

JANUARY 2022 | QUARTER 1



CX Insight

AN EXecs IN THE KNOW PUBLICATION

Making the Connection Between Employee and Customer Experiences

Creating happier customers by
creating happier employees.



CONNECTING THE DOTS
BETWEEN CX AND EX

STAYING AHEAD OF THE
CURVE WITH REMOTE
SITE AUDITS

BRAND SPOTLIGHT: ANGI

THE TOP FIVE CUSTOMER
TRENDS FOR 2022



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CX Insight Magazine
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Welcome to the January 2022 edition of CX Insight magazine, an Execs In The Know publication.

Putting people in focus.

There's no denying the direct impact of the employee experience (EX) on the customer experience (CX). This connection has never been more in focus than it is now with the continuing reliance on work-from-home and the deepening of The Great Resignation (also known as the Big Quit) which kicked off in spring 2021. Positive employee engagement and a welcoming company culture are key components, but that's just a start. In this issue, we look at what it takes to make the EX/CX connection, and we explore which companies are doing it well.

Moreover, in this issue, we welcome guest writer, Francisco Toledo, Director, Global Vendor Management and Instructional Design at Groupon who shares his thoughts on remote site auditing. Also, we look at the ins and outs of Messaging for customer service, learning about a handful of brands that are maximizing this

service solution which is often cheered by consumers.

And, that's not all – this issue also contains an insider's look at Angi through a special Brand Spotlight featuring Matt Zurcher, Senior Vice President, Customer Care, as well as a Q & A with George Bevensee, Vice President, Customer Experience at TVC Pro-Driver. As always, we hope you'll find these and our other articles to be both informative and inspiring, especially as you develop and refine your own future CX plans. ✨

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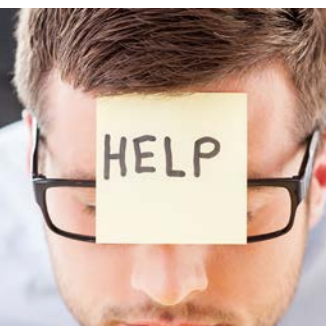
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Connecting the Dots between EX and CX

Putting an Emphasis on the Experiences of All.

By Execs In The Know



Most leaders will agree with the well-known saying, “Happy employees = happy customers.” This is especially true in a service environment where front-line staff represents the brand – they truly are the face of the organization. It is also true for all parts of the organization, from product development to marketing to supply chain and fulfillment. Every employee is a vital cog in the machine that strives to deliver on a brand’s promise at every point in a customer’s journey. If a cog is “compromised” in any way, the customer is impacted.

It goes without saying that staff who feel burned out, unappreciated, isolated, unsupported, unheard and “stuck” in their roles will not feel motivated or empowered to deliver exceptional customer experiences. If employees experience any of these feelings, companies will suffer from low productivity, retention, engagement and loyalty. And, this all leads to a poor customer experience.

Dissatisfied

Satisfied

There are many studies which support the connection between employee and customer experience, including a [study from Forbes](#), which found:

- Companies that excel at customer experience have 1.5 times more engaged employees than companies with poor customer experience.
- Seventy-nine percent of employees at companies with above-average customer experience are highly engaged in their jobs compared to 49% of employees at companies with average or below-average customer experience scores.

Many organizations aspire to prioritize the employee experience. But now, more than ever, it is critical for organizations to take these strategies a step further by making the connection between the employee and the customer, putting meaningful strategies in place to achieve the desired results.

In this article, we will explore examples of organizations that succeed in making this important connection, the common thread found in these examples and how other organizations can learn from these examples in their own environments.

Examples of Companies That Have Made the EX and CX Connection

The two examples explored in this article are companies that are well-known for their customer experience. When they are both examined, they have not only prioritized EX, they have successfully linked EX with CX in all that they do.

NORDSTROM

There have literally been books written about the Nordstrom culture and customer experience.

It all starts with their mission, which has been embedded in their culture since the brand was



founded in 1901. Among other things, [John Nordstrom said](#), "Our commitment is 100% to customer service. If I'm a salesperson on the floor and I know that the people who own this place are committed to customer service, then I am free to find new ways to give great customer service. I know that I won't be criticized for taking care of a customer. I will only be criticized if I don't take care of a customer."

While wording may have changed over the years, the company's over-arching mission and vision have not, and incorporates a focus on the employee as well.

In fact, the [Nordstrom mission statement](#) is,

"To provide outstanding service every day, one customer at a time. A further focus is provided to Nordstrom employees at all levels with this Nordstrom goal, which is also a management mission. We work hard to make decisions in the best interest of our customers and those serving them."

Expanding on this, the company has been quoted saying that their goal is to

“Provide a fabulous customer experience by empowering customers and the employees who serve them.”

As explained in the article quoted here, the company has not always been immune to challenges. They faced labor disputes in the 1990s, but they faced it head-on and increased its focus on fostering the culture that has always been prioritized – one of collegiality, respect and personal growth. This renewed focus succeeded in driving employee satisfaction and, ultimately, substantial company growth.

In short, Nordstrom strives every day to make customers feel good and create lifelong relationships with customers. These relationships don't just happen – people make them happen; and the company clearly recognizes this and makes the employee part of its overall vision to deliver on its brand promise.

STARBUCKS

Starbucks is another example of a company which consistently appears on lists of “best customer experience.” And, consistent with Nordstrom, it all starts with the company's vision and how that impacts everything they do.

The company clearly states their philosophy, mission and vision on their website:

Expect more than coffee.

“From the beginning, Starbucks set out to be a different kind of company. One that not only celebrated coffee, but also connection. We're a neighborhood gathering place, a part of

your daily routine. Get to know us, and you'll see: we are so much more than what we brew. We call our employees partners because we are all partners in shared success. We make sure everything we do is through the lens of humanity – from our commitment to the highest-quality coffee in the world to the way we engage with our customers and communities to do business responsibly.”



“ ... everything we do is through the lens of humanity — from our commitment to the highest-quality coffee in the world to the way we engage with our customers and communities to do business responsibly.”

Its mission is to:

“Inspire and nurture the human spirit – one person, one cup, and one neighborhood at a time.”

Further, the company's core values support this mission by saying:

With our partners, our coffee and our customers at our core, we live these values:

CREATING A CULTURE OF
WARMTH AND BELONGING,
WHERE EVERYONE IS WELCOME.



DELIVERING OUR **VERY BEST**
IN ALL WE DO, HOLDING
OURSELVES ACCOUNTABLE
FOR RESULTS.



ACTING WITH **COURAGE,**
CHALLENGING THE STATUS
QUO, AND FINDING NEW WAYS
TO GROW OUR COMPANY AND
EACH OTHER.



BEING PRESENT, CONNECTING
WITH TRANSPARENCY, DIGNITY,
AND RESPECT.

We are performance-driven, through the lens of humanity.

Starbucks' mission and values are not just words on a website. The commitment to customers and internal partners (employees) is evident in recent investments it made public.

In a recent announcement, Kevin Johnson, Starbucks president and chief executive officer, said, "As Starbucks celebrates our 50th anniversary, we are reminded that our heritage is based on the simple concept that our green apron partners are the heartbeat of Starbucks, and that success is best when it's shared. Today,

we are announcing another historic investment in our partners, knowing that when we take care of our partners, they take care of our customers, and all stakeholders benefit. This is how we continue to build a great and enduring company, one that is committed to the ideal that doing good for one another – and for society – is good for business over the long-term."

The significant investments announced are all centered on the partner (employee) and include:

SIGNIFICANT WAGE INCREASES to recognize and reward tenured partners while also increasing minimum pay

TRAINING AND RECRUITING to reward referrals, adding recruiting specialists, in-store training

NEW TECHNOLOGY AND EQUIPMENT to make it easier for partners to handcraft beverages and focus on connecting with customers

STORE PARTNER HOURS with a focus on forecasting capabilities to improve store staffing, testing a shifts application so partners have the ability to work shifts that meet personal needs

PARTNER-CENTERED INNOVATION with a team brought in to design and test initiatives to improve the partner experience and reduce complexity

Clearly, the strategies and investments being made support their vision and focus on supporting their partners to deliver on the company's promise of creating exceptional customer experiences, developing customer relationships and being an important part of communities.



Embed a Connected Culture

Connect Strategies to the Mission

Common Link Connecting EX to CX

Why shine a light on these two examples? What do they have in common that other organizations can learn from?

There are two simple themes that are evident when examining these examples and why they are successful at linking EX to CX.

Both organizations:

WHAT DOES THIS MEAN?

EMBEDDING A CONNECTED CULTURE

It starts at the top. Both organizations have a mission, vision and values that clearly state the focus on “developing customer relationships” and “enabling and empowering employees” to deliver on those relationships. These are not just words on a poster in a conference room or featured on the companies’ websites. Customers see and feel these values in their interactions with these brands. Yes, product quality is important – customers expect it, value it and experience it. But, product is not the focus of the mission statements of either company – it is about the relationships. While product quality is important, the emphasis on creating the best customer experience every day is the focus. This cannot happen without creating a culture that empowers, enables, supports, values and satisfies employees who directly impact those customer relationships.

