in touch with a bank to pay their bill or buy their first home.



They expect to interact with brands from anywhere, at any time, and on any device. That makes improving customer experience—known as “CX”—an omnichannel challenge.

Certainly, there are business gains to be made via CX excellence. [A survey by PwC](#) found that consumers would pay up to 16 percent more for better CX, and that 65 percent of U.S. consumers find a positive CX to be more influential than advertising. Similarly, a [Capgemini study](#) found that 80 percent of consumers are willing to pay more for a better experience. And when it comes to financial performance, [Bain & Company found](#) that companies which excel at CX grow revenues four percent to eight percent above their market.

Therefore, it's imperative for every company to provide a seamless experience across channels. That CX should be real time, meaning responsive in the moment regardless of the point of interaction (website, call center, app, chatbot, store), yet based on a consistent knowledge base.

Consider the experience of a customer trying to take out a loan with a bank. The first point of interaction might be the website, where one can look up information on loan types and features, but it lacks details like current interest rates. Enter a chatbot driven by artificial intelligence (AI) which can intelligently ask a few questions for the customer while gathering useful information in case the customer needs to be escalated to a human representative. Finally, the person may call a representative who uses a call center information system to answer further questions or make recommendations.

Within this banking scenario, you have three different interaction channels a customer might encounter. If the customer receives consistent, useful information, and his or her needs are screened quickly and intelligently, that's good for CX. If, however, the website says one thing and the account representative another, and if the chatbot was perceived as a waste of time, the customer may give up and contact a different bank.

In effect, CX hinges on solid information, intelligent answers to customer needs, and content delivered quickly in ways that suit the interaction mechanism. But consistency can be tough to pull off when there are multiple customer touchpoints and two or three different systems serving up information. As a result, it's wise to think about the type of technology foundation that supports consistency, speed, and purpose-fit content presentation—but only after you've established solid best practices around how you will manage the CX improvement effort.

Best practices first

Taking CX to its optimal level should begin with best-practice thinking about how your team will approach CX. This should precede layering in new technologies.

Some CX best practices are well understood, such as the need to involve top management, as well

as making CX improvement a multi-disciplinary effort. In the early days of CX, it was often the marketing or customer service function that was left to drive the CX effort on its own, but in practice, excellence in CX is going to involve other departments like aftersales service organizations, information technology leadership, or the product management team.

Given that CX projects will very likely involve multiple departments, one of the key principles to keep in mind is to get everyone working off the same plan. That can be more difficult than it sounds, in that departmental functions often have different objectives and metrics that might work at cross purposes if the larger CX goal isn't kept in mind.

For instance, consider a CX objective of supporting more next-day product deliveries to customers buying online to grow sales. The marketing department wants to put in place front-end tools and promotions to drive this objective, but the logistics function may be held accountable for inventory and transportation cost containment targets that weren't built on the new goals. Such potential tradeoffs need to be discussed, balanced, and aligned under the CX initiative.

It may turn out that added cost to service customers with faster delivery will be worth it based on capturing more sales and market share. But if everyone isn't working off the same plan, CX objectives can fall short. The answer is to start with an overarching plan that is customer-focused—that looks at objectives from the outside-in perspective. To the customer, all that matters is that they get that next-day delivery as promised; they won't care about unexpected transportation spend that wasn't factored into your plan.

Now that you have planned your CX objectives, you can get everyone moving in the same direction. Different departments should identify and start executing on functional goals—maybe marketing needs to infuse chatbots with new rules, while logistics needs to tighten its real-time collaboration links with carriers to be confident that delivery promises will be met.

Once you have your teams moving in the right direction together, it's time to measure and improve. Rate your progress on a continuous basis, assess gaps, and adjust—and CX improvement should follow. In short, have a continuous improvement framework for CX.

Foundational capabilities

Achieving consistent content and information flow to customer touchpoints is part process excellence and part technology. The process or human elements, as discussed, are about establishing CX goals early on, promoting cross-disciplinary collaboration, and thinking about how you'll measure and adjust. But consistency also is aided by a technology foundation that brings together CX-related content and refines it to fit each channel delivery mechanism.

Your tech foundation needs to be able to overlay multiple systems and points of interaction. It's utterly unlike the days when the customer call center was the primary point of contact, and good call center management system and representative training were the backbone for CX success. Today, one customer might be on the phone and getting interactive voice responses, while others are on a laptop, an app, or a chatbot.

Common rules and information should feed out to all these interaction points to ensure a consistent level of service. This need for uniform content delivery is helped by a central knowledge base that spans all the context needed to satisfy the interaction as well as provides scripts to respond to every situation.

Trying to put every possible piece of customer-related data into one big database isn't practical, simply because of the range of enterprise applications, front-end commerce software, and back-end legacy systems in many companies. It's more practical to think in terms of a layer of software that consolidates, organizes, authors, and manages essential customer-facing content. Look for technology that delivers consistent information for every agent or employee in every situation.

Importantly, this type of knowledge base for the omnichannel era needs to be much more than a data repository that can be queried. It needs to be a CX-focused knowledge pool that elevates information relevant to key CX interaction processes in the right format and message for that

medium. This platform also needs to be able to integrate with data from other systems, as well as with information streams from technologies like chatbots, artificial intelligence (AI) driven apps, and smart, Internet-connected devices.

Other capabilities that should be part of the CX knowledge foundation are the ability to curate content centrally, and the ability to orchestrate information across touchpoints and channels.

Content for the omnichannel world often needs to be “curated” or tailored to fit each mode of interaction, even if the variations seem small. For example, a person speaking to a human agent about what to expect from the day’s weather might be advised, “you better take an umbrella today.” By contrast, an Alexa device might respond to the weather question with the reply “there is a 70 percent chance of rain today, it might be a good idea to take an umbrella.” A customer interacting with a chatbot might need to engage the bot with a natural language question, like “should I bring an umbrella today?”

The point is that, depending on the CX touchpoint, core information often needs to be tailored and presented in slightly different ways. Workflow and orchestration capabilities ensure this “purpose fit” content gets updated, reviewed, and routed as needed.

As stated earlier, establishing a single source of truth is the goal with omnichannel customer interactions. To support this goal, you want a foundation in which you establish core information once but have tools that let you easily refine content presentation in a way that is purpose-fit to each CX touchpoint. These foundational capabilities will contribute to a seamless CX across channels.

End goals

The ultimate goal is to be give customers a great experience on any device or in any channel. Consider how Amazon has captured a leadership position by selling, interacting with, and servicing customers across any device in a consistent, reliable way, whether the point of interaction is an Echo device, the Amazon website on a PC, or tablet running its app. Amazon does many things consistently, from the way it hits delivery commitments to the look of its packaging, but the company is also excelling at presenting content effectively across devices.

In short, CX can be improved by a combination of best practices and technology application. To get there, brands need to focus on providing a consistent experience across channels, devices and points of interaction, ensuring that each interaction exceeds customer expectations.