JULY 2020 | QUARTER 3

CX insight

AN EXECS IN THE KNOW PUBLICATION

Forging
the Path
Ahead

**Customer Strategies
in Times of Change**

*STRIKING A BALANCE:
KEEPING THE
CUSTOMER CENTER
STAGE WHILE SHIFTING
COST STRATEGIES*

**8 WAYS TO SUCCEED IN A
POST-COVID MARKETPLACE**

*THE POWER OF TECHNOLOGY
TO SUSTAIN GROWTH*

**WHEN THE GOING GETS TOUGH -
STRONG TEAMS GET GOING!**

CX insight

AN EXECS IN THE KNOW PUBLICATION

in this issue

A Time to Reflect, Reevaluate, and Look Forward

Welcome to the July 2020 edition of the Execs In The Know Magazine publication – CX Insight. As we all pause, regroup, and reflect on these past several months, we recognize that while our path forward is not without obstacles it is lined with opportunity. Opportunity to take the once in a lifetime experiences we've recently encountered and put them to good use on behalf of our customers and our employees. In this issue, we focus on voice of the customer (VoC) strategies which has never been a more critical topic considering the rapidly changing business environment in which we are current operating.

Looking back on the year, we started 2020 with some grand strategies only to put those on hold as we were thrust into an intense journey to do more with less and quickly adjust to the changing times. As we begin to resurface and flip from situational reactive mode to strategically responsive mode, we can begin to dust off those strategy documents and reevaluate and position for the last half of the year. While uncertainty is still looming, we now have experiences in our arsenal that can prove valuable as we reflect and prepare for the upcoming holiday season and get our strategies back on track.

So, let's forge ahead together – onward to the next stage in this 2020 journey. We invite you to dig into this issue and explore the trending topics ranging from effective self-service, the art and science of balancing cost pressures and customer experience, outsourcing insights, team perseverance, through leadership perspectives and more! Enjoy.

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Striking a Balance

By Execs In The Know

Keeping the Customer Center Stage While Shifting Cost Strategies

The impact of COVID-19 on organizations is unparalleled in modern times. As leaders, you make seemingly impossible decisions at a rapid pace to protect your organization's financial viability and your employees' security. At the same time, you have customers' interests to protect and serve. We all know how important customer experience (CX) is to our future success, but in times like these, protecting the company while attempting to keep customers center stage can sometimes seem at odds with each other. How do you balance the need to minimize costs, maximize revenue, and deliver on the customer experience, all while also managing through the current impact of COVID-19 and preparing for life beyond it?

The truth is, we should always be focused on balancing costs, revenue, and customer experience. It is achievable but can seem daunting at times. The global pandemic has shone a bright light on this challenge in an unprecedented way. Many of us were forced to make difficult decisions to ensure that as we emerge from this situation our companies, teams, and customers are poised for success.

As customers ourselves, we have all experienced some of these necessary, but difficult, decisions by many brands in the last few months. For example:

BANKING – Some individuals are experiencing long wait times for even simple issues that cannot be solved online. What would typically take a few minutes to solve via a live interaction can take up to several hours.

TRAVEL – Those canceling flights or trips due to the pandemic may find they are only able to receive a credit, versus a refund. To ask for an exception, it can sometimes be a lengthy, difficult, and not a guaranteed process.

ONLINE SHOPPING – We are all fortunate to be able to leverage online shopping more than ever during this time, but shipping, delivery times, and product availability continue to present challenges. Even estimated delivery times are not always accurate and trying to get a revised date is not always easy.

These are just a few examples, but it is safe to say that every industry has been impacted and have

been forced to make some difficult decisions. These decisions may not necessarily align with customer needs, but these decisions and actions are needed based on the situation. It's inevitable to not encounter friction when you pair anxious and frustrated customers with organizations that had to throw their current business plans out the window. While some decisions made by a company will be less than satisfying to a customer, you still have an opportunity to retain that customer based on how the issue is handled and how your brand adjusts.

So how do organizations best navigate this push/pull between controlling costs but also delivering on the customer experience?

Understand Friction Points to Identify Services Gaps and Opportunities

First, it is important to recognize where companies' processes and policies conflict with customer needs. Now is a good time to reflect, given that many decisions were made quickly to respond to the pandemic. For example:

- Companies are making tough policy decisions, such as only allowing credits vs refunds for cancellations. This may be understandable from a business perspective – but from the customer's perspective, it can appear tone-deaf, especially if the message is not delivered well.

- Staff reductions have taken place for many. While these cutbacks may be understandable, customers with a need to talk to someone immediately are feeling the effects of additional wait times when they are already emotionally charged.

- Similarly, given the shift to Work-at-Home (WAH) coupled with reduced staff, customers in need of a live agent to solve a complex or dire situation may have a hard time reaching real-time help in their channel of choice.

- Front line employees are also under pressure and are often delivering bad news, or being on the receiving end of very frustrated, and sometimes verbally abusive, customers. These are possibly very different interactions from what they are accustomed to handling, requiring advanced problem-solving and an increased need for using soft skills.

ORGANIZATIONAL REALITIES	CUSTOMER NEEDS
Reduction in staff	Timely response
Staff/channel availability	Live agent needed
Agents under stress	Understanding
Policy changes	Solve issue
Required skill set changed	Complex issues/handholding

BOTTOM LINE: Even if your organization has had to make some tough, but necessary decisions, now is a good time to look at the impact of those decisions and understand the friction points with your customers. Once you have a solid handle on that, you can re-evaluate and take further action to minimize the impact to the customer.

Make Fact-Based Decisions, Giving Your Customers a Seat at the Table

Again, you may have been put in a situation where you made some fast decisions with limited data during the early stages of COVID-19. We all know it is always better to make intentional decisions versus knee jerk reactions, but it's not always possible. Even under pressure, here are a few things to consider to ensure decisions are based on data rather than emotion, thus minimizing negative customer impact.

- When evaluating a potential (or current) shift in policy or process to address business or cost needs, assess the potential impact of the decisions to customers and the company's bottom line, using both customer and operational data. As referenced in our recent blog, leverage multiple data sources to understand what your customers expect and how they are experiencing any changes you have made.

- Re-assess your current metrics and implement the right measurements to give you a balanced view of efficiencies, service levels, customer experience, and agent effort/experience. Although you may be tasked with driving greater efficiency, identify efficiency metrics that are tied directly to positive customer experiences.

- If you have shifted more transaction types to digital channels, your agents are likely now handling more complex issues. Assess the types of issues agents are handling now and ensure you have appropriate training, tools, and listening posts (i.e. quality processes, customer-facing metrics, etc.) to drive maximum productivity and issue resolution.

- More than ever, service journey mapping using data should be conducted often to identify customer pain points and opportunities for driving efficiencies.

- Determine the estimated timeframe for these changes/decisions and re-assess in appropriate intervals. In other words, avoid the risk of implementing a policy meant to bridge a short-term cost containment issue without recognizing when to reverse it based on the data.

Last, but not least, in every virtual or in-person meeting, ensure your customer is represented. When in-person meetings were the norm, one organization we spoke with had an empty chair in a specific color that represented the customer. It was symbolic, but it ensured the customer was always first in mind, even when making tough decisions.

BOTTOM LINE: Even under pressure to make quick decisions in the face of a chaotic environment, use data to guide you to the right decision. Also, if you were forced to make decisions before data was available, ensure you reassess the impact when the time is right and use it to pivot as appropriate.

Be Creative and Aggressive with Workflow and Automation Alternatives to Reduce Agent and Customer Effort

Many organizations were already on the path to digital transformation, and the impact of COVID-19 has accelerated this effort. As you continue to assess impact to customers and agents alike, continue to challenge yourself and your organization to find more efficient and customer-friendly alternatives to responding to customer needs. This includes your agent tools and workflow as well as the need to support the vision and reduce effort on the part of both customers and agents. For example:

INTEGRATED AGENT DESKTOPS - In a recent study, almost 40% of companies said their agents struggle due to lack of an integrated desktop. Agents need to find answers and solutions quickly, so how you serve up content to them affects how quickly and effectively they can support customers.

360-VIEW OF CUSTOMERS – In a perfect world, agents should be able to quickly view the customers' journey, identify their issue, and what actions they have taken to that point to solve it.

Smart workflow – Now, more than ever, you want your most valuable resources (your agents) handling the most complex and sensitive issues. This most likely means adjustments not only to agent workflow, but more aggressive efforts to push customers to self-help capabilities for simple issues.

INTENTIONAL DIGITAL CHANNEL STRATEGY – Assess your channel strategy. It has likely shifted as you try to direct more volume to digital channels. However, ensure your strategy is right and its accomplishing the objective of avoiding repeat contacts and less customer frustration when customers do get to an agent. To know if your strategy is the right one, leverage your data and processes to ensure you (a) understand what your customers want; (b)

journey map to understand pain points and direct to the channel most able to solve; (c) measure and analyze metrics (by channel and contact type) such as issue resolution, customer effort, agent effort, repeat/number of contacts to resolve.

AI-POWERED TOOLS – Getting customers to answers quickly is the goal. Although AI and bot technology may not be in every organization's roadmap yet, consider use of bots to support the agents, and the use of AI to get customers the answers they need faster.

CREATIVE SCHEDULING – Given the environment and WAH, you may have more flexibility than you did in the past with split-shifts or other scheduling options. Look carefully at your arrival patterns and how you can leverage your staff to meet customers where they are.

OPERATIONAL METRICS AND PROCESSES – Again, ensure your metrics, processes, and focuses are balanced to drive desired results. Quality processes, coaching, training, and metrics should be aligned with the goal of reducing customer and agent effort.

BOTTOM LINE: In understanding the friction points, continue to look for and implement creative ways to reduce effort; driving efficiency while also solving more issues. This comes in the form of some "low tech" solutions such as creative scheduling and operational processes. The biggest gains will of course be realized with automation. Although these tools and solutions may be an upfront cost you weren't expecting, the medium to long term gains are significant.

Don't Stop at the Decision

When you're frantically trying to respond to market and economic challenges, the details sometimes get lost along the way. A robust change management process, with a dedicated "tiger team," is essential to ensure decisions are implemented and executed well. These are often critical and cross-functional decisions which need careful coordination - from technology,

to process, communication, training, and measurement. You need an agile team with a structured process for implementing change quickly, effectively, and has the ability to pivot as needed. If you didn't have time to do this early during the pandemic, it isn't too late!