CONNECTING STRATEGIES TO THE MISSION

A clear mission and vision which connects the dots between EX and CX is just the first step. Both companies back that up with strategies, investments and initiatives. Take Starbucks specifically as an example – the company’s recent investments are primarily focused on employees. Yes, some of these will likely reduce costs by improving efficiencies, but some of them also may technically increase costs in the short term (i.e., wage increases). However, the company clearly recognizes that investing in areas that will directly support employees’ abilities to connect with customers will create those experiences that drive long-term loyalty and, ultimately, greater company success.

How to Connect the Dots Between EX and CX

What steps should companies take to ensure they are making the connection between EX and CX?

ENSURE MISSION AND VISION CLEARLY FOCUS ON THIS CONNECTION

Again, it all starts at the top, and it should be clear throughout the organization that the company recognizes the importance of EX in delivering a superior CX. Department mission and vision statements should also support the company’s mission. For example, how does the contact



center support the company's overall mission in making this connection? Every department and employee need to understand how and why their role matters.

EXAMINE AND ALIGN INTERNAL STRATEGIES AND INITIATIVES

Take a hard look all areas to determine if strategies are aligned with the mission. This includes:

HIRING / RECRUITING



Effective hiring and recruiting is critical in making the EX and CX connection. So, organizations must ask themselves the following: Is the organization looking for individuals that have the skills and characteristics that support the mission? Are expectations being clearly communicated during the hiring process? Are the company's values on display in the recruiting process?

TRAINING, DEVELOPMENT, AND GROWTH



To retain employees and ensure skills continue to evolve to meet customer expectations, organizations must ensure training and development programs allow for growth. If organizations want long-term customer loyalty, they must also strive for employee loyalty. Employees will stay where they feel connected, supported and can grow.

RECOGNITION



Employees want to feel valued. They want to know that what they do matters and is appreciated. Formal and informal recognition programs from not only direct managers, but senior leadership, fosters a deeper connection internally and, ultimately, with customers.



EMPLOYEE EMPOWERMENT AND ENABLEMENT

Most employees want to do a good job. They want to help customers, and they want to help their company succeed. To do so, companies need to take a hard look at how empowered their employees are to create better customer experiences. Are their hands tied by policies or processes? And, do they have the tools and resources needed to deliver on those experiences?



CLEAR GOALS AND METRICS

Nothing creates more confusion or ambivalence than goals or metrics that do not make sense, are not realistic or are not aligned with the mission. Organizations must ensure that goals and metrics are aligned, clearly communicated and consistently reported. Most important, employees need to understand the WHY of each metric and how it impacts the customer and business success.



DIVERSITY AND INCLUSION INITIATIVES

There has been increased emphasis on diversity and inclusion initiatives, and this is important not only to employees, but customers. Customers want to know they are interacting with a company that values and prioritizes diversity and inclusion. And, employees want to feel that the company works hard to create a culture that fosters both.



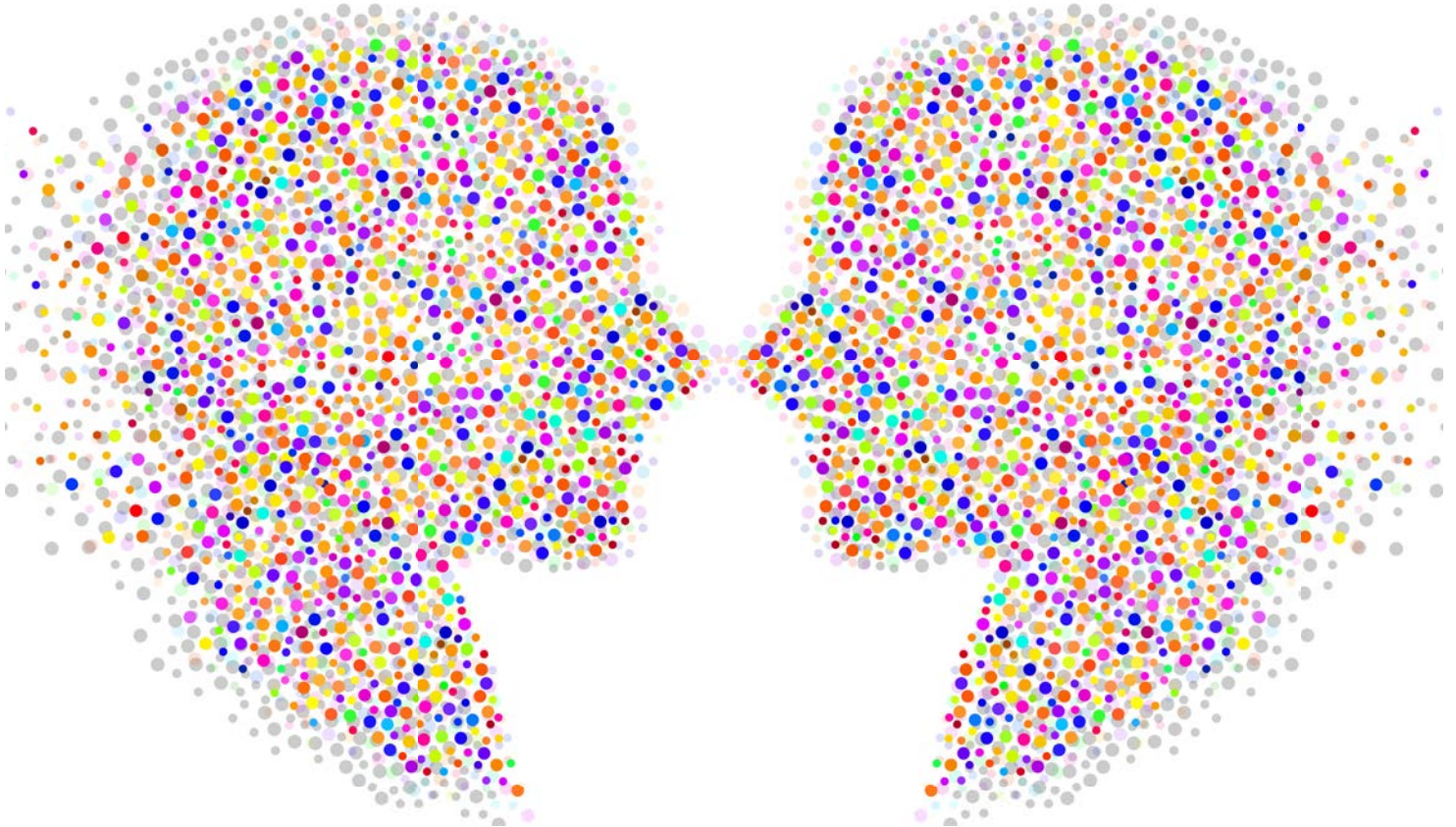
CORPORATE SOCIAL RESPONSIBILITY

Today's workforce cares deeply about a company's value system. They want to feel like they are not only contributing to a company's bottom line, but also to a greater purpose. Customers also pay attention to how organizations support community, the environment and the greater good.



COMMUNICATION AND TRANSPARENCY

This applies to both employees and customers. Trust matters, and trust can be eroded quickly with poor communication and lack of transparency. Employees want to understand the good, the bad and the ugly so they can be part of the solutions. And, employees need to feel like they are equipped with information to be open and honest with customers as well. It goes without saying that transparency with customers is critical – whether customers interact with an agent, a website or a bot ... and regardless of where they are in their journey with the brand. They expect clear and honest communication.



CONSISTENTLY COMMUNICATE HOW STRATEGIES AND GOALS SUPPORT THE MISSION

As new initiatives are launched, it is important to communicate to staff the “why,” and the impact it will have on both the EX and CX. By consistently making this connection, organizations will have greater buy-in, and employees will have faith that the organization is truly “walking the walk,” and values the importance of EX on CX. As in the Nordstrom and Starbucks examples, employees clearly understand why what THEY do matters and, in turn, feel empowered to deliver on the experiences valued by the company and customers.

Conclusion

In summary, delivering on CX has long been a competitive differentiator and now, more than ever, this is true. Leading companies recognize

that gaining the trust and long-term loyalty of customers is no longer solely impacted by product quality. The end-to-end experience is critical, from the shopping experience to customer support and everything in between. So, every employee has a direct and real impact on that experience. Organizations that understand the link between EX and CX and take thoughtful action to ensure culture and strategy connect the two will come out on top. ✖



GROUPON

Staying Ahead of the Curve with Remote Site Audits

by Francisco Toledo, Director, Global Vendor Management & Instructional Design

Nowadays, vendor managers are expected to wear many hats. They act as contract experts, ruthless negotiators, spend managers, stakeholder managers, and even operational managers. Of these many roles, the one that has been most disrupted during the pandemic is the role of operations auditor.

