CX Insight

The **Future** of **CX** Is to **Personalize** & **Differentiate**

Proactively shaping seamless end-to-end experiences that meet customers' ever-evolving needs.

FUTURE–PROOFING YOUR CX INVESTMENTS

IMPROVING CUSTOMER EXPERIENCE THROUGH DIGITAL TRANSFORMATION

IS IT TIME TO INCREASE YOUR INVESTMENT IN AGENT QUALITY?

BRAND SPOTLIGHT: MARRIOTT INTERNATIONAL

CX Insight

AN EXECS IN THE KNOW PUBLICATION

in this issue

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

Taking a closer look at how to reimagine CX by making personalization and differentiation part of your core business strategy.

Game-changing innovations are forcing a reinvention of what it means to deliver exceptional customer experience (CX). We are living in an era where customers don't just want personalization, they demand it.

Personalization is a crucial capability that punches above its weight and raises the bar when it comes to connecting meaningfully. It matters more than ever before, directly influencing behavior across the customer life cycle. As customer expectations continue to grow, and consumers are becoming more selective of which brands they interact with, successfully standing out from the noise is just as important.

In this issue, we take a closer look at some of the ways forward-thinking companies are surpassing their competitors by keeping CX at the heart of their business. From devising strategies that incorporate automation to enhancing employee capabilities and finding the right balance

between digital and human interactions, you'll learn how the world's top CX leaders are setting their brands apart from the competition.

We also get a behind-the-scenes as we look at Marriott International through an exclusive Brand Spotlight featuring Thom McDaniel. Additionally, we will be featuring Sheila Knight-Fields from the vacation rental hospitality company, Evolve, in a KIA Member Spotlight.

Much has changed since our first issue. But one thing has remained the same — and that's our unyielding passion for CX. As always, we hope this issue enlightens your perspective and provides the spark to new ideas and innovation.

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Future-Proofing Your CX Investments *by Execs In The Know*

Staying in lockstep with corporate goals and objectives will ensure your CX investments are well-positioned and better protected for the future.

Since we cannot predict the future, we need to do what we can to plan for it. The concept of future-proofing is a well-known practice in many industries, including architecture, construction, electronics, utilities, and climate change. In recent years, it has increasingly gained popularity in customer experience (CX).

As CX leaders, we certainly know the importance of being resilient, planning for the long-term, and protecting the investments we make to improve our customer and employee experiences. But with all the near-term pressure to deliver, how can we plan and launch initiatives that are more likely to serve us in the long haul? That balancing act is important to our success, and there are several considerations to help you win now … and later.

Consideration 1: Strategic Alignment

The first and arguably most important consideration is how well your CX investment aligns with your corporate strategy. Since your corporate strategy sets the overarching direction and goals for the company, having an aligned and supportive customer experience approach is imperative. With a corporate strategy as your guide, develop a CX strategy and operational plan to maximize the delivery of company goals. Identify ways that CX will advance the corporate vision and create your budget to fund those projects that drive alignment and delivery. Staying in lockstep with corporate goals and objectives will ensure CX investments are well-positioned and better protected for the future.

A second area for strategic alignment can be revealed in your customer data. Dive into the data to uncover how customer wants and needs line up with corporate and operational strategies. From there, focus on developing and funding the opportunities that will make the biggest impact in the long-term. For a comprehensive view, ensure you are analyzing existing and future customer demographics.

Based on the strategy and the insights revealed in the data, you can then define the ideal experience for customers and employees. One of the best tools is tried-and-true journey-mapping, where you can define the model experience and build out a roadmap of initiatives. When doing this work, be sure to involve experienced designers, and include an examination of people, process, and technology to ensure you are taking a comprehensive view of the current and future states, which will also help future-proof your plan.

Consideration 2: Employee Investments

The second area of consideration focuses on our most important asset: our employees. With the labor market in flux, the agent experience is a leading topic in many organizations, and the investment companies make in their employees can have long-term impacts. To future-proof your investment, take a hard look at the experience your company offers across the entire employee lifecycle. Examine recruiting, hiring, training (new-hire, refresher, and uptraining), and performance management. What can you change to help your CX team members enjoy their job more, stay longer, and deliver or support stellar service? Something simple can make all the difference!

Another reliable source for investigation is employee exit data. That data, which can reveal some important insights from the former employee's perspective, is a resource that taps into unique information that can be addressed to create a positive return. Whether your organization uses surveys, interviews, or a combination of both, when conducted properly, you will gain a better understanding of what's working and not working in your organization. Offer the opportunity to share feedback to all former employees, not just top performers or long-tenured employees. The more you

can understand the reasons for exit from a departing employee's standpoint, the better you can address pervasive issues, increase employee satisfaction, and keep employees that know your business — all important aspects of future-proofing your CX investment.

Finally, when considering employee investments that help future-proof your CX spend, a secret weapon is Quality Assurance (QA) roles. Think about it: QA is an important part of enhancing agent performance and improving customer interactions. As an objective resource, the QA team monitors and assesses contact quality to highlight what the agent is doing right, as well as opportunities for improvement. Delivering the highest quality interactions that drive key performance indicators is every agent's primary goal, and the QA team is responsible for aligning employee practices with the organization's overarching goals. Keeping score and driving higher agent performance is a sure

way to future-proof your employee and CX investments.

Consideration 3: Technology Investments

Technology certainly plays a big part in future-proofing your CX investments to ensure you are spending on technology that will reap dividends for years to come. No one could have predicted the events of the past couple of years and the massive technology investment most companies made to power a remote (and now increasingly hybrid) workforce. But what we do know, no matter the circumstances, is that supporting the agent's experience with tools and technology is a critical part of future-proofing your investments. Ensuring that you allocate resources for agent assist technology not only improves performance, but delivers a positive return on investment well into the future.