It goes without saying that the goal of any business decision is to ensure it is (a) achieving your stated goal; and (b) not creating an opposite or unintended impact due to loss of customer loyalty. Part of the change management process is to not stop at the decision or even the implementation. You have to measure the impact and understand the cost (or cost savings) of the decision being made, and the potentially far-reaching cost of a negative experience. Conversely, you also need to know the positive impact of any of your actions so you can either expand on those ideas or continue them while they are successful.

BOTTOM LINE: Change management is crucial to ensuring measures taken are executed thoughtfully and measured for effectiveness so you can adjust as needed.

Communicate Clearly and Often

Honesty. Transparency. Consistency.

We could almost leave it at that. These characteristics must be the centerpiece of your communications strategy now and as you prepare for the future. Tone and genuine caring matters to both customers and staff, so don't be afraid to be human – you can be open about the challenges the company is facing and the measures you are taking. Customers will appreciate it in the long run and reward you for it, and your staff will be better able to serve customers. How you communicate decisions impacting customers will have a lasting effect on your relationship with them, and this includes how you communicate to both customers and staff.

CUSTOMERS: Communicate clearly and up front, avoiding the element of surprise. Make the information available where they are likely to see it. In other words, do not hide the fine print. Some organizations have created pages on their websites or social channels with updates or have a consistent drumbeat of updates that are proactively sent when appropriate.

AGENTS: Do not bombard agents with changes, but be methodical and clear. Agents have one of the toughest jobs, especially in emotionally charged times like this, so it is not realistic to expect them to remember all changes they are tasked with understanding. Instead, incorporate changes into knowledgebases and systems while serving up information and changes in a timely manner.

BOTTOM LINE: Put yourself in your customer's and employee's shoes. Honestly assess if your communication is hitting the mark with honesty, transparency, and consistency. Communication is always critical, but especially when making rapid-fire decisions. What you communicate is important, but how you communicate will dictate how the message is received and have a long-term impact. Your agents are a critical component of your communications strategy and it has a direct impact on how the customer perceives your brand.

Training, Training, Training

Due to the changes and the sources of friction mentioned above, more than likely, your agents need some training refreshers. Empathy (the willingness to fix) and sympathy (the ability to share a common feeling) is more important than ever. While you may have a necessary policy in place that is not very customer-friendly, it is incredibly important for the message to be delivered in a way that conveys a genuine desire to help the customer solve their problem or get the information they need. Even if the resolution is not exactly what the customer wanted, if it is delivered with empathy and sympathy, it can be a positive game changer for your brand.

Depending on your industry and channel strategy, customers that get to a live agent may have very complex issues, requiring more advanced problem-solving skills. Ensure the agents handling these transactions are equipped with the knowledge, tools, skills, and empowerment to navigate these issues to resolution.

You may also have shifted various agents from one channel to another, but all channels are not created equal, so you may need to provide some extra training to help agents bridge that gap. For example, if you have switched agents from email to chat, you will need to arm the agents with some additional knowledge and skills to best support customers in that channel.

BOTTOM LINE: What your agents are being asked to do today is likely very different than it was three months ago. Continuously assess the minimum skills required based on their new reality and provide them with the training and tools they need to be successful and deliver the best customer experience possible. Lastly, ensure they are empowered to do what they need to do.

Stand Out from the Crowd

Although everyone is in the trenches, it is important to also use this time to build your brand and be the one company that stands out. Connect with your customers in ways you have not before. The smart brands are finding ways to connect with customers and staff, meeting them where they are now.

One example comes from Zappos, the online retailer – they implemented a separate phone line offering the ability for customers to just "talk." The company realized that many of their customers just needed someone to talk to or were having trouble locating hard-to-find items or local services unrelated to Zappos. This is not a luxury all brands have due to cost constraints, but this is an example of how Zappos extended their brand to helping others during this crisis.

Another example comes from Rothys, the sustainable shoemaker. The company collaborated with other brands to create the Open Innovation Coalition which channels their joint resources to personal protective equipment (PPE) relief efforts.

For others, it might be as simple as posting ideas on social media that could help your customers – in other words, "be of service." How can you help

them succeed? And realize that "success" to your customers may mean something very different today than it did three months ago. What does that look like and how can you be of service to your customers in creative ways? Perhaps that is a resource page on your website or social channels that provides useful information, or even fun ideas for summer at home.

BOTTOM LINE: Although many organizations are working hard to contain costs, you can be creative in how you also connect with customers (and the public) to shine a positive light on your brand. Look for unique ways to be a brand that customers talk about in a positive way during this challenging time.

It's Always Been About the Customer and It Still Is

When in doubt, put yourself in the customer's shoes. After all, you are experiencing the same challenges they are experiencing. You can still the be hero in your organization's story. It may look and feel different right now as you work to balance cost and CX, and those "wins" may not feel as frequent or obvious…but if you ensure your customer has a seat at the table of every decision you make and how you implement it, they will recognize and reward you for it later.
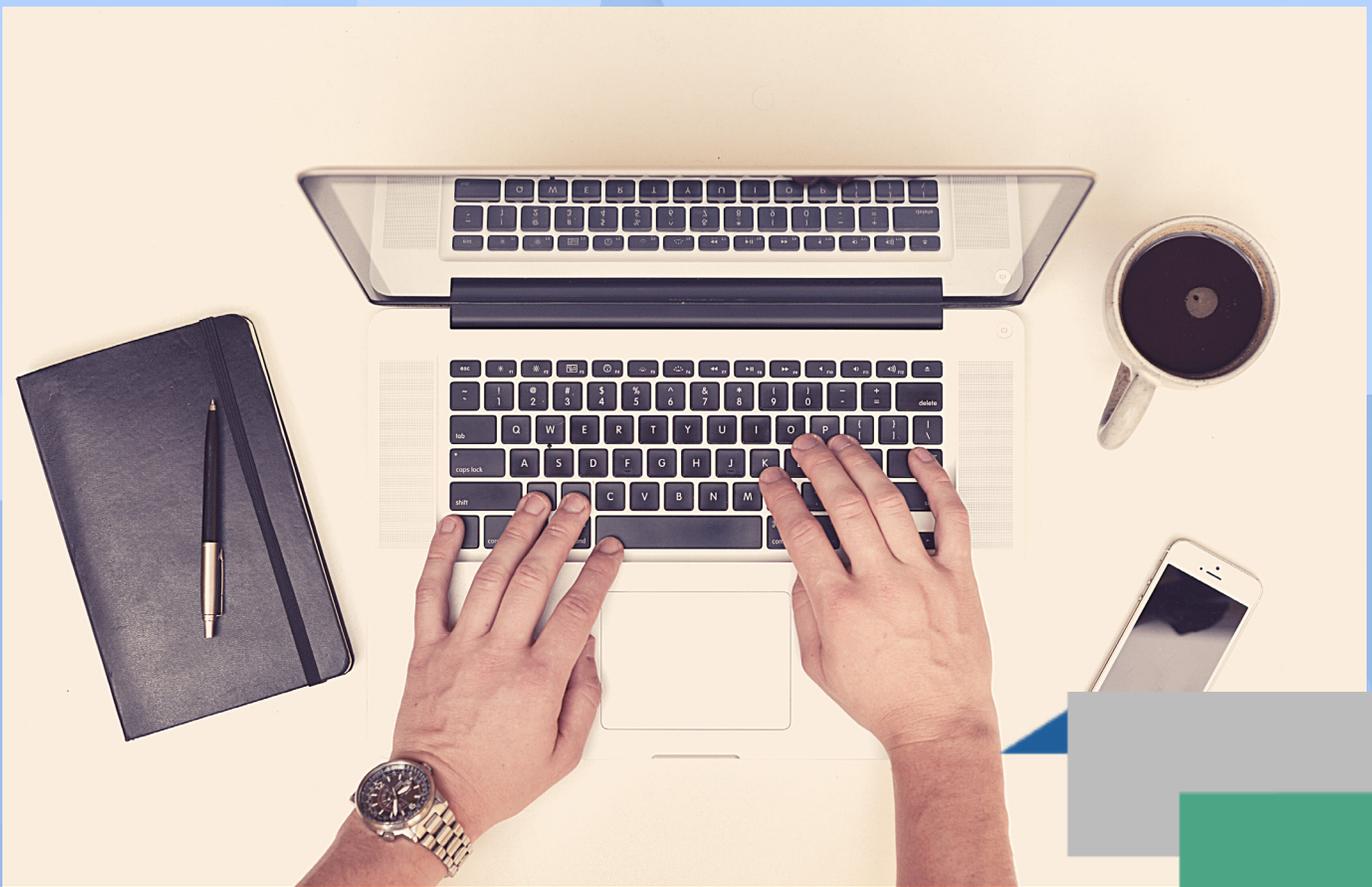
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FEATURED KEYNOTES

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When the Going Gets Tough - Strong Teams Get Going!

A story of amazing leadership, teamwork, creativity, and perseverance in the face of adversity   *By Execs In The Know*

The reality that COVID-19 negatively impacted the hotel industry early and significantly likely comes as no surprise. In fact, according to the **American Hotel and Lodging Association**, occupancy rates as of May 2020 are as low as 20%, while 70% of hotel employees have been laid off or furloughed. For hotels, this could mean an overall revenue decline of roughly 50% in 2020.

While this statistic may feel discouraging, there are many stories that instill hope during these uncertain times. We feel it is important to focus on the stories where businesses and leaders are finding ways to thrive. We want to share one individual's uplifting story with you.
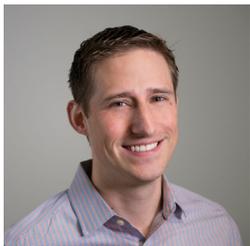
Meet Brandon Linton, Vice President of Workforce Optimization and Performance Management for Marriott International. If someone were to tell Brandon in early March that he would be involved not only in saving hundreds of Marriott jobs, but also helping tens of thousands of fellow Americans in a meaningful way, he might not have believed it.

Although Marriott has had to make some difficult decisions to protect the company, its customers, and associates, that has not stopped the company from tirelessly trying to find creative solutions to minimize the impact of the devastating economic toll taken by COVID-19. Here is one of those solutions we want to highlight.