In the BPO industry, site audits (also known as site visits) help vendor managers better understand the performance drivers behind a contact center's qualitative output, process adherence, and/or efficiency expectations. They are also leveraged as a way of building relationships with the team that sits on the frontline.

This is the way it usually works: Vendor managers travel to the location and perform

a series of actions that include interviewing operational managers, team leaders and agents, shadowing agents on the job, and reviewing evidence of process and reporting implementation – all with the ultimate goal of understanding the “how” behind a specific output.

However, the efficacy of such an audit will really depend on how well vendor managers are able (and willing) to dive in to perform this list of actions. One of the common mistakes that can be made with site audits is being shepherded by the BPO into a conference room with a pre-established agenda that relies heavily on their senior management flying in to impress the group, despite not really having been a part of the site's operation. The only method of site audits we've seen work well are the ones where

vendor managers really dive into the operation and, increasingly, choose to execute surprise visits rather than a planned-in-advance trip, although these no longer need be in person. This often means leaving the social dinners and pre-planned free side trips as potential relationship building activities for another time.

Maximizing Returns

The industry has also shown that while the costs tied to site audits are relatively similar from

cause analysis experts will require several future iterations and a large amount of investment.

But, what happens when Vendor Managers are no longer allowed to visit sites? Or, more important, what happens when the slightest attempt to visit a site creates a tangible health risk to everyone involved?

Enter the Pandemic

With a lockdown and stay-at-home orders that have, in some cases, lasted more than

one-and-a-half years, many vendor management organizations (VMOs) that heavily relied on site audits have been forced to come up with creative ideas to understand more fully what is happening (or not happening) in their outsourced operations.

Those businesses that were behind the curve, however, found themselves in an insurmountable situation. And, not surprisingly, if an organization is already yielding little tangible value from site audits, how can they expect a successful transformation toward an approach that now has become fully remote?

company to company (airfare, transportation, accommodation, etc.), returns can vary enormously. Ultimately, it's fair to assume these costs should be tied to some level of return. In a sales-driven environment, this can be realized as higher topline performance by the sales representatives, while in a service environment, this can mean a more efficient operation that either surfaces a cost-reduction opportunity or improves customer-facing key performance indicators (KPIs).

Some organizations are still at the beginning of the curve when it comes to executing site audits that achieve this return, as opposed to just adding costs. That doesn't mean they can't get there, but unlocking the full potential of their vendor managers by developing them into root

At Groupon, our VMO was in the middle of the curve when the pandemic hit. Our group of vendor managers had recently completed COPC Standards Certification and our partners were in the process of doing the same for their key operational leads. This meant that we were all speaking the same language, and some vendor managers had already traveled to a few of our locations following COPC Standards Certification for root cause analysis and performance improvement. This meant visits without warning and heavy shadowing of frontline staff, among other hands-on initiatives. We were happy about the results and felt increasing the number of visits might be a good thing to do in the near-term as a



way of accelerating the vendor's performance improvements.

As soon as we realized these actions would not be an option in the short- and mid-term, the group quickly regrouped and started thinking of ways to continue the success of the audits – only this time, in a remote environment.

Going Remote with “Surprise Visits”

The remote audit implementation wasn't difficult, since the pandemic accelerated everyone's access to one or more chat and conference call tools. The VMO started meeting in virtual rooms with frontline agents, and shadowed them through screensharing. The first iterations were bumpy ... agent internet connections were not always the best, and managers would often “shadow the shadowing” which, naturally, inhibited agents being able to be forthcoming. In addition, and because we were relying on management to set up the connection initially, the business process outsourcing (BPOs) partners would also cherry pick the best performers for shadowing sessions.

After bringing this up to our partners, they quickly enhanced their workforce internet accessibility beyond our contact management tools requirements. Vendor managers took a more proactive approach on setting up these sessions; they owned agent selection based on data analysis (executed prior to the site audit) and no longer allowed management to decide who and when. This was particularly effective, thanks to the fact that our Workforce Management (WFM) team owned the schedules and, thus, the data around who would be working and when. We immediately noticed that agents were more relaxed, naturally engaged (as opposed to over-engaged) and more eager to share evidence around their struggles. We felt this was a natural consequence of them not feeling panicked due to the anticipation and

“direction” given by their team leads, as well as the fact that the frequency of shadows had increased substantially, turning the activity into something routine and familiar for them.

As these shadow sessions became more and more revealing, we noticed that the actions taken by our partners (as a consequence of the evidence gathered by vendor managers) were not just fixing operational defects, but were also driving up ESAT as the real concerns and challenges of working in a remote environment were being effectively addressed.

However, with a higher inventory of findings every week, vendor managers also faced their first challenge: time management.

Turning Remote Site Audits Into Actions

The way a physical site audit was prepared in the past involved silent research around our full sets of data. We would then compile a block of potential improvement areas to investigate, limited to what the duration of the on-site audit would allow, as time on-site determined what vendor managers would be able to dig into. The onsite audit would then facilitate a deep dive exercise into those areas – a way of ensuring that our partner was doing things the way we needed them to. Once VMs were back home, they'd allocate one to four weeks to debrief on their findings and coordinate the execution of actions aimed at driving improvements with relevant stakeholders, including the BPO partner. While doing this, they'd clean their calendars, deprioritize non-critical events, and level expectations around their availability with stakeholders that were not involved.

With the remote audits/shadowing sessions moving from a schedule of specific points in the year to a scattered approach occurring weekly, vendor managers quickly ended up with a large list of items they felt were critical for the

business. This forced vendor managers to take a step back and build a plan around prioritizing items based on their potential impact.

Weekly meetings with stakeholders and leadership were set up to support the new approach. These helped enormously, as the business was exposed to these findings in real time, resulting in natural, collaborative prioritization led by the VMO.

After a few months, the long initial list of findings was cleared, and vendor managers were able to get into a rhythm in which they would be able to tackle some of the new discoveries right away (sometimes even on the same day) and leave room for the next priority. In the same way, time invested in preparing these shadowing sessions dropped from weeks to one or two days, and sessions started happening as part of their daily tasks. We were no longer compiling lists of reasons why things were not happening, but instead, a list of issues we had not even imagined were there. We were exploring uncharted territory.

The overarching feeling in our current group of vendor managers is that they're not just equipped to see through our partners' data and pinpoint potential improvement opportunities, they are also ready to follow those hunches and see them through with a lean approach that either 1) quickly reveals areas of work or 2) leaves enough space to move on and focus on the next lead.

I like to think that, as Aristotle said, "We are what we repeatedly do. Excellence, then, is not an act, but a habit." In that sense, the biggest learning our VMO unlocked from facing a challenge like COVID-19 was to never lose focus on what matters the most: Our partners' ability to deliver. By focusing heavily on this one thing, we allowed ourselves to get creative and come up with ideas to keep the operations running. This is true for many other organizations that were already yielding positive results from their

visits when the pandemic first struck. For them, relationships between vendor managers and a location's leadership were heavily based on performance rather than client satisfaction. This took direct and well-established communication between the VMO and those who were on-site managing and leading the frontline staff.

Keeping these efforts within the operations as a regular habit (versus being a part of a one-time transformative initiative) is probably the best way to empower the team to be able to quickly pivot and adapt in the face of an unforeseen challenge, especially one as big as a worldwide pandemic.



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Messaging: Service at your Customers' Fingertips.

by Execs In The Know

Customer expectations are shifting faster than ever. The pace of dramatic change in needs, perceptions, expectations, and behavior across the customer lifecycle is unprecedented. The blistering speed of digital adoption over the past two years has contributed significantly to this changing landscape, upending the way customers expect to interact.

Customer experience (CX) leaders are expanding their digital customer service channels in response to these changing dynamics. Striving to ride the digital transformation wave and meet customers where they are, messaging has become one of the hottest channels in the

customer service landscape. Consider this: U.S. mobile users sent 2.2 trillion SMS messages in 2020¹. Yes, trillion. With that type of engagement in a communication channel, what better way to deliver seamless interactions with customers?

Whether you are just getting started with messaging or looking to ensure that your offering is the best it can be, this article is for you. It starts with an overview of messaging and popular technology platforms, and then explores the pros and cons, top considerations, and a few best practices of companies leading the way in messaging customer support.

Using Messaging in Customer Service

So, what is it, exactly? Customer service messaging is any text-based interaction aimed at resolving an issue using a messaging app (such as Messenger, iMessage, WhatsApp, Twitter), SMS/text, or a brand's app. Being virtual, this digital channel requires no face-to-face interaction or verbal communication; it is, however, human to human. This type of messaging is asynchronous; participants on both sides of the conversation have the freedom to start, pause, and resume at their convenience while retaining the history and context of the interaction. This channel may also be called conversational messaging.