We also know customer behavior is changing dramatically: [sixty percent of of all internet traffic](#)[1] now comes from mobile, with desktop usage on the decline. Investing in the integration of customer care resources in your brand's mobile app or creating a stand-alone app for customer service is a sound strategy. With customers spending more time on their mobile devices than ever before, brands that meet and help customers where they are will win. And, the likelihood that this mobile-first trend is expected to increase makes the investment a wise one for years to come. A great first step to making an investment in mobile support is understanding what your customers expect from this channel. Listening to your customers is always a beneficial exercise!

The same is true for self-help solutions. We can all agree that keeping the customers we currently have is more advantageous than finding new ones. So, making the customer service experience frictionless and simple is essential. Self-service tools empower customers to get information and help on their terms. In our *Self-help Solutions: Exploring Consumer Experiences, Preferences, and Opinions* Report, research showed that self-help solutions are quite effective at resolving issues and answering questions with an overall [resolution rate of 78%](#)[2]. More important, this research also revealed that getting self-service right is critical to customer perception and use of the tools. To ensure your self-help offerings are future-proofed, take the time to understand your customer and the specific opportunities your brand has. You can also offer customers a way out of the self-service path in case they need it, and test and learn to create solutions that provide a return on investment that lasts well into the future.

Consideration 4: Predictive Analytics

Many of the recommended considerations involve analyzing data to understand what the voice of the customer is saying. Another consideration related to data is predictive analytics, which uses historical data and modeling to forecast future outcomes. Organizations that invest in data science teams and tools that use predictive analytics can uncover themes and patterns and use these learnings to identify risks and opportunities. This information is invaluable input to any strategic and operational planning, as it can help protect investments.

Partnering with your data science team is a fantastic way to get started. Bring the team members into your business and share your current business performance, goals, and needs to ensure that they are familiar with your strategy. The more they understand about your organization, the more equipped they will be to deliver insights that you can use to influence your investment decision-making. Consider asking the team to do a customer interaction analysis, where they examine channel usage, customer satisfaction, and behavioral data to reveal actionable intelligence that exposes gaps in the experience. Based on these learnings,

your people, process, and technology investments will be backed and protected by science.

Making Sound Investments

Future-proofing your CX investment is not an easy task. Day-to-day operational demands often force investment in the now, without time to consider the impact on the future. It's the classic struggle between the tactics to deliver today and the strategy that allows for planning the initiatives and innovations that will power the future.

Although protecting your CX investments is not effortless, the considerations discussed can ease the burden and help ensure a future-proofed strategy. As you consider ways to ensure you use your resources wisely and invest for the long-term, four of the most important actions you can take are:

1. Ensuring that your operational plan and associated resource allocations are aligned with the corporate strategy

2. Investing in programs to improve the employee experience

3. Developing long-term enhancements of your technology stack

4. Leveraging data science to predict customer behavior

Future-proofing isn't about correctly predicting what will happen next; it's about leading with flexibility, resilience, and perseverance so you can adapt to the unknown. It's also about allocating resources to investigate investments through the lens of the future. At its core, future-proofing ensures that the investments you make are ones that keep customers and employees happy. After all, your organization's success depends on the experiences you deliver.

Links:

1 https://gs.statcounter.com/platform-market-share/desktop-mobile-tablet

2 https://execsintheknow.com/wp-content/uploads/2022/07/Self-Help-Solutions_Consumer-Research_July-2022.pdf
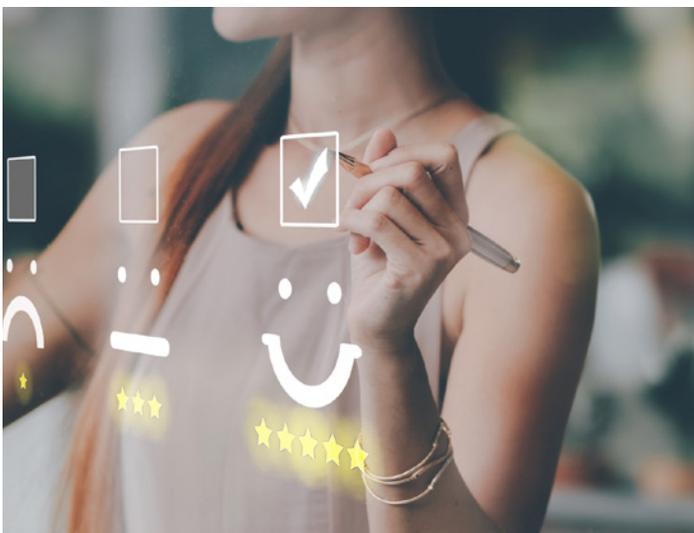
Improving Customer Experience Through Digital Transformation

How implementing technology like AI and ML can drive personalization.

by Frank Pettinato, CEO of Avantive Solutions

Artificial Intelligence (AI) is being introduced in all aspects of our lives. From voice assistants in our homes to online fraud detection and facial recognition for unlocking mobile phones, it's being integrated into everything we do. The pandemic further accelerated the need for technological solutions for solving problems and answering questions. It changed how we interacted with others and forced even hesitant individuals to get more comfortable with digital technology. By 2025, AI is predicted to drive 95% of customer experience[1].

Some people hear "artificial intelligence" and think of Sci-Fi movies where robots take over. Even for those that are not that wary, there is often the concern of interactions being impersonal and lacking human touch, leading to faster frustration levels — especially after two years of limited human contact around

the world. However, when done well, digital transformation technologies not only optimize processes, but also make for a richer, more personalized experience for individuals.