A Creative Partnership

Let's get back to our lead in this story, Brandon. He oversees four Centers of Excellence for Marriott's Customer Engagement Centers – Quality, Knowledge Management, Workforce Management, and Analytics. Returning home from the Execs In The Know Customer Response Summit in early March, Brandon said, "I remember thinking to myself that this is likely the last trip I will take for a while. It hit me in that very moment what the company, including our 22 customer engagement centers, were facing."

As with many travel industry contact centers, Marriott's initial transaction volume increased as customers began canceling reservations in the wake of COVID-19. In April, Revenue Per Available Room dropped by 90%, which in turn contributed to a significant reduction in contact volume. As a result, Marriott found itself looking directly at the possibility of laying off hundreds of in-house contact center associates.

At that point, the leadership team, including Brandon, proactively began the search for solutions to prevent this from happening. The objective was to find opportunities with outside organizations experiencing sudden volume increases that might consider sub-contracting to Marriott to assist with that influx in volume. Although they found some possibilities, none of them seemed to be the right fit. Technology was a big part of the decision to ensure sensitive customer information was protected. The company could not take the risk of installing third party systems on its infrastructure, so the ideal partner would need to provide a virtual desktop interface. Additionally, executives wanted to ensure staff remained Marriott associates and could be on-boarded seamlessly with limited financial risk to the company. They found this was not as easy as they had hoped.

Fate seemed to intervene at the last minute as a Marriott partner brought an opportunity to them – a State Agency that needed assistance processing unemployment insurance applications. COVID-19 unfortunately created this need as the number of Americans needing unemployment insurance continued to rise. Marriott found themselves in a position to help while at the same time retaining its own staff.

The organizations needed each other and the leadership teams were determined to make it happen. Uncharacteristically, especially for a large corporation or a State Agency, it only took a matter of days from the time the opportunity was brought to Brandon and his team that the contract was written and signed.

Lightning Speed Implementation Planning

While the turnaround on the contract signing was an amazing feat, the gigantic effort to plan the implementation immediately began. Brandon and his team needed to identify Marriott staff to support the program, deliver training, implement required technology, upskill both management and support staff, create operational management processes, and start taking calls all within two weeks. Seriously, t-w-o weeks!

So how did they do this? According to Brandon, it was not all "smooth sailing." They adjusted in real-time and he is incredibly proud of how the team came together to execute the following:

STAFFING – Marriott asked its staff for volunteers to support this program, and initially 300 associates came forward, ramping to 650 in less than six weeks. Team members from Human Resources and Communications played a critical role, including coordination with Operations leaders in the centers.

TECHNOLOGY – The hope was the State Agency technology would be a seamless "plug and play" solution, but there were a few initial hurdles. Getting access to all required systems proved to be a challenging process. To make this happen,

a one-on-one session had to take place between each associate and a technician, which in turn took many hours to complete. The Technology team went to incredible lengths to coordinate and staff "virtual system provisioning rooms."

TRAINING – The State Agency conducted a Train-the-Trainer session with Marriott trainers. Within 12 hours, Marriott trainers were remotely delivering the two-day training course to associates. Marriott leaders and trainers found that some of the training content was not completely "lift and shift." Some customization was required based on the call types being handled and to adapt the content for remote (versus in-person) delivery of the material. However, the Training team was nimble enough to make these changes in real-time to ensure it was relevant and effective for the associates.

MANAGEMENT AND SUPPORT PROCESSES – Brandon's team was focused on making this as seamless as possible, ensuring alignment with the Marriott way of operations. For example, quality evaluations are loaded into a Marriott system. They are using the same auxiliary codes and processes for workforce management, and coaching/performance tools have not changed. Additionally, the knowledge management tool is integrated into the associates' environment, so it is a "one stop shop" for associates.

## Revamping and Post-Implementation Adjustments

With a highly expedited implementation and considering the typical time to competency for associates on any new program, one might wonder about additional training, support, and (of course) performance as they continued to ramp. Here are a few examples of how they responded:

TRAINING APPROACH - The initial launch included 300 volunteers, and again they quickly ramped to about 650 volunteers within six weeks. While the initial goal was to on-board as many as possible, Brandon and his team quickly realized the more effective way to on-board this number of associates was to do so in smaller groups of

about 20-25. Each of these "classes" would report to a specific supervisor, who would attend training a few days prior to the associates. This adjusted training plan was a four-day process that included program orientation/onboarding, system setup, self-paced training, and then virtual classroom training. By the end of day four, associates were taking calls.

SUBJECT MATTER EXPERT (SME) SUPPORT - Some associates quickly picked up the material, had extremely low transfer rates, and were proactively offering to help struggling associates. Because this level of support was effective, the team formalized it as a structured SME program, with half of the SMEs' day spent answering questions and supporting other associates. In addition, a post training nesting program was implemented in which live call support for operational, technical or program questions was added. An escalation process was developed to ensure associates have a clear path to answers, starting with the knowledge management system, then internal escalation to SMEs, and lastly as an escalation to the State Agency.

PERFORMANCE – One of the State Agency's key performance indicators (KPI) is escalations to a higher tier based at the State operations. Within a few weeks, the Marriott team's escalation/transfer
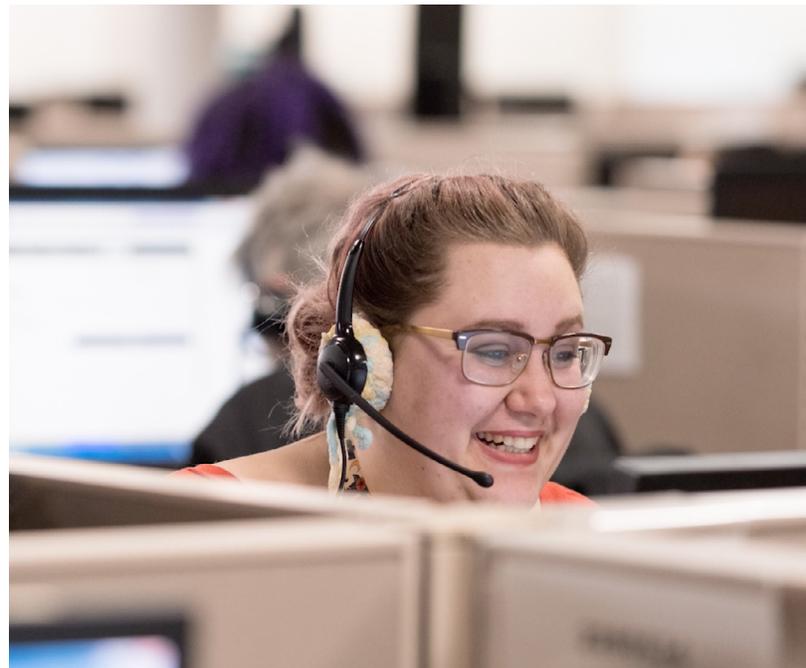
rate was on par with the State's own employees, a KPI Marriott has been able to sustain. To achieve this level so quickly, team members from Training, Knowledge Management, and Operations Support developed the best practice tools to assist associates, which they will be sharing with the State Agency for on-going use. Based on this success, Marriott associates are now being trained on additional skills and call types, meaning they will be able to help even more claimants and reduce the burden of additional transfers.

Reflection

Brandon makes it clear that this was an incredible effort where strong leaders from across Marriott's Customer Engagement Centers came together on the project team, including Operations, HR, Training, Technology, Communications, Deployment, Workforce, Analytics, Knowledge, Quality, and Finance. "We were only successful because of the cross-functional partnership and efforts of every leader and associate on the team."

Although the recent pandemic has been an incredibly difficult time for Marriott, its associates, and everyone alike, there is also a lot of good that has come from this particular experience. The company found ways to help not only Marriott and its associates but also the State's citizens.

"By making this happen, associates and support staff have guaranteed hours, continue as Marriott associates, and continue to receive benefits," Brandon explained. "Assigning hundreds of associates to this program also took our core network's slack capacity out, which meant more of the remaining Marriott associates were fully utilized and supporting Marriott customers without reduced hours."

An added Marriott benefit is the significant personal growth and development for everyone on the team, from associates taking calls to those in support and leadership roles. It has helped the management team identify top performers and leaders-in-the-making, putting them in positions of growth, and increased responsibility. The team has also benefited from key learnings that will

help them as they think about what life looks like after COVID-19 in a virtual environment. They can approach situations in ways they might not have considered in the past, from being better able to support language requirements to more effective remote training capabilities.

There are also benefits to the State Agency that cannot be understated. "We are helping residents of the state, who were laid off or had received reduced hours due to the pandemic, receive money that helps them care for their families," explained Brandon. "Claimants are grateful and happy to get through to someone, which has made this an extremely rewarding experience amid so much uncertainty." This team has taken over 400,000 calls, which represents tens of thousands of individuals and families who would have otherwise struggled to get timely and critical help. The State made that happen for their citizens by partnering outside the box as well.

What's Next?

According to Brandon, the agreement with the State Agency is open-ended as both organizations work diligently to manage through this point in time. Both partners hope the need for unemployment insurance begins to decline. If that happens, hopefully it is a direct result of businesses re-opening and people returning to work and travel.

This creative partnership between Marriott and the State Agency, which could only be implemented with the collaboration of every single person involved, has contributed to morale and financial security in a time where it is sometimes hard to find. While saving jobs, they have also helped thousands secure financial assistance they so desperately needed.

As for Brandon, he said, "This experience has made us realize, at Marriott, we can be faster and even more nimble than we imagined, which will only help us in the future. We are incredibly proud of what we accomplished through this effort, thanks to the team's flexibility, adaptability, and resiliency."

Five Key Takeaways

When facing adversity, there is no question it can be complicated and overwhelming to know how to respond. Do you do the best you can to keep your head above water? Or can you be creative and think outside the box to minimize the negative impact, while ideally creating a positive outcome? This is a story of the latter, which inspires all of us for what we can be doing to position teams for success now and in the future. Here are five key leadership takeaways to consider:

1. **GET OUT OF YOUR OWN WAY** – This starts from the top down. Signing a contract in a matter of days and implementing technology with almost zero roadblocks in less than two weeks are prime examples. As a leadership team, you need commitment to "make things happen" by empowering your team to make decisions and take decisive action. This often means changes to policies, approval processes, and management philosophies. Most importantly, resist the urge to require "perfection" – develop a goal with a plan and allow your team to execute.