Messaging apps are the most popular platforms that brands use to offer this channel as a way to connect to their customers. The top options include Messenger (formerly Facebook Messenger), iMessage/Apple Business Chat, Google Chat, WhatsApp, and Twitter. Companies also may opt to offer direct private messaging through a brand app or via SMS/text using the native functionality of a mobile device.

How Effective is Messaging?

Like all contact channels, messaging is not a perfect solution. Some brands report a few negative impacts when offering messaging as a contact channel. One of the most common is "channel mismatch." This occurs when customers use messaging for help with an issue that needs to be handled through a live support channel. Time-sensitive and complex issues that require escalation are not the best choice for this channel; similarly, contacts that require information that messaging agents do not have access to also are better served in another channel. However, customers do not understand internal process flows, and

are trained to reach out on the channel that works best for them. Avoiding this takes effort to re-educate customers and a process to get the customer to the right place as quickly as possible.

Alternatively, many CX leaders argue that the positives far outweigh the negatives. Some of the merits of conversational messaging in customer service are:

TRUSTWORTHY

The entire interaction occurs in a branded, verified, post-authentication environment, making it safe and secure for both the organization and the customer.



CONVENIENT

Customers no longer have to wait on hold for a live agent. Instead, messaging conversations can take place intermittently, giving customers the freedom to start, stop, and resume the conversation as it suits them. And these interactions occur in a way that allows customers to multitask using their mobile device.



CONTEXTUAL

Messaging enables a written record of the entire conversation right in the thread, visible to both the customer and the agent. This record contains the history and context of the conversation, allowing for a more valuable interaction and faster resolution.



EFFECTIVE

Messaging allows for asynchronous, personal, and immediate communication between a customer and an





agent. Either party can share links, photos, and emojis, which can deepen the connection and increase the effectiveness of the interaction.

With these advantages in mind, it is easy to see where messaging excels, from both the customer and the brand perspectives. For instance, messaging can help companies improve response times and provide better CX often while improving standard key performance indicators (KPI), including satisfaction, cost per contact, and agent productivity. Offering a messaging channel can deflect some phone contacts, freeing up agents in that queue for more complex and time-sensitive interactions. Like some other channels, the messaging queue is easily scaled based on volume and other operational considerations, but generally at a lower cost. Overall, messaging works well to engage customers across their entire journey. From discovery, engagement,

transaction, support, and re-engagement, messaging is a platform that can deepen engagement with customers, making the interactions more personal, customized, and convenient.

Optimizing the Messaging Channel

It's not surprising that the messaging channel is growing so quickly. Let's explore some considerations to help get started with messaging as a contact channel or just make sure the channel is performing at its best:

DESIGN THE JOURNEY FOR CUSTOMERS AND FOR EMPLOYEES.

Journey map the key use cases where messaging allows the organization to deliver the best customer and employee experiences. Once you have mapped the ideal journey, use the learnings to inform the research,

development, and launch of the messaging channel. This journey map should also guide training, process, workforce management, and other groups involved in the channel.

UNDERSTAND HOW YOUR CUSTOMERS WANT TO INTERACT WITH YOUR BRAND.

Fielding a touchpoint study that identifies customer preferences is an easy and effective way to accomplish this. Looking at the data by customer segments and demographics can help deepen this understanding and inform decision-making.

AVOID SELECTING THE TECHNOLOGY FIRST.

Instead, identify your use cases and define the business requirements. From there, you can select and implement the technology solution that best fits your needs.

ENSURE THAT INTERACTIONS ARE CONSISTENT WITH YOUR BRAND VOICE.

Like other channels, the language, style, and tone of an interaction delivered in the messaging channel should be consistent with the overall brand experience. Engage your marketing colleagues to help craft the interaction protocols for your agents to use in this channel.

CREATE TRAINING THAT EMPOWERS AGENTS TO WORK WITH ACCURACY AND SPEED IN CONCURRENT SESSIONS WITH CUSTOMERS.

This training should mirror what agents will experience with messaging communications. It also should identify ways to bring the brand promise to life in all interactions, as well as transfer protocols for channel mismatch scenarios.

EXPERIMENT WITH AGENT PRODUCTIVITY METRICS.

Create a small agent team to help determine the optimal number of concurrent messaging interactions. Balance efficiency with

effectiveness to set the standard based on actual data and testing with this agent team.

START SMALL AND ADJUST AS NEEDED.

Limit usage to a small group of customers, track channel performance, and make adjustments accordingly. This will help minimize risk while collecting actual data to inform your operational metrics and workforce modeling.



DON'T LAUNCH IT AND FORGET IT.

Continue to monitor the channel, measure its success, and optimize its operation. Include metrics and targets in your KPI scorecard to monitor performance over time and in relation to other channels.

Brands Using Messaging Successfully

Applying the considerations discussed above, careful planning, and customer adoption, many brands are creating memorable CX using messaging as a customer service channel. Let's take a look at a few.



APPLE

Much like its other products, Apple used [iMessage](#)² to reimagine its user experience for customer interactions. To help reduce incoming contacts, Apple customers can receive proactive SMS messages from the company for things like an upcoming Genius Bar appointment. Apple advertises its messaging functionality as making “connecting with your favorite companies as easy as texting your favorite people.” Apple not only uses its technology to improve its own CX, but it also sells [Apple Business Chat](#)³ to other companies, including Discover, Four Seasons, Lowe’s, and many others.



DELTA

[Delta](#)⁵ was the first airline to use a messages app via Apple Business Chat to connect with its flyers. The option to message from an iOS device allows customers to connect with a live representative to receive in-the-moment assistance. This real-time assistance can be critically important to a traveler facing flight delays, travel changes, or information that provides a lifeline when customers need it most.

To: 83372

[Details](#)

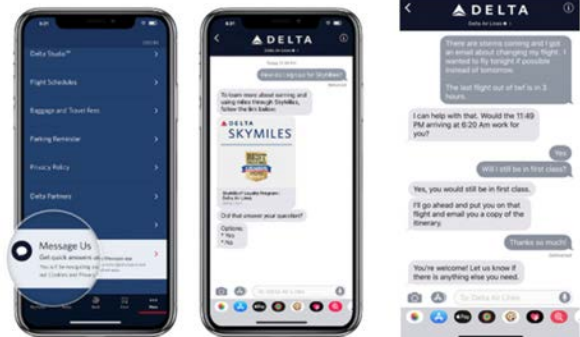
SMS with 83372
8/3/21, 11:49 AM

Reminder for your Genius Bar Reservation on Tuesday, August 3, 2021, 3:05 PM.
To view, cancel, or reschedule:

Get Support
[apple.com](#)



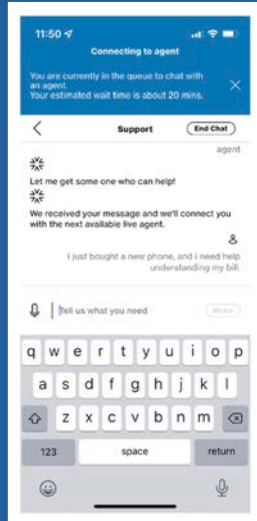
Reply "1" to cancel your reservation at any time.





VERIZON

Within its app, Verizon⁴ has extensive customer support options via text. Verizon customers can text with agents to receive help on a variety of issues, from account updates to billing questions. A particularly effective use of messaging is troubleshooting phone issues: agents can communicate with customers to resolve issues when making a phone call is not possible.



WARBY PARKER

CRATE & BARREL AND WARBY PARKER

Retailers like Crate and Barrel⁶ and Warby Parker⁷ are also using text to help customers answer merchandise questions, inquire about product availability, and check the status of existing orders. This strategy helps reduce contacts in other channels and empowers the customer to be in control. Both companies prominently display the availability of text as a contact channel on their websites, making customers aware of this option and allowing them to easily take advantage of this channel.

Need a hand?

We're available by phone (888.492.7297) and chat every day from 9 a.m.–10 p.m. ET.



FAQ



Text



Chat



Email



Call

Can I speak with someone about my order?

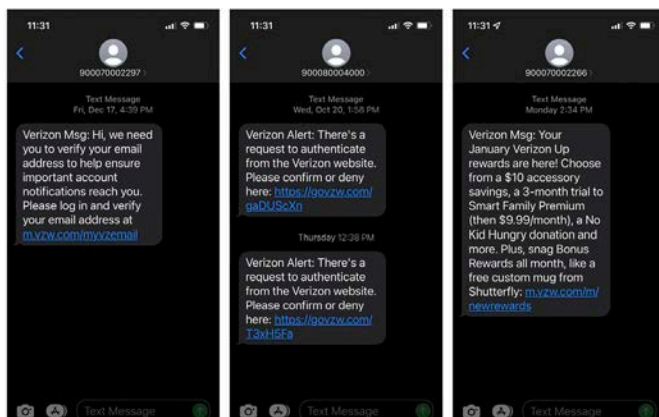
Of course! We're here to help from 9 a.m. to 10 p.m. ET every day of the week. Here's how to get in touch:

Text us: **646.233.2186**

Chat us: **live chat** (Note: You may be directed to our Help Center if all advisors are busy helping customers)

Email us: **help@warbyparker.com**

Call us: **888.492.7297**





Why Use Messaging?