Companies that do not embrace this technology or put it to good use will be left behind in the race for customer satisfaction. In a recent poll, 67% of business leaders say their company will no longer be competitive if it can't be significantly more digital by 2020[2]. The world is moving toward an increasingly digital economy, and companies are now required to provide not just good, but best-in-class customer experience in order to stay competitive. So, how do you get there?

Digital Transformation's Impact on CX

Digital transformation as it relates to customer care is the process by which organizations become more responsive to their customers and make better use of available technologies; it's meant to change business models and optimize practices, as well as products, into something significantly better. It encompasses

several different technologies and systems, which is why it's best to break it down into two distinct categories: Enterprise- and customer-centric digital transformation.

Enterprise-Centric Innovations

Enterprise-centric digital transformation is technology centered around the contact centers and the agents. It's no secret that in today's world, we are able to collect vast amounts of data on people, but that information alone is not enough. To really make a difference, companies must connect the dots to make a well-rounded customer profile. This is where technology such as cloud computing, AI, machine learning, and data and voice analytics come into play.

They allow companies to gain insights into their customers' preferences, behaviors, and opinions. Understanding both psychographics and demographics provides a fuller picture of who your customer is, what they buy, and how they travel through their customer journey. The information can also be analyzed to identify trends and give insight into how customers interact over time, allowing you to create a more

95%
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67%
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90%
of customers are willing to share data for easier brand experience

96%
of customers say that customer service is crucial for brand loyalty

tailored interaction with the brand. According to SmarterHQ, [90% of customers are willing to share behavioral data for a cheaper and easier brand experience][3].

While technology can deliver a smoother experience for customers, there is still great value in the human element. You can increase the likelihood that a customer will have a positive encounter by pairing them with an agent who has similar personality traits or customer service skills through agent-to-customer matching. This sets the call up for a higher success rate before the conversation even begins.

Customer-Centric Engagement

Outward-facing technologies, or customer-centric digital transformation, are centered around the customers' interactions with the brand. Customers have more communication channels than ever at their disposal. While some may pick up the phone, others may send a message through their preferred social media platform. Still, others may choose to text, email, or use a chatbot for instant interaction on your website.

Being omni-channel allows companies to offer customers self-service options well beyond typical operating hours. This can help reduce costs associated with human resources and improve efficiency by making processes less time-consuming for employees. The key is to meet the customers where and when they are most comfortable.

The biggest challenge with creating an omni-channel customer service strategy is

ensuring it's a seamless experience across all communication channels. Customer frustration tolerance is lower through non-human options, so it's important that all channels are well-integrated.

Personalizing the Experience

There are countless benefits to personalization. It helps build trust with customers by demonstrating that you know them and their preferences well enough to make changes that will improve their overall satisfaction with your brand. In addition, the consumer feels more valued by being able to control their experience and communicate with you the way they like best.

Personalizing customer experiences involves capturing data and then turning that data into actionable insights that help you understand how best to serve people. Customizing your

+25%
Conversion Rate

2X
tNPS

-5%
Cost Per Sale

Branded Calling

interactions through digital transformation will make customers feel like they're getting exactly what they want from you – and that's what increases brand loyalty. We can utilize a number of emerging technologies to accomplish this.

Demographic and Behavioral Profiles

To have an excellent customer interaction during outbound calling, you first need the customer to answer the phone. That has become increasingly hard in a world full of communication clutter and eroded trust due to robocalls. In fact, 94% of unknown calls go unanswered[4]. The first step is to know the ideal contact time based on their demographic and behavioral profile. It's one thing to know what time zone a customer is located in, but it's even better to know that a customer is, for example, retired and typically home early in the afternoon. Using branded calling to add a company logo, brand name, and a specific reason for the call adds an additional layer of trust. When the right offer is presented at the right time, a higher conversion rate, up to 26% at the device level and 23% at the wireless level, was recorded[5].

Customizing Conversations

No one wants to feel like a number in a cue. One way to help agents connect to the customer is by providing a roadmap to help them navigate the conversation. Avantive Solutions does that through an artificial real-time intelligence bot (ARTI) and compliance adherence tool that runs alongside the agent CRM. Giving agents a co-pilot allows them to focus on listening and having an engaging conversation, while it suggests language prompts and speech speeds. Knowing what to say is useful, but knowing how to say it takes the engagement to the next level. Using ARTI guidance, one program saw up to a 17% increase in First Call Resolution and increased

Net Promoter Score (NPS). A tool like this can also verify and guide agents on required disclosures, leading to improved policy and procedure adherence.

Tailored Offers for Better Sales

To succeed, you must understand your audience at more than just a surface level. This is where you need to explore customer needs, buyer intent, typical pain points, and more. Using machine learning, companies can leverage known data and predictive models to select targeted offers and communicate the right message to solve a problem or sell a product. Did you know 80% of customers are more likely to buy when businesses offer a personalized experience?[6] For example, it would be helpful for a telecommunication company to know that a household has two teenagers who enjoy gaming. The household would probably be interested in faster internet speeds, particularly during after-school hours, with a multi-device discount. Adding additional layers of information through Machine Learning opens the door for more sophisticated customized scripts and offers, making customers feel valued.

Improving the Process for Success

To consistently improve your customer experiences, it's crucial to collect data and continually improve your processes. Each interaction can provide you with critical information about the customer or member that you can use to work toward a better experience in the future. This is also where connecting the dots of like data can reveal the emergence of trends.

Giving customers a seamless digital experiences based on data-driven, cognitive artificial intelligence and tailored to individual needs, where and when they are most comfortable, is a formula for success. Research

Key Takeaways
Questions to Ask During Your Digital Transformation

- Are you reproducing an old process with new digital tools or are you creating something significantly better?
- How can you build new digital business models?
- Are you including the right people in the planning process?
- Are you ensuring your digital transformation technology is secure?
- How will you define success?
- What are the top pain points for your customers?
- What platforms are your customers most comfortable using?
- If your customer has a complaint, where would they turn first?
- How is your customer service experience compared to your competitors?