2. **CHALLENGE THE STATUS QUO** – The world is a different place than it was three months ago. Customer needs and expectations are evolving in real-time. Work environments have dramatically changed. The ways in which companies manage and train staff must shift. "Outside the box" thinking, like Marriott employed, will need to be the new normal in how companies prepare for the future. In other words, do not be afraid to "mix it up."

3. **ENSURE FLEXIBILITY AND ADAPTABILITY** – It is clear from the story that the entire Marriott team is open to change, both strategically and tactically. This allows them to adjust in real-time to the day-to-day realities of the situation, contributing to the quick ramp and sustained performance levels. The importance of creating a culture with processes and management approaches that allow staff to thrive in a changing environment cannot be underestimated.

4. **KEEP IT SIMPLE** – To respond quickly and effectively, it is important to avoid over complicating the approach. Although Marriott took a calculated risk with this solution, the team recognized the importance of simplifying the approach to align with current processes where appropriate. This ensures a seamless, smooth, and effective implementation with the ability to remain nimble.

5. **ENCOURAGE STAFF TO BE PART OF THE SOLUTION** – Staff, at all levels, were part of the solution in this story. Leadership removed barriers, associates stepped up to assist others, trainers identified and remedied issues with training content, supervisors stepped in to adjust the on-boarding approach, and management adjusted supporting processes in real-time. Every single member of the team was empowered and involved in making this a success and all gained an experience that provided professional growth.

Thank you to Brandon Linton of Marriott for providing leadership insights.
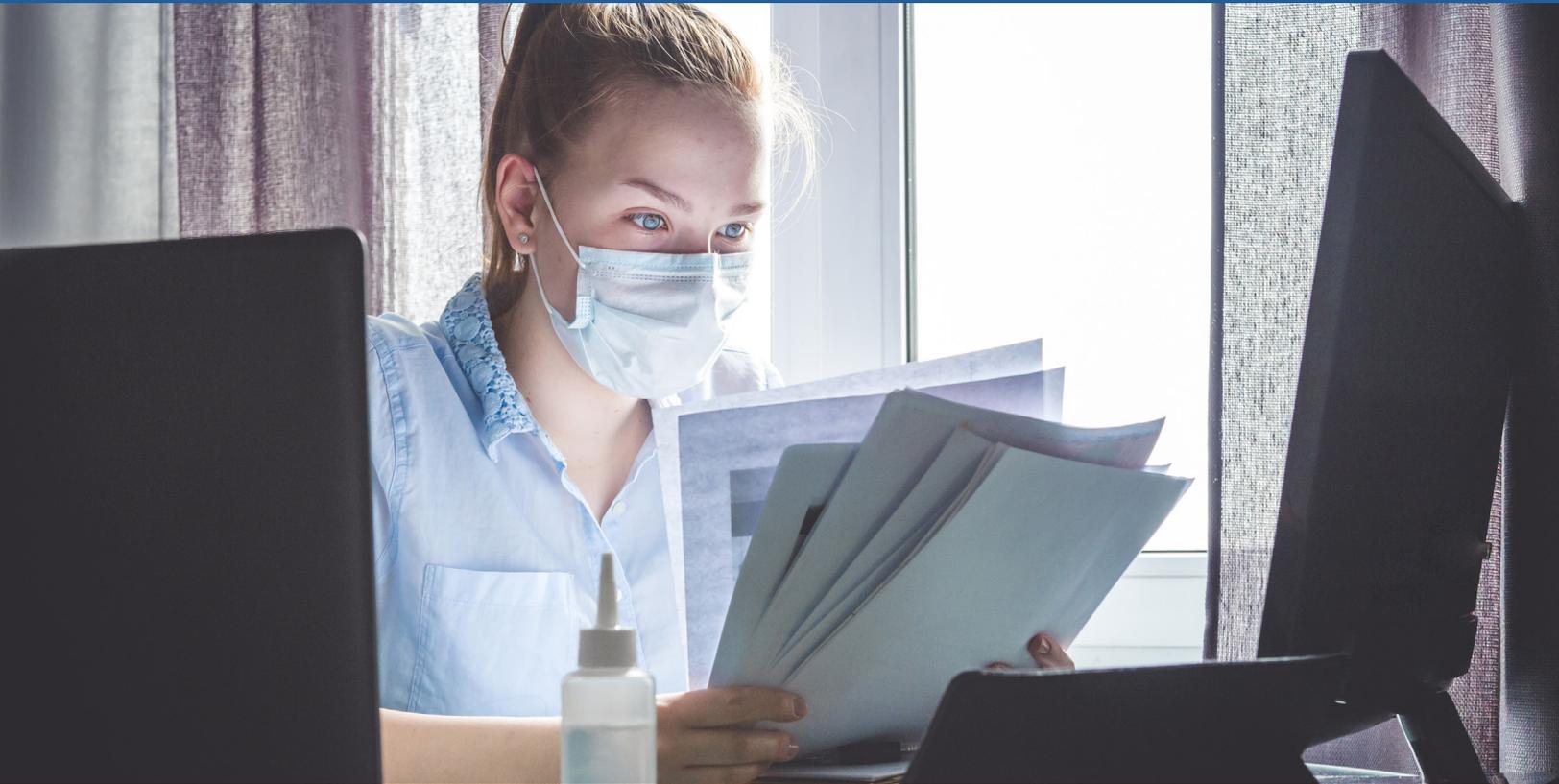
8 Ways to Success in a Post-Covid Marketplace *By Tom Cardella*

Companies of all sizes, from Global and Fortune 500s to small to medium businesses and the partners who provide essential customer relationship management services, learned critical lessons since the emergence of COVID-19. For most, if not all organizations seeking future success, these lessons present a path to success that will last long after this crisis subsides.

Most customer relationship management providers took a hit early on in the pandemic fallout. Costs rose, revenues dropped, and for some, contracts were set aside. Supply chains were also disrupted, further hampering organizations' ability to respond.

Some companies rose to the challenge better than others by relying on well-trained and highly engaged teams. They stayed aligned with customer goals to deliver contracted service levels at a time when excuses were inexcusable.

We've all had to re-evaluate our operations and continue to do so even being months into this pandemic. While each of us has charted our own ways, signs of resilience abounds. Nimble organizations were able to react quickly because of their investments in technology, licensure, infrastructure and cloud solutions, and – most critically – personnel and training. Previous transparent relationships and practices that were nurtured pre-pandemic kept organizations and their customers closely connected and focused on the rocky road they shared.

For many companies, the loyalty they showed to their customers, partners, and especially employees throughout the pandemic spoke

volumes about how their practices reflected a true ethos of customer service and the intention of being there tomorrow.

What's more, those companies who invested in people, policies, practices, and plans achieved success during the pandemic based on their contingency plans.

Everyone learned a lesson, but some better than others. At the height of the pandemic's fallout, these promises were challenged. As offshore manufacturing, supply chains, and service providers were strained, customer contact representatives were relied upon to be the first line of the customer relationship. From manufacturing to customer relationship management, a chorus of calls came to repatriate jobs and functions.

Throughout it all, one message was reinforced: solid relationships bridge distances, navigate uncharted waters, and will help maintain return on investment (ROI) in the post-COVID era. At **TLC Associates**, we quickly huddled with our team and customers to determine where we were meeting or exceeding in our service levels. We also connected with fellow providers in the market to explore what they were doing to best serve their customers. Below are eight areas we found that helped chart a return to a new normal:

REMAIN TRANSPARENT AND LOYAL. Building transparent relationships and nurturing previous practices kept providers focused on the path ahead. Consistent communications meant providers and customers were kept abreast of changing situations in real-time. For many, loyalty showed to their customers, partners, and employees throughout the pandemic spoke volumes about how their practices during the crisis reflected a true ethos of customer services and a commitment to being there tomorrow.

INVEST IN A TECHNOLOGICAL ADVANTAGE. Vendors who invested in the latest technology were able to maintain service levels, while pivoting to offer new solutions. At **TLC Associates**, we invested early on in a host of critical on-

premises software applications. Yet, the real game-changers were cloud-based technologies that empower companies to work from anywhere. This unmarried people from any single service location and untethered teams to work remotely as situations necessitate. What's more, this extends to home-based workers the latest in detection and prevention technologies with two factor authentication (2FA) and geo fencing to ensure endpoints are identified and trusted in challenging times. Companies have found this "layered" solution ideal for meeting changing needs quickly. With each new technological innovation, trained and experienced team members are supported by long-tenured, expert-level administration, who are also versed in the technology deployed.

ENSURE HEIGHTENED SECURITY. Cybercrime is a constant threat. The chaos borne of a crisis can invite even more vulnerability. Integrated omni-channel unified communications must be secured by systems that are Payment Card Industry Data Security Standard (PCI DSS) Compliant and Service Organization Controls Report (SOC 1), also known as Statement on Standards for Attestation Engagements (SSAE), Compliant with 24x7 monitoring and offsite back-up. Does this extend to your home-based workers? Remember, your network is only as secure as your least protected node. Additionally, fire detection, redundant telecommunications with uninterruptible power supply (UPS), on-site generators, and operations with access to multiple power grids are critical for non-interrupted call center operations.

KEEP INVESTING TO REMAIN AGILE. To paraphrase Greek philosopher Aristotle: investments in technology, licensure, infrastructure/cloud solutions, and highly engaged personnel must not be an act, but a habit. As the customer relationship management industry continues to flatten and level out to all players, making per-seat license spending per workstation a fraction of what it once was, where can a provider ensure a competitive advantage? Just ask those who failed during the pandemic.

Customer demands spiked and those who underinvested in infrastructure over the decade leading up to the pandemic were hard pressed to pivot. This is especially true in the conversion to various offerings, including work-from-home, leaving many unable to support their clients' customers. Conversely, those who invested in cloud-based solutions were able to simply plug in "from anywhere" with an Internet connection – like workers' and managers' homes – and were ready to work.

DELIVERY ABOVE ALL ELSE. Top-tier providers obsess over results and exceedingly agreed upon key performance indicators (KPIs). By insisting on keen awareness throughout every interval, such organizations maximize performance, helping clients meet their goals and enhance the brand experience with every customer interaction. For leadership, this is engrained behavior. Instill this into team members and motivate them to deliver results every day. It's no secret that common practice will include challenges, competitions, and awards for goals and milestones met. Seemingly simple, company-wide "attaboy" and "attagirl" recognition also works wonders to stimulate and incentivize remarkable performance. If your organization is confident in its ability to outperform other service providers in pursuit of maximizing client ROI, never shy from – and even welcome – client champion challenges.