Today's customers demand real time, hyper-personalized, one-on-one communication via contact channels they prefer. With penetration and reliance on mobile phones at an all-time high (and growing!), messaging is a great way to deliver interactions that please customers. Using messaging, CX leaders are delivering quick and easy resolution in a safe, secure environment – a win for both companies and customers. As customer expectations continue to evolve, organizations can rely on messaging as a powerful channel to ensure a seamless CX. The best digital customer service approach works to build and strengthen a deep connection between customers and the brands they favor. In this relationship, the brand treats the customer as a real person with a name, a history, and a value to the company. Messaging is a powerful tool for CX leaders striving to deliver

seamless experiences that keep customers delighted with the service they receive and loyal to the brand. 🌟

Links:

- 1 <https://www.statista.com/statistics/185879/number-of-text-messages-in-the-united-states-since-2005/>
- 2 <https://support.apple.com/en-us/HT206906>
- 3 <https://www.apple.com/ios/business-chat/>
- 4 <https://www.verizon.com/support/contact-us/#mobile>
- 5 <https://www.delta.com/us/en/need-help/overview>
- 6 <https://www.crateandbarrel.com/customer-service/>
- 7 <https://www.warbyparker.com/help?a=O.K.-I-still-need-some-help.-Could-I-get-some-one-on-one-assistance---id--HecNdrpZQXmo7TKDfqSLgg>

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VIRTUAL BRIEFINGS

Thurs., March 24: The CX & EX Connection

Thurs., May 19: Outsourcing

Thurs., August 4: Messaging

Thurs., December 1: Outsourcing

We sincerely look forward to getting everyone together again to advance the conversation on all facets of the customer experience, via:

KEYNOTES

Get a sneak peek into what other corporate CX leaders are doing to innovate.

PANELS

Gain relevant corporate brand perspectives on hot topics.

WORKSHOPS

Interact, problem solve, and gain some actionable takeaways.

SHOP TALKS

Take a deep dive into some of the world's most progressive solutions on hot topics in this interactive meeting format.

AND MUCH MORE!

Mon., October 24–Wed., October 26

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Hotel del Coronado
Coronado, CA



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at execsintheknow.com/events/



Execs In The Know



BRAND SPOTLIGHT

Angi

Helping people love where they live.

An interview with Matt Zurcher, Senior Vice President, Customer Care at Angi.

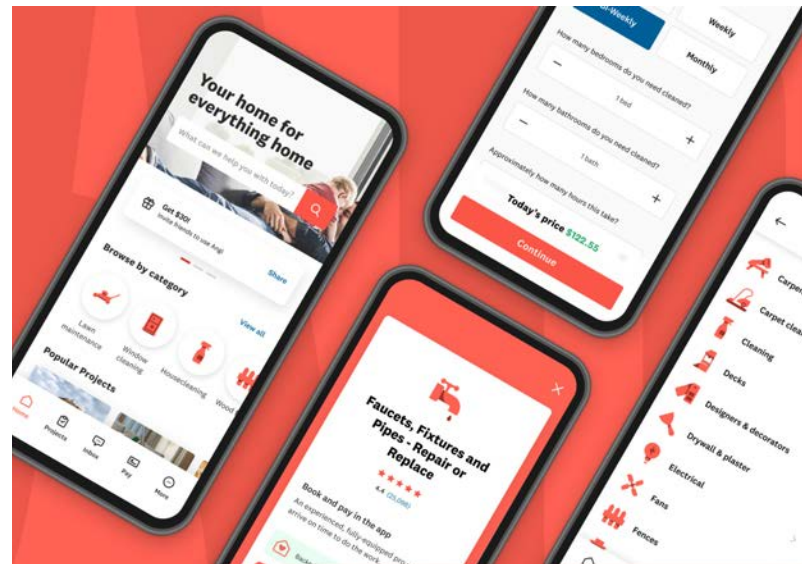
For more than two decades, Matt has found a home at Angi – the home-for-everything home – guiding his team through numerous transformations, big and small. Matt is passionate about not just the customer experience, but the employee experience as well. In late December 2021, we had a chance to put a few questions in front of Matt, helping us get to know both Matt and Angi just a little better.

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

Matt Zurcher: I've been at Angi so long (21 years), it's hard to remember how I got here! For the first eight years after college, I was a Surface Warfare Officer in the Navy. Then, after a brief stint at a sports marketing firm, I joined Angi which, at that time, was ServiceMagic. I started my journey with Angi as a Partnership Manager. In my 20+ years at Angi, not only has the company grown and evolved, so has my role within the organization. I now serve as the Senior Vice President of Operations for Angi.

Like most organizations, the Operations Team at Angi handles many different tasks, so my day-to-day focus can vary quite a bit. Sometimes, it's working through issues with our inbound care teams, and sometimes it's working with our outbound teams, outsource partners, or quality and customer satisfaction group. The day-to-day variety is one of the reasons I love my job.

On a broader scale, my day-to-day focus is on customer satisfaction across all touchpoints, financial obligations and service improvements, including potential technology enhancements. At Angi, we have a mission to help people love where they live, and my team plays a large part in making that mission come to life. We all work to live our mission, so a lot of the time I just get out of the way and let my amazing management team make



things happen, serving our pros and the millions of homeowners that turn to us.

EITK: Angi is a home services marketplace leader resulting from the 2017 merger between two once-upon-a-time competitors, Angie's List and HomeAdvisor. Can you describe a little bit about what Angi offers and how the company has evolved since the merger, especially with respect to company culture and the customer experience (CX)?

Matt: Angi's mission is to help people love where they live. In addition to merging with Angie's list, we also acquired Handy in 2018. After operating



Angi

MATT ZURCHER

Senior Vice President,
Customer Care



as different business units and brands, last March, we re-branded, bringing everyone under the same name, Angi. Combining the companies and the models have allowed us to offer homeowners the ability to accomplish their home projects in a variety of ways. Here are the choices you have through Angi:

- You can choose a professional from a directory, reading real, vetted reviews from actual customers.
- Angi can match you with a professional based on your location and project.
- Or, you can book a project directly from Angi. We give you a price up-front, and you book and pay Angi. We then do the rest, starting with finding a top-rated pro to complete the project – all backed by our Happiness Guarantee.

With respect to company culture, it has been an evolving exercise. This year, we created a new mission statement as well as new values. Those will both help shape the company culture and be the guideposts we use going forward. However, the pandemic has made building and maintaining our culture challenging. To help build culture in a virtual environment, we are far more intentional with it than when we were working in an office. Like a lot of other leaders, we are learning as we go.

EITK: Angi is unique in that it serves both end users (homeowners) and service providers (contractors). What challenges does this pose to Angi's CX operations, and how are these challenges tackled?

Matt: The marketplace we live in can be difficult – lots of people to satisfy – and, when you add in the fact that we have various ways to use our marketplace, it can become quite complicated. But at Angi, our first value is, "Start with the Customer." For an operations team, this puts us in an amazing position where we have the backing and support of the whole organization. For us at Angi, CX is not an afterthought, it's the first thought.

From the CX operations perspective, some processes are harder than others. For the processes that are unique to one customer, whether a homeowner or service professional, most scenarios are pretty straightforward. When a scenario overlaps both of our customers, there can be more complexities.

For me, there are three keys required to tackle these challenges. First, you need advisors who can communicate with service professionals and consumers – and those two groups are very different from their needs to their understanding of the home, and more. Second, you need a CRM that can handle these complicated scenarios. Over the last 20+ years, we have continuously improved our internal CRM system to the point that these processes are now pretty intuitive. Third, communication is key. Internally, the CX organization cannot be siloed – each group must know where there might be overlap and, furthermore, know who to talk to in case there are questions.

EITK: Combining such well-established companies raises some difficult questions in terms of branding and technology. What was Angi's approach here, and what was the impact on CX operations? How have things been working out?

Matt: We've actually been "combining" for the last several years, which has been hugely beneficial as

we embarked on our rebrand. Instead of rushing into combining all aspects of the business, we have been taking a thoughtful approach. Operations was one of the first areas where we started to coordinate and overlap teams. In late 2017, we combined with Angie's List and, in 2018, Handy came into the fold. I think the learnings from those two efforts helped us when we transitioned to Angi. This transition was more involved, because we created one homeowner app and focused on a unified company name, Angi.