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by [Deloitte and Touche found that customer-centric companies were 60% more profitable](#)[7]. If you haven't explored how digital transformation can drive a more personalize, improved customer experience for your customers, now is the time to start asking questions. Improving your processes could improve brand loyalty, increased customer acquisition and increased sales, and create a positive brand reputation that will set you up for a success in a quickly evolving digital world.

Links:

1   https://www.smartkarrot.com/resources/blog/customer-experience-statistics/

2   https://www.gartner.com/smarterwithgartner/mobilize-every-function-in-the-organization-for-digitalization

3   https://www.wunderkind.co/blog/article/smarterhq-wunderkind-audiences/

4   https://blog.hiya.com/robocalls-explained?itm_medium=website&itm_source=blog

5   https://www.numeracle.com/download-case-study-form

6   https://www.epsilon.com/us/about-us/pressroom/new-epsilon-research-indicates-80-of-consumers-are-more-likely-to-make-a-purchase-when-brands-offer-personalized-experiences

7   https://www2.deloitte.com/content/dam/Deloitte/de/Documents/WM%20Digitalisierung.pdf

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CEO

Frank Pettinato is an accomplished thought-leader with expertise in strategic leadership, sales and marketing, innovation, and technology. Currently, he is the CEO of Avantive Solutions, a global provider of digital marketing and business process outsourcing (BPO) solutions, where he uses his passion for Purpose-Driven culture and results-oriented style to delight clients, engage and develop his employees, and support the community.

Avantive Solutions is a purpose-driven, global digital transformation leader specializing in designing, building, and delivering innovative customer experience (CX), strategic sales, and digital marketing solutions.

Learn more at [avantivesolutions.com](#)

The Future of Work: Using RPA to Boost Employee and Customer Satisfaction and Engagement

With the pace of change showing no sign of slowing down — and with talent resisting calls to return to the office — technology is emerging as a key enabler for the hybrid working models of the future.

by Oded Karev, General Manager of Robotic Process Automation, NICE

The world has emerged from the worst of the COVID-19 pandemic, but its legacy remains with us. How companies operate, the ways in which people work, and employee expectations have changed for good. Hybrid and remote working models are here to stay, but many organizations are still grappling with what they mean for their employees and operations.

Although work-from-home business models have matured enormously over the past two years, enterprises still find it challenging to attract, retain and engage the best talent. Recent surveys from the likes of Gartner[1] highlight the concerns that CEOs and HR leaders have about nurturing company culture, engaging employees and supporting their teams in remote and hybrid working models.

Employee satisfaction and engagement are top of mind for enterprises. Leading companies understand that employee satisfaction is

a key driver of customer satisfaction and organizational performance. [Gallup research](2) indicates that highly engaged business units achieve a 10% difference in customer ratings and an 18% difference in sales, as well a 23% difference in profitability.

Engagement Levels Remain Low

However, Gallup's [surveys](3) also show that nearly 85% of employees worldwide are still not engaged or are actively disengaged at work. The result is lower productivity and performance and customer satisfaction, as well as higher attrition and training costs. In a [recent survey](4), more than 80% of contact centers indicated that employee attrition had either stayed the same as the previous year or increased.

With the pace of change showing no sign of slowing down – and with talent [resisting calls to return to the office](5) – technology is emerging as a key enabler for higher levels of employee

and customer engagement and satisfaction. Automation, in particular, has an invaluable role to play in augmenting employee performance and relieving people from the need to carry out tedious, repetitive tasks.

As we argued in our previous [article](6) for *CX Insight*, if people really are at the heart of customer service, then it is important to look at what is most likely to trouble our employees. Let's take a closer look at three mega-trends reshaping the world of work, as well as how automating and streamlining processes can help your business to optimize performance and employee satisfaction.

Mega-Trend 1: Home Alone

Remote and hybrid work have created positive spin-offs for organizations and their people – ranging from better work/life balance, more flexibility and reduced commuting time for employees to access to new talent pools and opportunities to downsize real estate for enterprises. But, we have also lost something in the transition to remote and hybrid work.

Before the pandemic, teams could bond over water cooler moments, share a joke in the kitchen and knock on a supervisor's door to ask for help. Managers could keep their finger on the pulse by walking the call center floor and having informal discussions with team members. These benefits are lost when there is more physical distance between people.

Supervisors have less visibility into who their top performers are, how effective their business processes are, average handling times for customer interactions, or how much time agents spend in productive applications and what they do in the wrap-up time. Employees, meanwhile, may start to feel unmotivated or lose direction when they cannot easily access help and support from a peer or leader.

Troublingly, U.S. worker productivity[7] in the second quarter of 2022 fell at its steepest pace on an annual basis since 1948. Nonfarm productivity, which measures hourly output per worker, fell at a 2.5% pace year-on-year. Many companies are thus facing labor shortage, as well as a productivity gap, as employees stop giving their all to their work.

GAINING VISIBILITY AND INCREASING PERFORMANCE

To change this situation, an organization can leverage technology like an artificial intelligence (AI) powered desktop analytics and task-mining solution. Such a solution gives you visibility into how employees are executing tasks and processes on their desktops. It will help you map out what a day in a life of your employees looks like.

This enables your contact center supervisors or back office managers to see what bottlenecks your people encounter as they do their work. Which common desktop tasks are slowing them down? Which processes send them to the knowledge base for assistance? And where are they taking shortcuts rather than complying with policy?

These insights empower you to support employees with targeted coaching, provide process guidance address process inefficiencies and hold people accountable for performance. They also help you to prioritize processes for optimization by parameters such as frequency, process handle time, importance, proneness to error, complexity, variance and manual action types.