KEEP "PEOPLE FIRST." Any "people first" concept should lead this list. Those providers who support a people-first approach (with high-level training that created results-focused experts in customer care, service delivery, and revenue generation) helped ensure complete goal alignment. Historically, engaged employees meet their metrics. From the early days of the pandemic to today, and into the future, those who succeeded reinforced a core message: It's all about the employee-to-customer relationship. Recruited, hired, trained and rewarded well, these employees bridge distances, navigate uncharted waters, and strive to deliver ROI.

ENGAGED LEADERSHIP. The flatter the organization, while having highly engaged,

hands-on leadership, the more the team can align to goals and drive results. Providers who embrace an authentic, family-style approach by leaders vested in and connected to the front-line representatives help ensure employees' satisfaction and a deep-seeded client connection. Does management participate in training that drives home quality standards? Are they part of creating a positive experience with each customer interaction? As a 100% employee-owned company, this is our cornerstone philosophy engrained across all sites and associates globally.

PREPARE FOR VARIABLES SEEN AND UNSEEN. Calls may grow for onshore repatriation of contact center operations. And whether related to a pandemic, a natural disaster, or a situation that makes the contact center unavailable or inoperable, the seed has been planted for greater opportunities for work-from-home. Are you prepared to grow your domestic and near-shore operations, whether in a contact center or with home-based agents?

In Summary

Critical lessons were – and still are – being learned by companies and the partners who provide essential customer relationship management

services. The most critical lesson of all may be a re-evaluation of how they've operated all along.

For some in the contact center industry, this re-evaluation will be a reckoning. For those organizations with the right balance of technology and cloud applications, security solutions, and a people-first ethos (focused on providing unfaltering customer service and executive-level guidance during the COVID-19 pandemic), this served as affirmation that the way they've operated all along proved to be the best way to navigate the path toward success in the post-COVID-19 marketplace. ✖

Tom Cardella
Founder & President
TLC Associates

Thomas (Tom) L. Cardella has been a successful entrepreneur for more than 30 years. In 1995, after completing his Executive MBA at the University of Iowa, he founded Access Direct. In 2000, Tom sold Access Direct to Interactive Corp (IAC) and became a CEO of a larger group of BPO companies with 15,000 employees, reporting to Barry Diller. In 2007, Tom founded TLC Associates as an employee-owned company grounded in its mission of providing the highest-quality contact center solutions.

TLC associates

TLC Associates offers a unique combination of experience and expertise in their ability to manage inbound and outbound customer experiences across a variety of industries.

Learn more at www.tlcassociates.com.

The Power of Technology to Sustain Growth

KIA Online Community Member Spotlight: Jean-Marc Codsi   *By Execs In The Know*

When COVID-19 hit, President and General Manager for Wargaming.net Jean-Marc Codsi and his team sprang into action to continue to support their highly engaged player community and the growth they've experienced due to individuals mandated to stay at home.

Codsi makes sure all his teams are working in harmony, ensuring their games are in line with the market expectations and the growth of the business.

He joined Wargaming.net in 2016 to help transform the customer experience (CX). Codsi's initial focus was to support the business by developing a stronger CX strategy, implementing state-of-the-art technology to fuel the strategy, and put the teams together to support the player experience. If you ask him, he will say, "It's been a great ride!"

When you build a solid customer experience (CX) foundation, it puts you in a strong position to respond and adapt to changing times. Here is how Wargaming.net evolved in response to COVID-19.

EXECS IN THE KNOW (EITK): I understand Wargaming.net is a leader in the free-to-play gaming market and has been in existence for 20 years. Tell me more about Wargaming.net and your philosophy for leading customer experience.

JEAN-MARC CODSI: Yes, Wargaming.net is leading the online strategic massive multiplayer online (MMO) gaming segment. I've discovered it to be the most engaged customer base I have ever seen. Considering that people can play for free, you would expect a short tenure and fast churn, however, that is not the case with our players. The game is hard to master, and it takes a considerable investment of time to get good at it, but once you get there, you feel like you are part of a special club.

With this deep-seated loyalty, the approach to customer experience is very different. When you leverage this fantastic energy, it's full of opportunities. But, like everything, there are also pitfalls if you deliver a vanilla customer care solution.

EITK: In recent months, despite COVID-19, I understand Wargaming.net grew. How did Wargaming.net support the growth of the business?

JEAN-MARC: Yes, the gaming industry actually grew as a result of people staying home. We saw a significant increase in playing time, number of battles, and number of lapsed players that came back to the game.

Generally, March and April are slower months for us, but not this year! To support this growth, our customer care teams had to quickly re-invent themselves, work close with our outsourced partners, and leverage technology everywhere possible.

We saw an increase in certain contact types which include resetting passwords for people coming back to the game and addressing players' technology issues due to new features or bugs in new releases – all which were quickly resolved

and replied to in mass. The teams did very well under the circumstances.

EITK: What new and/or existing customer support strategies helped you respond to the demand from the business growth?

JEAN-MARC: We took advantage of our global footprint to the full extent. Wargaming.net has approximately 4,500 employees in 18 different locations across the globe and we were already well on our way having all our state-of-the-art technologies in place when COVID-19 hit. In addition to our foundational technology stack, we had played with some bots and had a some very basic artificial intelligence (AI) in place, but they were very anecdotal or in very early stages of implementation. So, when COVID-19 changed the world, we benefited from our current technology position and we moved quickly to get the current and new technologies vastly adopted across our global footprint.

We have now globalized our technology, our outsourced partners, and most of our processes. Our global footprint enabled us to move quickly and leverage our people resources wherever they were in the world. When I look at what is being automated now and the speed at which things are being automated, including the AI on the website and what we are doing in the contact centers – AI and bots are being used at scale.

As a result of COVID-19, we've discovered the power of technology and we didn't have to compromise the customer experience. Now, and into the foreseeable future, AI is a key part of our suite of solutions, not just a crisis management tool.

EITK: How did you keep a pulse on the voice of the customer (VoC) during these rapidly changing times?

JEAN-MARC: Our customers are very vocal and we hear their voices in the forums, social media, etc. A few years ago, we implemented VoC tools such as Clarabridge and Brandwatch, but then realized that our community and development

teams were really in tune with the player community and picked up these signals through the forums.

This highly engaged player community knows the game more than anyone. Some of these players who play the game for several hours a day and several days a week will sometimes know the game more than most of the internal folks. So, the customer care organization is dependent on the technology for answers. AI is now pushing that information as opposed to someone trying to manufacture the information.

EITK: Did anything have to change in the way you manage and lead your customer service and support teams?

JEAN-MARC: Change is constant. COVID-19 sent everyone home, including our agents. We made some changes to our current underlying technology such as AI, looked to our crowd sourcing/servicing model to utilize the extremely knowledgeable player-base as a flexible yet key part of customer care organization, and we implemented work-from-home for everybody. These are tectonic changes which we also must consider as we move forward.

We also identified some emerging geographies in the East which were not previously on our customer care radar. Now, we are considering these geographies as our possible next frontier in the European Union.

EITK: What are some of your biggest initiatives for the remainder of 2020?

JEAN-MARC: We will be focused on capitalizing on the growth of our player base and give them enough content to continue enjoy the game post COVID-19.

We also need to face the reality of the current economic crisis and the consequences. We have some signs that online video games might not be the first expenses people will sacrifice but we are cautiously optimistic.

We also need to consider how we, as a company, will respond to our employees wishes to continue working from home, however, we care a lot about the social aspect of our business and want to maintain this social link to the workplace.

EITK: Are these the same initiatives you started with in 2020? Tell me how COVID-19 changed/did not change your initiatives for 2020?

JEAN-MARC: The priorities have changed. We have adapted to the new reality, we've built some scenarios, and we will carefully follow the evolution of this pandemic. One thing is certain, we must build more agility in the way we work, as flexibility and adaptability is what is currently driving us.

**WARGAMING.NET**

LET'S BATTLE

Thank you to Jean-Marc for providing leadership insights into effective strategies, the gaming industry, and Wargaming.net. To meet Jean-Marc or for more Q&A interviews like this, join the Execs In The Know **Online Community – "KIA"** *to access public and member only Q&A interviews and more.*

EITK's Online Community – "KIA" is an exclusive online community for CX Leaders to collaborate and innovate. **LEARN MORE**

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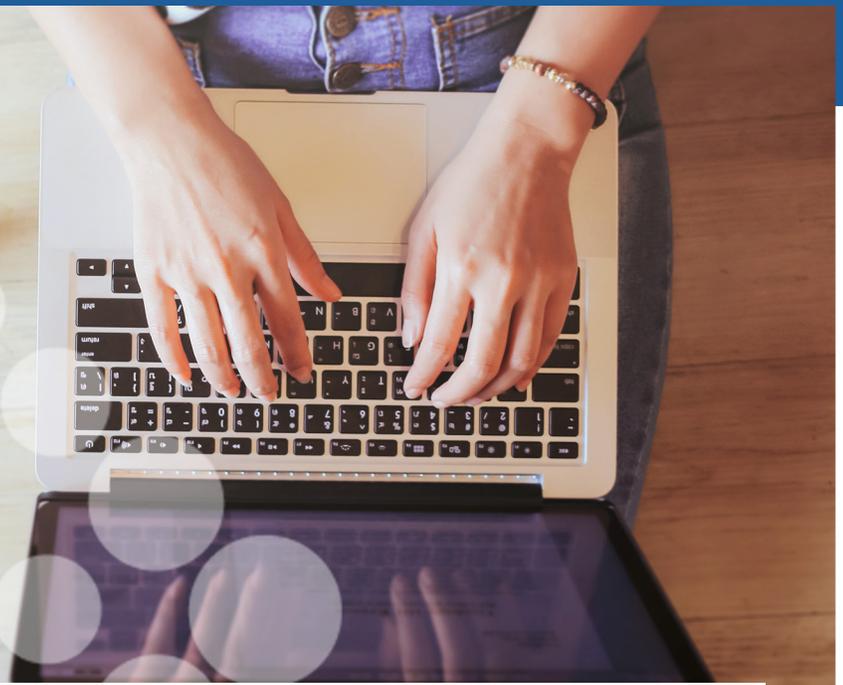
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In a Socially Distanced World, CX Capacity Really Matters

The Critical Nuances for Scaling Operations While Still Maintaining Performance In A New Normal

By Jeff Dixon

I've spent over 30 years in the IT and communications industry, with over 20 of those years helping clients deploy and utilize technology solutions. More recently, I have spent the past decade focusing on solving customer experience challenges through the use of technology; however, no amount of technology or modernization could have prepared the world for the COVID-19 pandemic.