Combining organizations is difficult, especially when you are bringing together organizations that have been around for more than 20 years. But because we had been working on this for a while, the final consumer-facing transition was more seamless than anticipated. Through the lens of CX, I thought re-branding and informing our customers about the changes would be difficult, but that turned out to be fairly straightforward. We had good training ahead of time, and we provided scripts that were simple and easy to digest.

The difficult part is blending CX teams and processes across three companies. With the brand change, we wanted homeowners to think of Angi when they need repairs, improvements, and any other type of work done to their homes. Additionally, we wanted pros to think about Angi as a way to build and grow their business, finding in Angi a partner for their business.

To deliver on that, pros and homeowners need to be able to get customer service help easily. HomeAdvisor, Angie's List, and Handy historically worked off different platforms and had different processes. Since the rebrand, we have made steady progress in unifying these platforms and processes. Our ultimate goal is to have one CRM tool, but until that happens, we have cross-trained advisors on all platforms so they are able to answer questions, regardless of the issue.

EITK: Keeping employees happy and engaged is tricky, even in the best of circumstances let alone during a major merger and a pandemic. What are some of the things Angi does to keep ESAT scores where they need to be among CX support staff and frontline agents?

Matt: I believe happy employees results in engaged employees. The brand change we did last spring was exciting. It wasn't hard to keep people engaged and excited during that transition. They knew they were an important part of the change.



The more challenging issue that impacted employee engagement and happiness was the global pandemic. It has not been easy, but below is a list of things Angi did to keep ESAT scores high:

1) Be Mindful of Communication – What historically had been easy suddenly became difficult. Keeping people informed is a lot more difficult when you can't casually gather people together or walk to a manager's desk to share information. Virtual communication must be more deliberate, more repetitive, and just more in general. When we pivoted to remote work, we instituted some important communication forums, like consistent fireside chats with the senior leadership team, office hours with leadership, and roundtable conversations between senior leaders and advisors. That allowed for more two-way communication where important company updates could be shared by all, and issues and frustrations could quickly be raised and addressed.

2) Revisit and Improved Team Benefits –

- a. During the pandemic, Angi instituted a policy that all employees get a free holiday. Each person can select a holiday that is important to them and take that day off.
- b. Angi also implemented an Equity-For-All program. One of our values is, "Be an Owner," so this fit hand-in-glove.

3) Celebrate, Even if It Looks Different Than It Did Before – We have always done a lot during Customer Service Week, and during the pandemic,

we didn't stop. Since we couldn't all celebrate together, we had to improvise. We delivered gifts to advisors' homes. We had drive-by celebrations, and we had a blast celebrating virtually. Our management team truly rose to the occasion and created a great week of recognition.

The numbers prove out that these actions have been successful. This year, attrition has been the lowest in two years, and our manager satisfaction scores were over 90%.

EITK: Undoubtedly, a tremendous amount of work went into the successful rebranding launch of Angi in March 2021. But, surely, the work is not done. What remains, and where will you be focusing your efforts most in the next 6-12 months?

Matt: Our first value is, "Start with the Customer," so we will continue to work tirelessly to help our consumers "love where they live," as well as help our service professionals grow their businesses.

In general, I think our mission statement really expresses where our efforts will be focused. It is this: "We believe that home is the most important place on earth. That's why we're on a mission to help people love where they live. We'll do this by becoming the home-for-everything home."

EITK: You have been an active member of the Execs In The Know community for a long time. Can you share what your involvement in the community has meant to you?

Matt: I don't attend a lot of conventions in general, but ever since I met Chad and Susan several years ago, this has been a group that I've really enjoyed being a part of. The Execs In The Know conferences always have topics I find relevant and beneficial. Additionally, the people I've met at those conferences have been remarkably transparent and friendly. I have reached out to them for



advice, I have played golf with them, and certainly had a cocktail or two with them as well. Bottom line is that Execs In The Know is an organization that brings together the right people to discuss the right topics at the right time. I'm really excited that there will be another in-person conference in 2022. 🍷



Execs In The Know

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

Thank you to Matt Zurcher and the entire team at Angi for contributing to the Execs In The Know Brand Spotlight.

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

Contact us at info@execsintheknow.com.



The Top Five Customer Service Trends for 2022

Discover What's Coming Next from Research-Derived Insights.

By Sarika Khanna, EVP & Chief Product Officer, Medallia

The future of customer service is here, and brands that prioritize collecting customer feedback to improve customer satisfaction and put winning strategies in place to deliver an excellent customer experience stand to strengthen existing customer loyalty, attract new customers through positive word of mouth, and gain an advantage over the competition.

But, what are the best practices that set customer-first companies apart from the rest? For answers, our team at Stella Connect by Medallia commissioned a research study of more than 2,100 consumers in the U.S. and U.K. to uncover key drivers of customer sentiment, behavior, preferences, and loyalty. We published these insights on the future of customer service in our free report, [Customer Service Trends for 2022: Preparing for the Future of Customer Service](#),¹ which is now available to download.

To help your team prepare for the new year, make the most out of your CX investment and keep your organization ahead of the curve, here are five critical ways to meet today's customer service expectations.

Customer Service Trends for 2022:

Preparing for the Future of Customer Service

[Get the Report](#)



Five Research-Backed Insights on the Future of Customer Service

#1: Why It Pays to Invest in Efficiency

Accustomed to offerings like next-day delivery, one-click ordering, and 24/7 customer help lines, speed and convenience have quickly become key factors for success for brands today. And while this need for speed has evolved dramatically since the advent of social media and real-time conversations, the evolution of the omnichannel customer experience has not only led to today's buyers wanting fast responses on more platforms, but a desire – and expectation – for the entire process to be easy, too.

Gone are the days where consumers tolerated lengthy hold times, inefficient messaging tools, and drawn-out resolutions for their issues. In fact, despite there being so much focus on personalization and the criticality of building deep customer relationships with customers, it turns out that these aren't the most important facets of great service for consumers.

According to our research, both U.S. and U.K. consumers ranked **response time as what matters most to them when contacting customer service**. This was ahead of agent knowledge about products and services, overall time and effort needed to resolve an issue, personalized communication and resolution and, finally, agent tone and communication style.

What matters the most when contacting customer service?

1. Response time
2. Agent knowledge about products and services
3. Overall time and effort needed to resolve an issue
4. Personalized communication and resolution
5. Agent tone and communication style

Source: 2021 Stella Connect by Medallia survey of 2,100 consumers in the US and UK

What the above speaks to is the value of good training for customer service teams as they aim to **keep their customer effort score (CES) low and get to the root of their customers' issues quickly**. This is, after all, what today's consumers demand as they increasingly place higher value on quick resolutions than the opportunity to build better relationships with the brands they do business with.

Only 35%
of US consumers say they'd only wait up to
5 minutes for a customer service response.

SOURCE: 2021 STELLA CONNECT BY MEDALLIA SURVEY OF 2,100 CONSUMERS IN THE US AND UK

#2: The Importance of Balancing Speed with Quality

When you work in customer service, it can feel like you have to sacrifice quality for quantity, especially when your team is managing a high volume of interactions. True leaders, however, recognize the value in balancing empowering agents with the tools and training needed to handle customer inquiries not only with speed and efficiency, but in **ways that ensure quality brand experiences for the customer.**

After all, as shown above, customers rank agent knowledge as the #2 most important factor when interacting with customer services.



60%

of consumers across the US and UK say that they will stop buying from a brand after a poor customer service experience.

SOURCE: 2021 STELLA CONNECT BY MEDALLIA SURVEY OF 2,100 CONSUMERS IN THE US AND UK

In this environment, where many CS teams are having to do more with less, customers' plummeting patience is an even greater cause for concern – especially as consumer preferences, expectations and, now, tolerances fluctuate.

What we've seen over the last couple of years is that [customer service plays a major role in modern customers' buying decisions](#)¹ and, in 2022, the role of the customer service agent is only going to grow in importance.

With less room for error and patience waning, it's clear that organizations are operating under challenging circumstances to ensure that they're delivering a customer service experience that makes their brand, rather than breaks it. With so much on the line, **their use of real-time data and analytics will be pivotal** as they seek to stay in touch with the fluctuating needs of their customers, optimize service for the metrics that matter most and, ultimately, improve overall satisfaction.

By supporting your individual agents and creating a more engaged frontline team, you can improve your customer experience and, as a result, increase your customer satisfaction and keep customers coming back for more. Get started by:

- Setting up the technology your team needs
- Providing coaching for your frontline agents
- Holding ongoing 1:1 meetings to keep reps on track with their goals and in line with brand values

#3: Don't Overlook the Value of Personalization

Personalized experiences have the power to influence customer engagement and satisfaction, and they're increasingly becoming the standard customer expectation.

About half of the customers we surveyed in the U.S. and U.K. wanted some level of personalization from the customer service teams they interact with, with 47% of respondents from the U.S. and 57% of respondents from the U.K. saying they want brands to, at the very least, know their name and know about their previous purchases.