You can also boost engagement and incentivize

desired agent behaviors via techniques like gamification. One travel and hospitality company used personalized coaching and gamification via a personal digital assistant to increase employee engagement in the work-from-home setting. By the second month, 180 agents had grown their sales by 5%.

DIVING DEEP INTO BACK-OFFICE PRACTICES

Consider the example of South African medical scheme administrator, Medscheme.[8] The company's back office was working at least $190,000 in overtime every month. Workloads weren't rising enough to explain the need for these extra hours, which suggested productivity was falling. After examining other performance metrics, Medscheme realized that quality scores were also sliding.

Using desktop analytics, Medscheme found many employees spent little of their time in the core CRM system. In some circumstances, this indicates that the employee is handling more complex cases which require more external research, but in others, it signals inefficiency or a lack of adherence. These insights enabled Medscheme to improve performance through coaching and accountability.

Medscheme realized value in the form of:

- Increased productivity, with overall agent adherence increasing from 60% to 80%;

- An improvement of 40% in customer satisfaction; and

- $2.8 million annual return on investment.

Mega-Trend 2: Employee Attrition and Disengagement

Following the pandemic, employees have become more vocal about the need for better work/life balance. No longer are they willing to risk burnout or work long hours of unpaid overtime. Some are rebelling against unreasonable work demands by quitting their

jobs. The so-called Great Resignation[9] saw 71.6 million people in the U.S. leave their jobs from April 2021 through April 2022.

Others have responded through "quiet quitting" – a phrase that refers to employees who don't go beyond the call of duty in their jobs. In some cases, this is a healthy reassertion of the boundaries between the personal and professional, which blurred during the pandemic. In others, it's a sign of disengagement, with employees doing the bare minimum of work to stay out of trouble.

AUTOMATING LOW-VALUE TASKS AND AUGMENTING HUMAN STRENGTHS

The US Contact Centre Decision-Makers Guide 2021[10] suggests that repetitive work remains among the top-three reasons for agent attrition. It thus stands to reason that leveraging the digital workforce will not only make human agents more productive, but also give them a better employee experience and empower them to deliver a better customer experience in turn.

Automation has key role to play. Robotic process automation (RPA) can handle the sort of tedious, repetitive admin work that few people

enjoy doing. Software robots can take care of tasks like capturing data from forms. This helps your company make better use of human time, scale services fast and improve process accuracy – all while offering a better work experience.

Software robots supplement your capacity when human talent is in short supply. They also improve employee engagement and satisfaction by sparing people from the need to do boring tasks. Employees can focus on customer service and valuable business priorities – which can also help improve the employee experience.

Personal digital assistants, meanwhile, can help augment human performance and improve employee engagement. These desktop bots are triggered automatically by the employee's desktop actions, popping up with just the right advice. They can handle busywork like in-app selections, button clicks and field entries.

They can also support employees' next-best-action advice or compliance guidance – for example, disclosures, reminders, sales best practices and product details. By providing a full view of the customer, with relevant data drawn from multiple screens and applications, personal digital assistants empower agents to deliver the best advice.

Mega-Trend 3: Making an Impact

After the pandemic, many employees are seeking personal value and purpose in their work. Two-thirds of respondents in a global Gartner survey[11] said that the pandemic had made them rethink the place that work should have in their life. Employers thus need to consider what their purpose is and how they enable their employees to bring it to life.

The contact center agent, for example, has an unsung importance in delivering exceptional customer experiences. They often interact with customers who are distressed, anxious or angry. Customers might be worried about their finances after receiving a large medical bill, concerned about slow settlement of an auto insurance claim or struggling with a technical issue with their mobile phone.

It's not an easy job, and most agents take pride in being great ambassadors for their organization by helping customers. Yet inefficient business processes, slow computer systems or a lack of policy guidance might frustrate them as they do their jobs. That, in turn, can lead to disengagement, attrition and poor customer service.

EMPOWERING AGENTS TO HELP CUSTOMERS

Personal digital assistants can support your agents as they try to help customers, while complying with your company's internal KPIs. Consider the example of an agent in a health insurer's call center during a peak period. Even as they complete a call with one customer, they'll know that many others are holding on for help.

A personal digital assistants can handle call wrap-up tasks like summarizing the call, updating customer details, and sending a confirmation email. This frees the agent to

move on to the next call, knowing that they've done everything they need to for the previous customer. They'll also get pop-up tips and guidelines for executing a complex or new process, giving them confidence in customer interactions.

Automation: Making Work and Service More Personal and Human

Following the pandemic, organizations and employees alike have reassessed their priorities. In this new world, we're all looking for solutions to longstanding pain points that were exacerbated by COVID-19. Keeping staff up to date with ever-changing tech and regulations, meeting higher customer expectations and driving efficiencies matter more than ever.

Automation helps to address these pressures. With software robots taking on more of the drudge work, people are freed to focus on the human side of the equation – delivering more personalized experiences, optimizing performance, and fostering higher levels of engagement and satisfaction among employees and customers alike.

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

task-mining solution, and owning the largest automation projects in the industry.

NICE

NICE, an RPA leader, has been setting industry-wide standards in Robotic Process Automation for over 20 years. Its innovative Attended Automation solution, NEVA, brings people and robots together, enabling intelligent process optimization while unleashing employees' potential to ensure exceptional customer experiences.