Businesses large and small required the help of business process outsourcing (BPO) partners to maintain operations; however even BPOs were not spared either. I had a chance to interview Dave Afdahl, Chief Operating Officer at **ibex** to discuss how he is dealing with the effects of COVID-19 while continuing operations for their global clients.

JEFF DIXON: Thank you for joining me, Dave. I wanted to discuss the global impact of social distancing related to the contact center, and the impacts to the BPO industry. Can you describe how social distancing has affected global capacity and what some of the ramifications of the pandemic really are?

DAVE AFDAHL: To answer simplistically, whether you are outsourcing your support service or managing it in-house, social distancing has cut businesses prior call center capacity in half – basically half of your average seat utilization.

JEFF: Is this happening on a global basis?

DAVE: Yes, this is happening globally but there are some nuances. We have implemented social distancing proactively, even if it's not required. While there are still some countries that have not mandated the social distance policy, a vast majority of locations globally have government mandates that are impacting and restricting capacity in some way.

For example, in Jamaica, the government doesn't allow agents to use the same seat or share the same equipment in one day. This eliminates the traditional shared resources in a call center – resulting in a bigger hit for Jamaica. In contrast, the Philippines still allow shared resources and equipment in the call center.

Basically, the effect will vary by location and government mandates.

JEFF: In previous conversations, you've mentioned ways to mitigate this shrinkage

in capacity. Do you see modifying hours of operations helping or hurting businesses?

DAVE: The trend I've noticed with many clients is they are condensing their operation hours in order to respond to long wait times and service level issues. That's actually counterintuitive for two reasons. First, the longer your hours of operations run is a direct variable into your seat utilization factor. The shorter you run your operations, the more pressure you put on seat utilization percentage and you're going to lower it without any COVID-19 impact. This becomes really important.

The fallacy that I think a lot of companies have today, and what we're also hearing from our clients, is they don't want to open earlier or stay open later because they're not typically busy within those intervals. But, when I've had my clients stop and look at the data, what they notice is they're busy during every hour that they're open. And that was especially true during the first 30-60 days of this pandemic. Some clients have stabilized enough now that it may not be true for them anymore.

Therefore, if you open two hours earlier, you are now giving those customers another window to get help, and you're spreading out your hoop to

ultimately help service levels throughout the day. So, once we are able to convince customers to go down that road, it's actually been more positive to the customer experience.

JEFF: So, shortening the hours actually has a negative effect on service level, more so than clients might think.

DAVE: Correct. We're also seeing a lot of repeat calls, meaning customers call into the queue, get frustrated while waiting, and eventually call back two or three times that day. That just exacerbates the call volume and service level issues in the current environment.

JEFF: A lot of providers and branded owner/operators have turned to a work from home or remote worker solutions for the pandemic. From a front-line staffing and leadership perspective, what are a couple of things you've seen from those moves? Has it affected people's morale or attitude about the jobs?

DAVE: Working from home was a great stress reliever for agents when it was initially implemented to reduce the density in the call centers. This allowed us to social distance. We were not an at home company prior to COVID-19, but if we wanted to try to maintain our pre-pandemic headcount, we needed some place to put the other 50% of our staff. Working from home became that solution.

What we were seeing globally, especially in countries where COVID-19 was highly active, is that absenteeism started to increase for three reasons: (1) We had people who were in contact with presumptive positive cases, so they were going on self-quarantine. (2) You started to then have the first situations of people who were positive themselves or had family members testing positive, thus further exacerbated the absenteeism. (3) Once individuals noticed the virus impacting their city or state, more and more people wanted to be extra cautious about where they went and what they did. From that, we saw in-center absenteeism almost double from what our pre-COVID-19 numbers were. But, once we
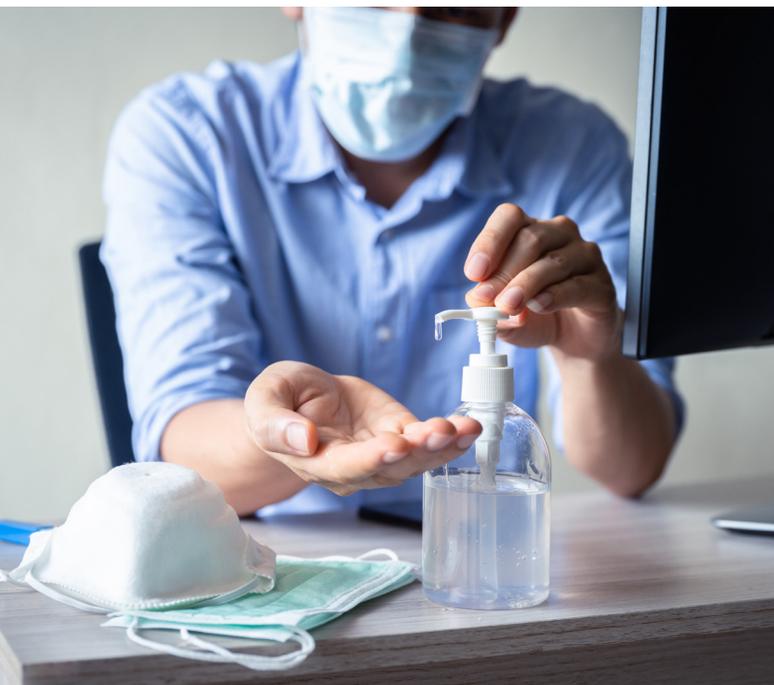
implemented a work at home solution during the first couple of weeks of the pandemic, we saw that absenteeism offset and start to come back into our pre-COVID-19 numbers.

Working from home was a huge stress-relief for employees and it directly improved their view of their job.

JEFF: The option to work at home must have had a positive impact on employee engagement with staff still working in the call center as well.

DAVE: Absolutely.

JEFF: You're the COO, and you're also responsible for privacy, PCI, and operating client programs in a safe and secure manner. What causes you the most stress with employees working from home?

DAVE: Frankly, what makes me the most nervous from a work at home perspective is being able to stay vigilant and preventing any data security issues or fraud issues. As you mentioned, we lose a lot of the internal controls that are originally in place within the contact center. Some of our clients, especially ones that are heavy PCI or PII, we don't have working at home just because of our inability to protect them the same way that we can in the brick and mortar call centers.

Most of the work done at home are things that don't have direct transactions and that are a little easier to manage. We have worked with certain customers to modify some of their processes and procedures to still allow the employees to work at home and maximize the job functionality that they had before they moved out of the office.

JEFF: Has the ability to support the omni-channel experience changed between employees working at home versus in center?

DAVE: We are still able to support the same channels (email, chat, voice, etc.) at home as we can in the normal contact centers.

JEFF: How does the work performance in the contact centers compare with that of those who work at home?

DAVE: Great question. We've obviously tracked performance in both the call centers and the working from home group to make sure there isn't any degradation. Performance has been very comparable between the two. From absenteeism to customer satisfaction, and even NPS, there isn't an inherent disadvantage with employees working from home. Historically, there's often been an impact on overall efficiency and production for some agents at home, but thankfully, we have not seen that show up in our data up to this point. However, we were also very clear with our employees that working at home is a privilege and that they needed to maintain certain levels of performance to remain in our work at home model.

Infrastructure quality matters. Initially, we saw minor impacts from off-shore, near-shore, and far-shore dependencies on the country's power and internet stability as factors that could impact working from home employees' ability to do their jobs.

To mitigate this, we would take a look at an agent's home internet. For example, we've switched from wireless to wired connections to increase the stability. What we wanted to eliminate the internet blips on WiFi that may cause a call to drop or something that would negatively impact customer experience. So far, our performance isn't very different between those working in the contact center and those that are working from home.

JEFF: That's great news! We've spent most of our time talking about the generic effects of social distancing in the contact center, but what about the types of clients that traditionally go through a holiday increase period? What should these clients be focused on with 45-50% of their employee capacity evaporating due to social distancing?

DAVE: Capacity is the one thing that keeps me up at night from a regular call center operations perspective right now. We typically flex up in October, November, and December for holiday customers. The reality is that if you need 200

additional seats immediately, you'll need to figure out how to manufacture that capacity.

To do this, you have three options: (1) become a work at home provider, (2) launch in a temporary site, which is fairly expensive from a cost-per-seat perspective, or (3) go out and create another call center on your own by building or launching something totally new. In the case of holiday-only increases, where you only need it for a three month seasonal spike, it doesn't always make the most sense to go out and build something completely new unless you believe that you'll be able to maintain some portion of those additional holiday agents into a steady state operation with your client.

Our recommendation, especially for customers who want to keep their costs at a minimum, is to leverage working from home when you have to create 12 months of capacity for a certain business. If you have a short-term need, and don't have heavy PCI or HIPPA requirements, working from home becomes the best option for the holiday influx. Another tough part about the

holiday season, aside from the physical capacity, will be the ability to plan appropriately and recruit the best available talent that could work from home.

JEFF: What has been your experience with virtual training programs during COVID-19 and has it been effective? What are some ways it has worked?

DAVE: First off, let me touch on the recruiting and hiring process. Lucky for us, we have not seen any negative impact in our ability to hire or recruit in any of our operational geographies. Actually, we've had an easier time recruiting, especially working from home. That could also be due to the high unemployment rates and that working from home is very appealing to many of the displaced workers due to COVID-19. Call center jobs might look a little sexier than previously noted, especially in the U.S.

From a recruiting perspective, offshore hiring has gone well for us. We've virtualized the hiring process, including the interviews with both recruiting and operations hiring managers.

The one thing that is not fully virtualized is some of the prerequisite minimum skills testing, the language testing (Versant, and other things of a specific skills nature. Typically, we need them to come on site to do those things. Not everybody has a computer at home to test in a different way.

A great example is one of our recruiters in Nicaragua, who is also a language coach, is conducting personal interviews over the phone. This allows our coach to score for language as well as overcome the issue of individuals not having computers in order to hire for the job.