While an ultra-high level of personalization may not be required for every single customer, the data shows that **customers do still want personalized experiences**. When they reach out to your team, it shouldn't come as a surprise.

In addition, the value of personalization in fostering connections between your customers and your brand cannot be understated. Research shows that 84% of U.S. and U.K. consumers say that **when customer service solves a problem for them, they feel more emotionally connected to the brand**. And, at the end of the day, customers will be stickier and more loyal if they have an emotional connection with your brand.

By offering personalized customer service, you give your business a competitive advantage over your competitors, create more positive customer relationships, and foster relationships that lead to repeat business and growth.



84%

of US and UK consumers say that when customer service solves a problem for them, they feel more emotionally connected to the brand.

SOURCE: 2021 STELLA CONNECT BY MEDALLIA SURVEY OF 2,100 CONSUMERS IN THE US AND UK

#4: Developing Your Service Recovery Strategy

Poor service experiences are damaging, but they can also present powerful opportunities.

For example, the Service Recovery Paradox tells us that if a brand's ability to execute service recovery – the resolution of a problem from a dissatisfied customer – surpasses the customer's original expectations, a paradox emerges, and the customer becomes more loyal than if the brand had never made the initial mistake.



The reality is, no matter how much you work to improve your agent training and your company's products and services based on the voice of the customer, some amount of negative customer feedback is inevitable.

While it may not be possible to deliver winning customer experiences 100% of the time, **it is possible to turn things around for the customer and your organization.**

Our research supports this, with an incredible [97% of consumers across the U.S. and U.K.¹](#) saying that if a brand turned a poor experience into a positive one by solving their problems immediately, they would do business with that brand again. Further, more than a quarter of consumers (26%) across both nations agree that they're more likely to leave an online review about a **poor experience turned into a positive one than an excellent experience or a poor experience.**

Service recovery offers organizations the ability to pinpoint negative interactions and reach out to affected customers to make things right. By giving your agents the tools they need to follow up on these interactions and put a proactive service recovery plan in place, you give yourself a leg up on other businesses that may let these negative interactions slip through the cracks.

Empowering your frontline agents to turn negative experiences into positive ones is **one of your brand's biggest opportunities for customer retention.**

#5: Ensure Your Customers Feel Heard

Sharing feedback with a brand is one of the top actions customers want to take after a poor customer experience, with about half of U.S. consumers (48%) and more than one-third of U.K.

consumers (37%) saying this is what they're most likely to do after a negative interaction.

Indeed, the customer service mindset is often one of prevention, with teams allocating the majority of their energy and resources toward ensuring that problems don't arise. But, in a highly complex and competitive landscape where customers are increasingly expecting brands to be "on," this mindset isn't always unreasonable.

As such, it's crucial for organizations to embrace issues as opportunities to form deeper, more personal relationships with customers.

It's also an incredibly effective way for them to drive future engagement, with our research finding that 88% of consumers are more likely to leave feedback (positive or negative) regarding a customer service interaction **if they knew it would help the agent improve their ability to service the needs of customers.**



88%

of consumers are more likely to leave feedback
if they know doing so would help the customer
service agent improve the customer experience.

SOURCE: 2021 STELLA CONNECT BY MEDALLIA SURVEY OF 2,100 CONSUMERS IN THE US AND UK

As such, it's crucial for organizations to embrace issues as opportunities to form deeper, more personal relationships with customers. Collecting real-time customer feedback gives organizations an undeniable opportunity to humanize interactions, allow their customers to feel like their voices are being heard and valued, and provide learning moments for team members.

Discover More Key Insights on the Future of Customer Service in Our Free Report

The perseverance of customer service teams has been a shining light throughout the ups and downs of the last 18 months. And while consumers' rising expectations are a sign of the indelible impact that the events of the last couple of years have had on the customer service industry, it's also a sign of brands' consistent ability to rise to the occasion in any environment.

And as these needs, wants, and expectations continue to shift, one thing remains clear: **customer service teams have a critical role to play in their organization's success going forward.** While this places significant responsibility on CS teams, when armed with an in-depth understanding of their

customers' new standards, the tools to consistently resolve their issues in real-time, a commitment to sourcing feedback, and a mindset to turn mistakes into powerful opportunities, customer service teams can continue to help their organizations thrive.

Stella Connect by Medallia is the customer feedback and quality management platform built specifically for customer experience teams. Our intuitive platform makes it easy to harness agent-level customer feedback and deliver high-impact coaching and QA programs, driving agent engagement and customer satisfaction.

For even more insights on the future of customer service, get your copy of our free report: [Customer Service Trends for 2022: Preparing for the Future of Customer Service.](#)¹



Sarika Khanna
EVP & Chief Product Officer
Medallia

Medallia

Sarika leads Medallia's product and design organizations and is obsessed with ease of use and driving value for clients. Prior to Medallia, she was SVP and GM of a high-growth cloud business, Litmos.com, at SAP. Before Litmos, Sarika led the CallidusCloud product team and was instrumental in taking the core product offering from a single-product offering to a market-leading product suite. Previously, Sarika worked in various engineering and product positions at Oracle.

Links:

- ¹ https://info.stellaconnect.com/ebook/customer-service-trends-2022?utm_campaign=Customer%20Service%20Trends%20for%202022%20Report%20%7C%20ebook&utm_source=partner&utm_medium=article&utm_content=execs-in-the-know

Driving Confidence in a Brand Through Superb CX

KIA Online Community Member Spotlight: **GEORGE BEVENSEE** by *Execs In The Know*



George Bevenssee is a seasoned customer experience leader in possession of a career that spans from the agent's chair to a seat at the boardroom

table. George is an operational maverick, applying great passion for his people while always pursuing the next great project or innovation to deliver an enhanced experience to his customers at TVC Pro-Driver.

We had a chance to speak with George in early December to learn about his experiences, his current focus, and what makes him passionate about his life's work.

George is Vice President, Customer Experience at TVC Pro-Driver, where he leads a talented team dedicated to serving the needs of professional truck driver members, no matter where the roads may take them.

EXECS IN THE KNOW (EITK): George, you kicked off your career as a call center representative and have 30+ years of customer experience (CX) leadership under your belt. What initially drew you into the space, and what keeps you passionate when it comes to helping customers?

GEORGE BEVENSEE: I kind of fell into the space. I took a job right out of college as a customer

service rep (CSR) for a major telecom. It wasn't exactly my career aspiration or a dream job for me, but I realized I had to start somewhere and put my best foot forward. I soon realized I really enjoyed being a CSR and liked delivering great service.

Those early experiences, both good and bad, never really left me. In fact, they proved invaluable and still help me even to this day when it comes to understanding and empathizing with our workforce and making thoughtful decisions. This background helps me always have our workforce in mind when making decisions for the organization.



My passion for great customer experience is rooted in my own experiences as a customer. Some of those experiences were not so great, and this inspires me to try and do better. I want to provide quick access for our customers, a high-quality experience, and ensure our team conveys a high degree of confidence. When a customer gets off a call with one of our people, I want them to think, "Wow, they've really got this!" It's important in our business, since we deal with legal issues for our customers, and we want our customers to understand they have someone working for them.

EITK: TVC Pro-Driver might not be a household name, but the company's customers (professional truck drivers) are a critical part of the American economy. For anyone not familiar, can you share a little bit about the services TVC Pro-Driver provides?

GEORGE: We are well-known in the trucking industry. We provide a membership service for professional truck drivers. The premiere service is our legal support. Essentially, if a driver gets a violation out on the road, we have a network of attorneys across the United States, partners of ours, that can help with that situation.

And, of course, our attorneys are in court all the time. They are familiar with the players, like the prosecutors, so they are able to get the best possible outcome for our members. We are very interested in keeping our drivers' livelihoods

intact. If someone gets enough violation points, they don't have a driver's license anymore. For you and I, that would be very disappointing, but it's not the end of the world. We can always take an Uber or have someone drive us where we need to go. But if you are a professional driver and you lose your license, you have also lost your livelihood. So, legal representation has been a core element of the membership service we provide for our drivers.

Also, about four years ago, we introduced a fuel discount program which is a very significant program for our drivers. It's good for our company as well. The program provides around a \$.50 discount per gallon of diesel fuel for our members. They get a card and can load funds to it, and when they get to the pump, they get the discount. This has been a great part of our

business, and we have a huge demand for this product. There are also other significant benefits for our drivers, and we offer several membership plans, depending on a driver's needs.

EITK: You have been in your current role with TVC Pro-Driver for nearly two years now. What can you share about the philosophy and culture of the company as it applies to CX?

GEORGE: We have a deep concern for how our drivers are served and for their life cycle with us. We want customers to stay with us long-term and, along the way, realize the value of their TVC Pro-Driver membership. Recently, I was invited to speak at a presentation





for our sales team. One of the things I talked about was my belief that CX starts with the sale – what a customer is told and how our service is described. It's very important for us to correctly describe our services and then, along the way, have our marketing team there to remind our members of the various services and value included in their membership. And then, of course, my team coming in and adding even more value by providing the best service possible. What we really strive to do at TVC Pro-Driver is create a white glove experience for our members.