Learn more at nice.com/rpa

Links:

1   https://www.gartner.com/en/newsroom/press-releases/2021-10-20-gartner-survey-reveals-hr-leaders--number-one-priorit

2   https://www.gallup.com/workplace/236366/right-culture-not-employee-satisfaction.aspx

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4   https://think.fonolo.com/state-of-the-contact-center-2022

5   https://www.bbc.com/worklife/article/20220113-why-a-wide-scale-return-to-the-office-is-a-myth

6   https://execsintheknow.com/wp-content/uploads/2022/07/July-2022-CX-Insight-Magazine.pdf#page=35

7   https://www.reuters.com/markets/us/us-productivity-drops-second-quarter-annual-decline-largest-ever-2022-08-09/

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BRAND SPOTLIGHT
Marriott International

Mastering the Balancing Act Between Technology, People, and Culture.

An interview with Thom McDaniel, Vice President, CEC Product & Site Services at Marriott International.

Thom leads the technology support for Marriott's Global Customer engagement teams with 6,500 associates and 20 contact centers that deliver over $5B in revenue to Marriott's shareholders. In a recent conversation with Thom, we discussed his career journey, Marriott's culture, its values, and overall mission as it applies to CX-related technology, and how the brand is influencing travelers to create their own experiences.

Execs In The Know (EITK): Tell us a little about your background and how you came to be at Marriott. What is the day-to-day focus for you in your current role?

Thom McDaniel: Interestingly, my college background was journalism. At the time, I was interested in communications and always had a curiosity in technology, which progressed into a variety of job opportunities right out of college. I'd say I started in what a lot of people call "the business." I started my career in sales operations and progressed into some leadership roles around technology initiatives with Ameritech at one point, and then with Novell. As part of my career, I spent the last seven years with eBay. That's where Andy Yasutake and I worked together prior to coming to Marriott.

Coincidentally, I have a neighbor that was a leader at Marriott, and one day while we were socializing, he mentioned there were a lot of big opportunities they were trying to look at technologically. As we were talking about what I had been doing at eBay, he was like, "Wow, we need to do that at Marriott!" It turns out that he went back to his leadership team, and they reached out to me about helping them make some transitions at Marriott's Customer Engagement Centers.

THOM MCDANIEL

Vice President, CEC Product & Site Services

At the time, they had been progressively moving toward changing their support model. Marriott's Customer Engagement Centers started off as Reservation Centers. Their entire job was just to book reservations. It has now become more of a broad customer engagement model where we service things. I had a lot of experience with both Novell and eBay that lent itself well to this Marriott experience. I had been working in Silicon Valley most of my career and thought it was time to venture out into travel and hospitality and venture into a different space.

In my day-to-day role, I have a broad set of technology teams, including an infrastructure team that supports our centers and our remote associates globally. I have several people stationed around the world in our 20 different contact centers that support the infrastructure in those centers directly. Roughly 80% of our organization today is now remote, which is crazy because we were the inverse of that when I first started at Marriott.

It was still a pilot six to seven years ago. I have a product team that is focused on product roadmaps, strategies, and initiatives related to core technologies, including voice architecture, IVR, survey platforms, workforce management platforms, and several reporting mechanisms within our business. Additionally, I have a team that drives the product focus for our reservations platform, our loyalty platform, and what I call our customer relationship management platform. They work with vendors as well as with our corporate IT functions to deliver these product-focused tools for our Customer Engagement Centers.

EITK: You've probably seen a tremendous amount of change in just the last couple of years. Can you explain these transformations?

Thom: Two weeks after I joined Marriott, they announced that they were acquiring Starwood. For the past three to four years, I had been in merger and acquisition mode for the technology space. I had just come from eBay, where I helped lead the separation of PayPal from eBay. At one point, we decided to make a case for integrating and transforming our two different customer engagement businesses into one. However, we wanted to optimize it in such a way that we could create real savings for the company while at the same time improving customer experience.

We partnered with Deloitte and began a three-year journey into expanding our use of Salesforce by using other channels such as chat, messaging, and expanding the use of Natural Language IVR. Our focus was centered around how we could provide more self-service opportunities for our customers, as well as

better routing and optimizing our occupancy within our service centers across the globe.

With Marriott's model being quite different from Starwood's, we had to look at how we could distribute volume contacts across all our centers and optimize where we were sending them. We made significant efforts over that three-year period to drive about $100 million dollars annually and savings for Marriott. It's an exciting change.

From a transformation context, the pandemic has created what I call the next catalytic event. When we think about Marriott as Customer Engagement Centers, it's becoming more about the people – where they're at, how they operate and engage, how you support them, and how they support the customer. There are a lot of new realities, both in the marketplace and when it comes to customer expectations, that have caused us to rethink our transformation.

EITK: How would you describe Marriott's culture, its values, and the overall mission when it comes to serving Bonvoy Loyalty Program Members as it applies to CX-related technology?