We're getting creative to reinvent parts of our business in the virtual world with regard to virtual training. We actually launched virtual training as a pilot early on during the pandemic so that we could work through a couple of the nuances and get something fully tested and set up prior to the seasonal influx.

We have created virtual pilots for a major overnight delivery company, a Tier 1 Telco, a large retail membership club, and two global e-commerce giants. All these virtual programs have gone extremely well and all the training was completed with graduation rates equal to or better than within the contact center, prior to the COVID-19 crisis.

Social distancing will also impact your training room capacity. Traditional in-person class sizes are cut in half, meaning you now need two classes versus one, which will logistically occupy twice as many training rooms and double the number of required trainers. This will be a huge impact to the speed of holiday ramps, especially for accounts that have 4-5 week training cycles.

By incorporating virtual training, we can have a class with one trainer at normal class sizes. Since virtual training is so effective, some customers have reduced the total length of their training to help get agents into the production environment faster. They come to realized that if an agent can do 80% of what is needed in three days versus 100% in six days, then there is a direct benefit to solve the service level situations now.

JEFF: That's an excellent way of looking at it. I have one final question: In general, how do you think clients should rethink their deployment of technology (IVR, BOTs, self-service applications, etc.) to help offset peak holiday volumes given reduced capacity?

DAVE: If you can take a call or problem that is normally solved by an agent and have it solved in the IVR instead, you're going to reduce your overall call volume. This will potentially help solve your overall needs and therefore reduce the production seats required for the holiday influx in this COVID-19 environment. The impact of social distancing on the seat utilization, is obviously what's driving a big portion of the cost increase for the vendors. Outside of IVRs, there are some other ancillary situations to build in cost efficiencies and it is important for vendors and customers to work together to focus on these opportunities.

So right now, we've seen cost increase exponentially as part of the COVID environment however we've still been able to manage within our current budgets. Across the board, cleaning costs have gone up, and in some geos, you've
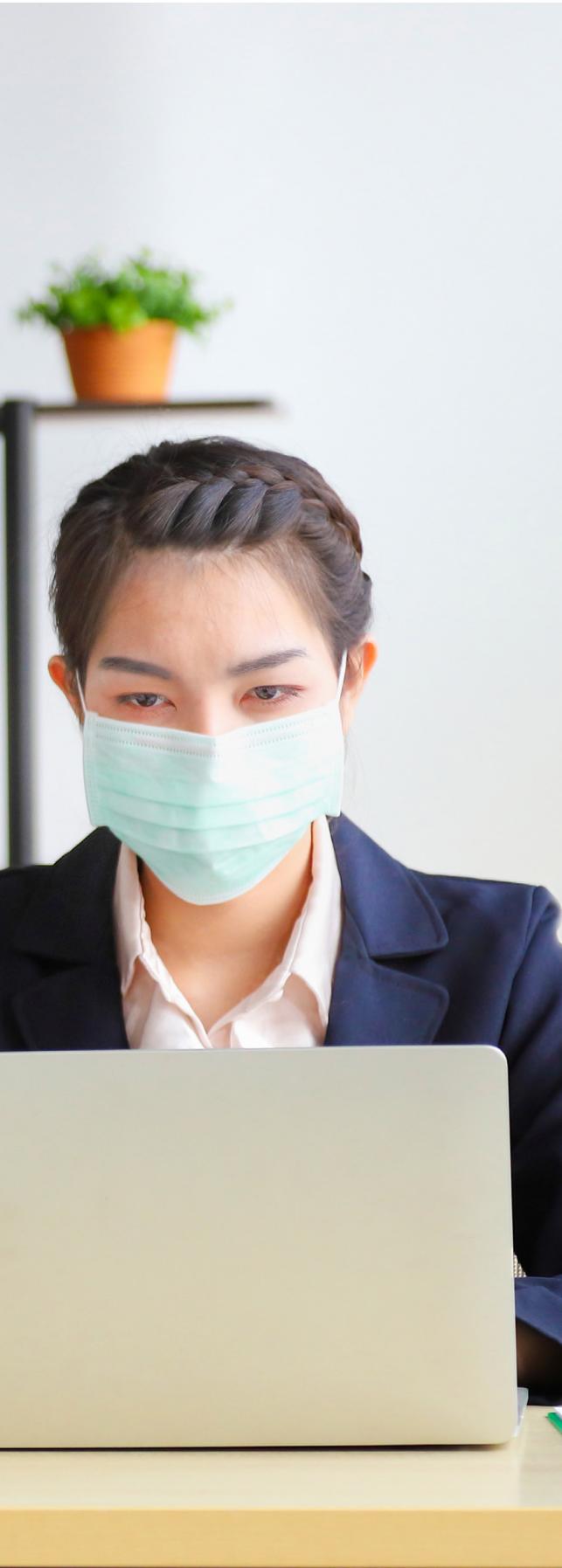
got door to door shuttle cost as you take people back and forth to work, depending on the local situations with public transportation. Whether you are operating an in-house call center or outsourcing, cost increases are a reality and probably something that everyone will experience, especially if the COVID pandemic continues into the foreseeable future.

JEFF: It really sounds like having a close relationship between client and vendor and working together is of paramount importance right now. Working together on these types of solutions are in the best interests of all.

DAVE: Absolutely.

Dave Afdahl
Chief Operating Officer
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Jeff Dixon
Senior Vice President &
General Manager
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Self-Help ≠ Deflection

By Execs In The Know

To improve efficiency and reduce customer effort in resolving their issues, organizations continue to ramp-up efforts to offer more self-help options in their quest for digital transformation. Many have been forced to accelerate these efforts in recent months to varying degrees of success. As we enter the second half of 2020 and prepare for what may be a very different holiday season, it's a good time to take a step back and assess the implication of these strategies to your organizations and customers.

Self-help can be an attractive customer care alternative for many obvious reasons, but it can also be detrimental if not implemented and managed carefully from the customer's perspective. Unfortunately, some self-help strategies do not live up to the name and are driving increased, versus fewer contacts and more customer friction and frustration.

In fact, according to results from the **2019 EITK Customer Experience Management Benchmark (CXMB) Series, Consumer Edition**, we found that 43% of consumers utilized an assisted (self-help) channel to resolve an issue, but only 31% were satisfied with the solution. Clearly, there is still significant opportunity for improvement from the customer's perspective.

Additionally, a study by Gartner Group research reinforces the reality that although many companies are adding channels to support a self-help strategy, it is not paying off. In many cases, it makes the resolution process even more complicated and lengthy, driving contacts to the service center. Based on studies of over 8,000 customer journeys, Gartner reports that 70% of customers are using self-service channels during their resolution journey, but only 9% are able to fully resolve their issues via those channels. "The good news is that channel switching does not appear to be hurting customer loyalty as much as it did in the past," says Devin Poole, Senior Director at Gartner. "The bad news is that it is definitely hurting organizations and their costs because while customers are using newly added self-service channels, they haven't stopped using more expensive live channels."

So, many organizations find themselves at a crossroads with their self-help strategies and need to take an outside-in view of the experience to determine where to go from here.

To frame up this discussion and put you in the customer's self-help shoes, let's look at an example of a real experience from one of our staff members. Perhaps you, as a customer, have personally experienced something similar.

Meet Carla Customer

Three of four TVs in her house were freezing up every few minutes and at times losing service completely. Now, this may not seem like an urgent issue, but given the current situation with her family all at home and Carla trying to work from home, she really needed the TVs operational. So, Carla tried rebooting the receivers and going through various troubleshooting steps she knew to try from previous experience. When this proved unsuccessful, Carla decided to reach out to the provider via their mobile app. Below is Carla's journey to solve this issue.

Accessed mobile app

- Clicked on 'Support'
- Chose the appropriate 'Service', in this case 'TV'
- Clicked on 'Diagnostic Tools'
- Clicked around on various content options but could not find relevant content quickly
- The app offered ability to chat or text, so chose 'Text'

Now in SMS/Text

- Chose the appropriate 'Service' again – 'TV'
- Texted a quick summary of the issue
- Received links to self-help page
- Clicked on link – content was not relevant to issue
- Texted again asking for help
- Received text again with same link to same content page (received same text with same link four times)
- Went back to app and chose 'Phone or Chat' for support

Now on Phone/Chat Support page of app

- Chose appropriate 'Service' again – 'TV'
- On screen, more articles appeared before providing contact info
- Attempted to review links/content, but too difficult to wade through and nothing seemed relevant
- Chat was unavailable, so called published technical support number

Now on phone for support

- Interactive voice response (IVR) stated Carla would receive a callback in 19-24 minutes so she chose that
- Carla received a callback 90 minutes later
- The agent that connected with Carla did not have any of Carla's account or issue information available, so Carla explained again
- The agent was not actually in technical support so had to transfer Carla
- Carla waited another 17 minutes for an agent
- Technical support agent did not have any of Carla's information so had to explain again
- The technical support agent went through some diagnostics and troubleshooting but was unable to resolve and scheduled a technician to come to home
- Because Carla was essentially without service on almost all TVs for a week, she asked for a billing adjustment
- The technical support agent was not empowered to authorize so transferred Carla again
- Carla was on hold for another 10 minutes and then had to justify the need for an adjustment to another agent

Summary of the Experience

- Self-help content was not relevant or easy to wade through to find resolution.

- When the self-help content proved to be inadequate, SMS/text channel did not actually work – could not reach a human via text and it kept sending a link to the same irrelevant content.

- Callback times quoted were significant'y inaccurate.

- It was difficult to find contact information to get to live support.

- Carla was misrouted to customer service vs technical support, even though she correctly chose technical support.

- No agent had any of Carla's information, so she had to repeat multiple times.

- Agents were empathetic and wanted to help but were not empowered to do so. They also had a very frustrated customer by the time Carla reached them which impacts employee morale.

Consequences

CUSTOMER MISTRUST - As a customer, Carla will be very reluctant to use self-help next time based on this experience and will likely proceed to contacting via a live channel in the future.

COSTLY TO THE COMPANY – Due to mis-routing and lengthy handle times caused by the need to repeat information that should have been available to the agents, unnecessary costs to the company were incurred by a multiple factor (think of something that should cost 1X costing 5X instead – would you want to pay for that?)