EITK: A lot of attention has been paid to the employee experience (EX) recently, but this has always been an area of focus for you. For CX practitioners who have only recently been empowered to invest more time and attention on EX, what advice do you have?

GEORGE: My advice might seem a little counterintuitive, but it's to focus on supervision. People's satisfaction with their jobs rests with their direct manager. Supervisors spend more time than anyone interfacing with CSRs, but they typically have the least amount of training and

development within call and contact centers. If a company spends the time and really works with their frontline supervisors, it's a win-win-win kind of situation. The supervisor gets the time and attention they wouldn't normally get. The CSR gets a better employee experience. And the organization, for its part, will tend to have fewer employee issues. This is a formula I've taken with me to numerous organizations within my time in the CX space.

EITK: Expanding on the topic of employees, can you talk a little bit about your organization's pivot to work-from-home during the pandemic, and how you maintained engagement with your frontline staff?

GEORGE: The decision to shift to work-from-home was made before I joined the company, taking place in the depths of the pandemic. When I got here, the workplace was already remote, and one of the first things I discussed with my boss, the CEO, was the need to keep the arrangement in place. Looking into



the future, and understanding business was changing, I understood that once we opened that door to let people work from home, they wouldn't want to let go of that arrangement. We want to be an employer of choice, as well,

and work-from-home has been working quite well for us. As I understand it, there were a few bumps in the road initially, mainly technical, but those have been overcome. The workforce has adapted quite well. So generally, our thought is, let's not disrupt this, because it's working quite well, and it really is a value-add for attracting people to us in the future.

In terms of engagement, we recently enabled Yammer for our company. Every day people are using the platform to post things and stay connected. Our people use it approximately 70% for personal vs. 30% for business. We have everyone working from home, so it's a way to bring everyone together on a platform that's not necessarily work-intensive.

EITK: Along the lines of the previous question, what strategies does TVC Pro-Driver employ to develop agents into future CX leaders?

GEORGE: There needs to be a career path within the contact center, and this is very big for us. At TVC Pro-Driver, we've tiered our CSR positions. We have a CSR Level 1, Level 2, and Level 3, with different salary ranges. Someone

qualifies to move up through the tiers based on good performance and tenure on the job. Our Level 3 position, which can be achieved after two years with the company, comes with a wage able to handle all of someone's needs, and we've awarded this to several of our people. Also, after six months, people can become supervisors at TVC Pro-Driver. Sometimes we'll hire people who really have the aptitude for supervision, and we can bring them up through the organization to that supervisory role.

We also just brought onboard a new director level position on Development and Engagement. I've been collaborating with this person recently, looking at where we can help people along on their career path ... what are their development needs ... that sort of thing.

The other thing that we are in the process of putting together is a learning management system (LMS) curriculum on team management and leadership – not only for our supervisors, but also for our Level 2 and Level 3 customer service reps who may become supervisors. More to come on this.

And finally, on a personal level, more than anyone I've ever worked for, I spend a tremendous amount of time information-sharing with my direct reports, explaining concepts, and discussing strategy. Even if it's not in their wheelhouse, I set the vision of where we're going and the different roles that everyone is playing to get there. This ensures everyone is up to speed on what's going on, making sure everyone can see they are a part of something bigger.

EITK: Can you share with us which projects have had the biggest impact on the experiences of TVC Pro-Driver customers over the past 12-24 months? What are today's top priorities? What have been the outcomes, and what results are you expecting from current efforts?





GEORGE: Prior to my arrival, TVC Pro-Driver had a good operation, but there was a lot of low-hanging fruit that I've been able to address. Coming in the door, the first thing I worked on was access. Correct staffing and agent productivity are both huge. We've taken care of this to a very large degree. We created an automated SMS notification for legal cases for our members, and this also acts as a call avoidance system. When a member's case moves to a different level, a message goes out to them to explain where their case is at in the process. Additionally, I launched a Quality Monitoring Team. We developed a legal support team for our fleet customers that didn't exist in the past.

We also brought in the Lessonly Learning Management System (LMS) and developed it with the idea that we would do all our initial training online. We were successful with that, but very careful to make sure that we did it the right way. We landed on a blended curriculum, so there is the actual LMS learning, but there are also periods where the trainee observes phone calls, collaborates with their trainer, and partakes in one-on-ones. It's worked out wonderfully, and we've had great success with that.

We also went live with Five9. We had a very antiquated phone system when I arrived, and we went looking for a replacement. We decided on Five9 after a lengthy investigation and RFP process, and it's been very good for us. All in all, a lot that has happened in a very short period of time here.

EITK: Sounds like it's been a very busy and productive couple of years. Can you share a little bit about what's coming next for you and the operation?

GEORGE: In 2022, my aim is to transform my group into a multichannel service center. Right now, we are voice only, but we have the ability to turn on chat, SMS, and email. We want to get to that point to offer more options for our members. The other thing we want to do is supplement our in-house Hindi support team with outsourced Hindi language resources. Twenty-five percent of our customer base is Hindi-speaking. It's very challenging to find folks who can speak the language here in Oklahoma, and we want to match language to language.

The other thing I'd add ... I mentioned earlier about our network of attorneys ... well, we have built an automated online scorecard for our attorneys, measuring how they are performing. Our legal case outcomes are really important to us, so we are starting to closely monitor this – the outcomes that are achieved, as well as the rates being charged, how easy they are to work with – that sort of thing. We want to make sure we do an excellent job of managing our roster of attorneys.

EITK: You have a strong security background and are even a Certified Protection Professional (CPP). How does this background and training serve you in your current role?

GEORGE: My security experiences really rounded out my business career by providing management experiences outside of the call center world. To name just a few of those

experiences, I was able to lead programs such as ISO, certifying a division of a company, I helped develop a post-order system for our field managers; and I was part of a team that developed and then distributed new technology to field managers. And before TVC Pro-Driver, for several years, I ran a security program for a company at a major sporting event with 800+ security officers. Based on my security background and my CPP designation, I was once chosen to lead the startup of a large operation center that included a call center, a national temporary security officer order team, and a national video surveillance operation.

Summarizing ... I've got these experiences that rounded out my career, but then put me in a position to have a program build under my belt, which was something I didn't have before. It was a beginning-to-end experience. Literally, all the way from site selection to go-live, I led the development of the center from the ground up. All of these experiences just helped me hone my leadership and management skills, putting me in different scenarios where I had to perform. It has all helped me get to where I am now.

EITK: You have been a very active member of the Know It All (KIA) community since joining this past spring. What value do you get from your interactions on KIA, and how would you describe the value of the community for anyone considering joining up?

GEORGE: I've had great interactions in the KIA community. I think it's a very vibrant community of professionals, and it's always interesting to see what others are doing. I enjoy floating ideas to others and having them float ideas to me, as well as the wider community. It's great to have a place to go to get my questions answered.

Also, I will tell you, aside from being active, there's always a lot of reading that I'm doing. Maybe not always responding, but just reading

what people are talking about. I think it's a great way to help elevate the profession, and I'm so glad I joined. I've even had conversations with community members outside of the online platform. For instance, I'll post a question, and someone will respond with, "Why don't we hook up and talk?" I've had conversations about outsourcers, vendor selection, and workforce management (which I have a background in). I have found that people are very giving of their time, which is great to see. Whether it be online or offline, people are very willing to give a half an hour of their time to talk about the topics that are so important to our industry. ✨

Thank you to George Bevensee, Vice President, Customer Experience at TVC Pro-Driver, for his leadership, participation, and insights. To connect with George, or to participate in the wider conversation, consider joining the Execs In The Know "Know It All" (KIA) Community. The KIA Community is a private, online community designed exclusively for CX Leaders at consumer-facing brands. Come learn, share, network, and engage to innovate. [LEARN MORE](#)*

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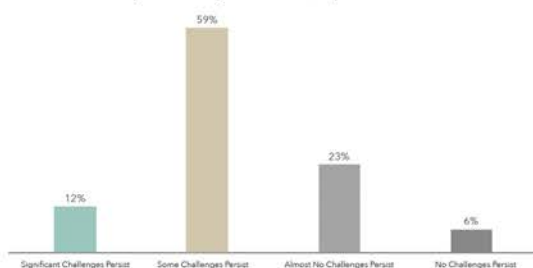
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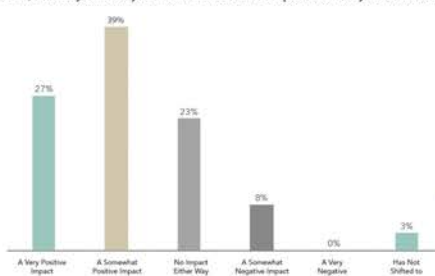
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