Thom: Marriott's Bonvoy Loyalty Program is a fundamental part of its business. It's key to Marriott's long-term strategy. The Starwood acquisition was to merge those SPG programs with the Marriott Rewards Program and take
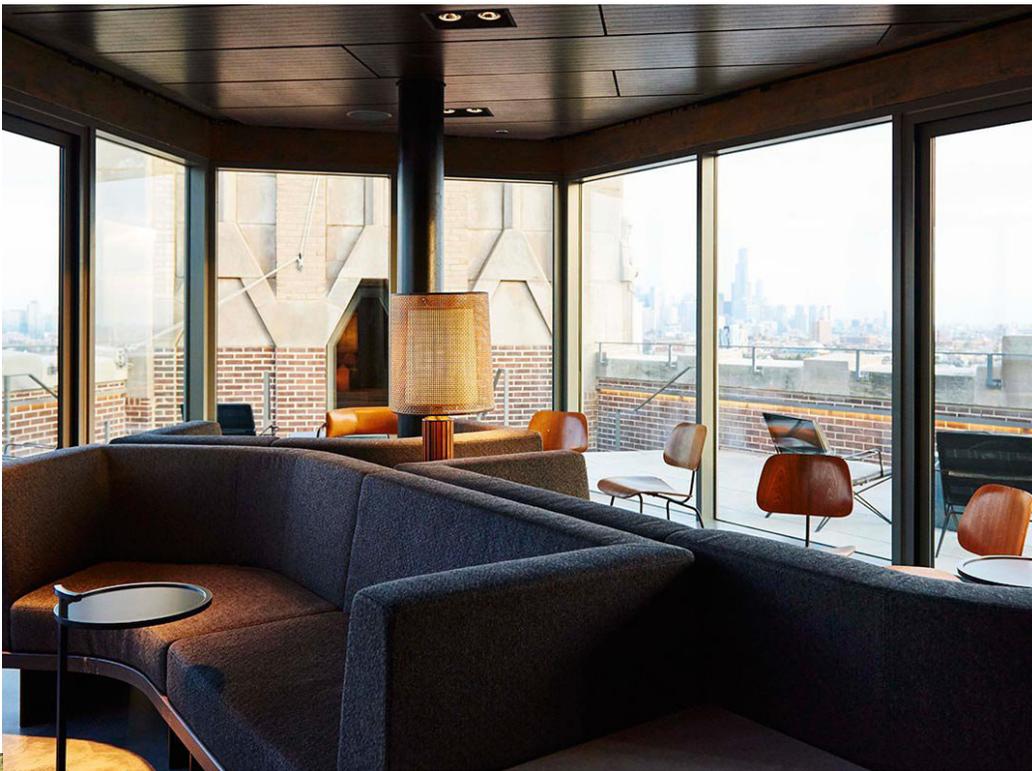
When we think about the CX strategy, it's a balancing act, particularly if you think about IVRs. I don't know anybody that likes to deal with an IVR. Also, a lot of customers don't like to deal with calling in and talking to somebody, and they don't like to wait. Although, to some degree, I think COVID did change that a little bit. What we're finding is that customers' tolerance in terms of waiting on a phone line has improved depending on the topics they're calling about.

That said, I work with my self-service teams quite a bit to balance this idea of deflecting or containing contacts from a cost perspective. How do we create an experience that allows a customer to get what they need as fast as possible? Depending on the customer and their intent, that means directing them straight to an associate. We have logic and rules in our process and tools that will push you straight to an associate. However, we are aware that there will be times when our associates can't do much more than a bot that we implement.

It's been crazy, especially for the airlines, which have been struggling. I travel quite a bit for work, and I've had four-hour wait times on some of the airlines I've called into.

Thankfully, Marriott hasn't been to that point, though we are challenged with staffing because dynamics and the surge of business has changed since people came out of COVID. There's this huge desire to travel, and so, it's been interesting, but we try to manage the customer experience in such a way that it balances the degree to which we

the best of both of those programs and, at the same time, increase the size and scope of this community. We've looked at how to differentiate service for our premier customers, and we've tried to implement that in both our soft skills and the maturity of our associates.

We have also thought about how we manage those customers as they come into our business, and then, ultimately, how we care for them through their overall engagement. From the point of initial interest in booking a stay with Marriott to the booking process and their actual stay, we are trying to improve that hand-off across the different Marriott teams that are servicing them.

Culture is a huge part of Marriott. Every time you hear any of our senior leadership, there's always a reference to culture. While we are now a multi-billion-dollar company, it's a family business at its core roots. Mr. Marriott has a famous quote about taking care of the associates, so they'll take care of our guests, which permeates through a lot of the business.

use technology to deflect or contain the IVR in a chatbot with the need to satisfy customer requests.

Expectations are definitely changing, and what people are calling about is changing on a regular basis, too. We're constantly managing that and trying to create better experiences because, as technologies improve, we are trying to make it more intuitive.

EITK: What are some of the ways Marriott is using technology to differentiate itself from its competitors to improve the customer experience?

Thom: There are a lot of different technology silos within the operation. You have the digital experience of Marriott.com, and you have the mobile app, where Bonvoy Members can interact with both properties, as well as our service organization, through those apps. We've

been trying to make that more robust and seamless across that flow.

At the same time, we're using the contact centers and the Customer Engagement Centers as a key foundation for that interaction. Tying those things together has been a huge amount of effort, but it's really paid out in terms of our customer experience.

When loyal Marriott customers find out I work for Marriott, they are always telling me how awesome the Bonvoy app is. Today, it's becoming more table stakes. We're looking at how to change out our core platform. Currently, we run on our reservations platform and our loyalty platforms, which are decades old.

Right now, we're looking at making sizeable changes in our infrastructure of our core platforms to open a lot more opportunities and influence the travel experience. Overall, we are

giving people a lot more choice in how they create their own experiences.

EITK: Can you talk about how Mariott approaches silo busting and building out cross-functional teams for large initiatives?

Thom: When we were going through the Starwood acquisition, we started to build some muscle in that space, because there was a necessity technologically but also functionally to figure out how to build those teams to address core use cases across the business. Loyalty no longer sits all by itself.

Loyalty as a program is intertwined with the digital experience, the customer engagement experience, and property experience. The technologies, functional areas, and how you talk about functional use cases and customer journeys must be connected. If you don't talk about things end-to-end, you end up dropping these customers in these silos, and it creates poor experiences for them.

As we have begun to make changes with our core reservations platform, loyalty platforms, and our property management platforms, there's been a huge investment from Marriott. The company has been focused on standing up the right organizational infrastructure to create and support the right teams. We are also spending a lot of time discussing how much to invest in maintaining and continuing to enhance our current environment at the same time as we are making transformations.