POTENTIAL AGENT BURNOUT AND DISSATISFACTION - The agents were empathetic but had to endure a very frustrated customer, did not have the information they needed to help Carla right away, and were not empowered to "do the right thing" without escalating.

POSSIBLE LOSS OF CUSTOMER – Based on this experience plus the service issues, Carla is now looking at competitors and alternative solutions.

INCREASED MARKETING COSTS TO REPLACE LOST CUSTOMERS, VERSUS FOCUSING ON GROWTH – as you lose your base of customers you must spend even more money to find new customers to replace them.

How to Avoid These Self-Help Pitfalls

Again, many organizations have made valiant attempts at ramping up self-help options and routing more 'transactional' contacts to digital or self-help channels. For most, the goal is to help customers solve the more common or simple transactions via self-help tools and digital channels, allowing skilled agents to assist with the more complex situations. Ultimately, we want to wow our customers and solve their issues…fast. Some organizations make the mistake of moving to self-help as a means of deflecting transactions away from human assistance to minimize costs, but often do so without a solid strategy. This is seldom successful because those organizations usually do not have the underlying policies and processes to ensure resolution with live agents, and the foundation of their self-help strategy is flawed. To avoid the above scenario and the possible consequences that are all too common,

we will share three main areas critical to ensuring your self-help strategies are intentional and actually do what they are supposed to do – help customers solve issues.

Capabilities and Performance Assessment

We all wish "self-help" were as easy as having Frequently Asked Questions (FAQs) on our website or pushing articles to customers, but we know it is not that simple. Some of you may have had to implement some short-term solutions in recent months to bridge a gap, but the overall design is critical to delivering an exceptional customer experience and maximizing efficiencies. Your processes and tools need to be intentional, and that starts with doing your due diligence to understand customer needs and behaviors, opportunities for self-help, and pain points with existing self-help processes. So, where do you start to ensure your self-help strategy is set up for success in the next phase of your journey? It starts with assessing your current strategy through a combination of the below:

CUSTOMER EXPERIENCE AND OPERATIONAL INSIGHTS – Understand your customers' current experience with your self-help channels AND what they want through customer surveys and input. At the same time, analyze internal data sources to determine when/where customers are falling out of self-help and why. Some of the metrics you may review based on transaction type, contact types, or service journeys include re-contact rates, number of touches to resolve, handle time, abandonment rates, customer satisfaction, self-help utilization rates, customer effort, and resolution rates.

JOURNEY MAPPING – Put yourself in the customer's shoes, conducting end-to-end mapping of all service journeys that currently offer self-help options. From the customers' viewpoint, assess and document each step of the process including where the gaps are, if you were able to solve the problem easily using self-help tools, if relevant content was available where you

needed it, and if you were able to reach an agent if desired. Once reaching an agent, was the agent able to easily access your information and were they trained and empowered to help you quickly? Additionally, assess all service journeys and determine areas of opportunity for self-help that you are not offering today. In other words, identify where the gaps are with your current self-help options and determine additional opportunities for self-help as you navigate through each journey.

TECHNOLOGY ASSESSMENT – Re-examine your current technology capabilities and what enhancements you can make with your current technology in the short term to improve your self-help utilization and performance. Based on your findings from customer insights analysis and journey mapping, determine what technology improvements or additions you need and assess the Return on Investment (ROI) in terms of key metrics such as handle time, resolution rates, customer satisfaction, and re-contacts.

Process and Tools Design

Once you have completed your due diligence to assess your current performance and self-help utilization, you then need to create and implement the appropriate processes and tools to support your self-help vision. The end goal should always be focused on how to drive to resolution quickly and accurately to minimize repeat contacts and increase customer satisfaction. To accomplish this, consider the following:

AGENT AVAILABILITY AND ROUTING – Even with a robust self-help strategy, customers need the ability to reach the right agent easily if they are not able to quickly self-serve. If a customer opts out of self-serve, the last thing you want is for that customer to be misrouted to the wrong department.

CONTENT - Serve up relevant content based on the customer's issue. Do not expect customers to wade through irrelevant content to get an answer. As you saw in the provided example, that is not "self-help" and can only cause greater frustration to the customer, and ultimately greater cost to the company.

TRANSACTION ROUTING – From your analysis and journey mapping, direct the right transactions to the right channels that have the greatest possibility of resolving the issue. This may seem obvious, but in the provide example, that clearly was not happening, and is not all that uncommon.

AGENT TOOLS – Do not make it harder on your agents than it already is. They too need content served up to them to help them navigate an issue to resolution. Additionally, when a customer reaches an agent, the agent needs to know immediately what the customer has already tried and their specific issue. As customers, we have all experienced the frustration of being asked to enter information prior to reaching an agent, only to be asked to repeat that information. This is frustrating to customers and wildly inefficient.

**COMMUNICATION** – Communication to agents and customers alike is important. The process to resolution needs to be crystal clear to customers – so your app, website, and all customer-facing content needs to be easy to follow and allow the fastest path to resolution. Similarly, communication to agents is critical as policies and processes change.

AGENT EMPOWERMENT – The right agents need to have the right level of empowerment to solve customer issues. Although you may be driving more volume to self-help channels, the issues being handled by agents may be more complex and require more independence from agents and the ability to go "off script' as needed. Once a customer reaches an agent after trying self-help, it is detrimental to the customer experience to transfer them again because the agent is not empowered to resolve the issue. This needs to be considered as part of the process and as mentioned above, trained to accordingly.

People Approach

As you move into the second half of the year and approach the holidays, you may be planning to staff up again. This likely means your hiring and training strategies need to be adjusted depending on your self-help strategy. Your people strategy must align with the design and processes you have developed. You may have seen first-hand in recent months how the skills needed to support the types of transactions your agents are handling have changed. By the time your customers reach an agent, they are potentially more frustrated because they have not yet been able to solve their issue or feel like they have been in a never-ending loop. Look carefully at your minimum hiring requirements and training programs to ensure you are hiring and training to the right skills. For example:

EMPATHY – Empathy is more than saying to a customer, "I'm sorry", or "I understand your frustration." With more complex transactions being handled by agents, and customers who are more emotionally charged, it is more important than ever for agents to demonstrate a true desire to help the customer and relate to their issue. This
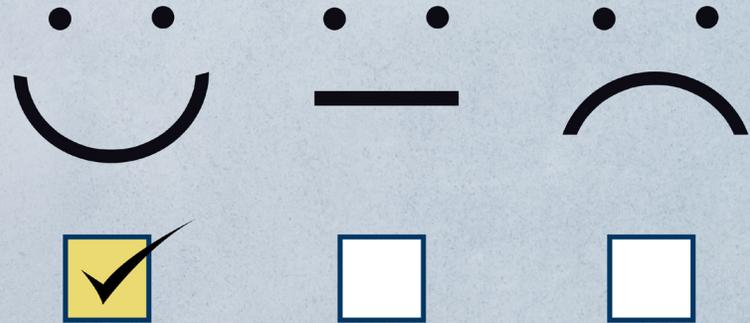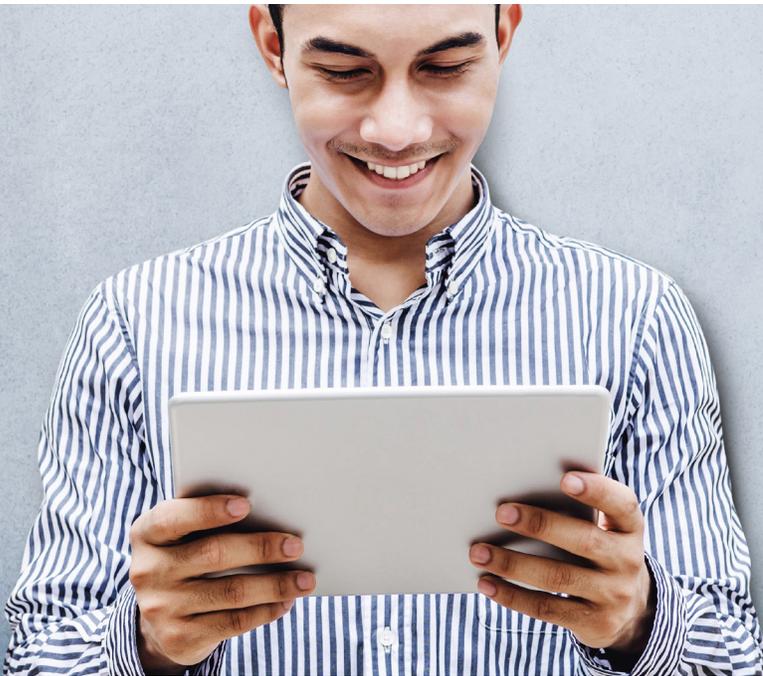
can mean looking for different skills during the hiring process and making training adjustments.

PROBLEM SOLVING – Again with more complex transactions, agents need to possess advanced problem-solving skills. Hopefully, they have tools available to them for help troubleshooting, but problem solving goes beyond tools usage. Agents require inherent skills to uncover the customer's underlying issue and work with the customer to resolve complex issues.

EMPOWERMENT – While it is the company's responsibility to empower agents to solve issues, agents need to be trained to know when they are empowered and how to act on that. They also need the confidence and skills to know when to leverage their ability to act "outside the box" when the situation warrants it.

ADAPTABILITY – As we have all seen, the world is changing almost daily, requiring all of us, including agents, to be adaptable to change. This is a characteristic that should be considered during the hiring process.

TOOLS USAGE – As agent tools become more involved and agents are asked to multi-task even more, agents need to be hired with ability to use multiple tools and trained to most efficiently use those tools to solve customer issues.

Key Takeaways

It is often more damaging to have a poorly executed self-help strategy than none at all. You may only have one chance to prove to a customer that your self-help capabilities actually work, and they will lose confidence quickly if it does not go smoothly.

Additionally, not only does a negative self-help experience contribute to a poor customer experience that is hard to recover from quickly, it has a negative impact on your costs and bottom line as well. So as you move into the second half of this year and prepare for holiday season, assess the performance and implications of your self-help strategy and ensure you have a well-thought out plan based on data, with the right processes, tools, hiring, and training approaches to support your overall strategy.

In short, do not let your self-help strategy sabotage your efforts to drive a better and more efficient customer experience. If you do what you say you are going to do, and do it well, you will be rewarded with customer loyalty, decreased costs, greater efficiencies, and a healthy bottom line.

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