Big initiatives struggle with the devil being in the details. We are trying to get more real about the customer experience and how it applies to these tools and these processes that we are now introducing. It's easy to sell a big investment while talking about all the possibilities, but you must think about what the roadmap looks like to get to the

possibilities. That's been most of the activity over the last six months here at Marriott. We are getting better at defining that roadmap and telling the story of that progression versus what it's going to look like when we get there.

EITK: What are some of the technology changes that were put in place during the pandemic that have become a core part of the business?

Thom: The travel industry was affected significantly – it literally dried up overnight. We were scrambling at a corporate level to make sure we had a good handle on getting our cost structures under control and how we were supporting our properties, ownership, and so on. We are still trying to recover from staffing challenges.

The perspective of employees has changed regarding what type of work they want to do and how they want to do that work. Within our area, the channels themselves became extremely critical to us in how we were able to adapt to the types of topics that were coming in, the contact volume and where it went, and how we created more self-service opportunities.

We went from approximately 30% of our workforce being remote, particularly in North America, to roughly 80% of our business being remote, which changed a lot of things.

Expense structures needed to be put in place to achieve this at scale because we were losing some economies of scale with desktops. We had to be very flexible in how we delivered customer contacts to our associates and deployed technology when we made changes to telephony infrastructure and moved to a cloud-based platform because we never knew where people were going to be around the world.

I think the other part of our business that has been so challenging is the return. We expected things to come back slowly following such a dramatic dropoff. However, we just announced our Q2 numbers, and we have already exceeded our record high point in 2019. You can't do that without both technology and the right mechanisms in place.

EITK: When you look toward 2023 and beyond, what initiatives are you excited about?

Thom: I'm excited about the large-scale investments Marriott's making to change our platforms and introduce more travel marketplace capabilities as opposed to just room bookings. The fact that we'll be able to offer more integrated capabilities with our loyalty program and services that play into the digital experience, including our mobile app, speaks volumes about how we plan to move the needle for our customers and guests. Within our engagement centers there are increasingly more opportunities centered around channels and how we can add value to these channels.

The piece that's most interesting for me personally is how we create closer engagement with our remote workforce. I'm eager to learn how we provide better training and coaching capabilities and keep them engaged in the culture when everybody is remote. I think the traditional models of engagement are changing. Ultimately, technology opportunities are going to lead to better customer experiences, better engagement experiences for our associates, and better ways to work with our team.

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BONVºY

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Is It Time to Increase Your Investment in Agent Quality?

Great organizations commonly look at the end-to-end experience a customer has with their brand; but what about the employee experience?

by Execs In The Know

Over the past couple of years, customer experience (CX) organizations were forced to redesign and/or accelerate strategic and operational roadmaps to accommodate the unprecedented shift in the way, the place, and the manner that work was done. Much of this massive effort was focused on fast-tracking technology investments to power the work-from-home environment, including new contact center infrastructure and self-service tools. This work was required to keep customer service operations afloat during the pandemic and into the new era of remote/hybrid work environments.

Some believe that these investments, which were technology-heavy, have come at the expense of our employees, requiring us to take a fresh look at the agent experience. Recent job reports[1] support this belief, signaling that

the Great Resignation may lead to long-term talent shortages and additional turnover. Conversations about how to increase agent satisfaction, engagement, and empowerment are now at the forefront for many CX leaders. A key factor in this agent experience discussion must be the investment brands are making in agent quality.

Defining the Quality of Agent Experience

When surveying the landscape and defining the best response to our current environment, a key consideration is how we define quality in relation to the agent experience. Quality is more than a simple score attached to a customer interaction. Instead, quality is about the entire agent experience. Great organizations commonly look at the end-to-end experience a customer has with their brand; but what about the employee experience? Deeply understanding the agent experience is a great way to know what they expect, need, perceive, and do. It is key to delivering the kinds of experiences that keep agents happy, thriving, and delivering incredible CX.

Does your organization need to redefine or expand the way it looks at agent quality? If so, getting started is easy: journey map the end-to-end agent experience with quality as your focus.

Some key considerations include:

- Start at the beginning. What can the recruiting, hiring, and onboarding experience tell you about the quality of the agent experience? Look at the messaging,

the way the job opening is marketed, how the interviews set expectations for the role, and what onboarding reveals about how the employee is being welcomed to the company. Ensuring that this process gauges the candidate's passion for the customer service experience is also a key part of hiring the right person for the job and can be an indicator of the quality of their future performance.

- Training is a critical part of the agent experience when it comes to quality. Of course, training needs to include the operational basics, but is your training also designed and delivered with a laser focus on how to deliver quality interactions? Training should cultivate the agent's passion for the brand and products as well as the compassion they need to show to customers that reach out for help. The best training to showcase a great agent experience and ready them to deliver high-quality interactions is training that teaches not only what to do, but how and when to do it, and why it should be done to benefit the company, the customer, and the customer service team. This approach increases agent understanding, buy-in, and focus on quality.

- Once agents are hired and trained, how do the ongoing support systems reinforce and reward quality interactions? Do agents have ample opportunity for uptraining, career development, and rewards and recognition? In addition, the resources offered and prompted for employee well-being and mental health are increasingly necessary. An environment that supports the employee as a human being is more important than ever to the quality of the agent experience.

- When agents start taking contacts and interacting with customers, a key factor in high-quality experiences is empowerment, particularly with process and tools. Are there processes in place that limit the agent's

ability to deliver quality interactions? What tools empower the agents to focus on resolution and next best actions? These are critical elements of a high-quality agent and customer experience.

Based on what you learn in this exercise, you should be able to easily identify where additional investment is required to improve the quality of your agent experience and their performance. What you are likely to find dovetails with what you already know about your customer expectations. Looking at it through the employee lens, agents want to be part of a brand that shows empathy, is easy to work with and for, and rewards and recognizes quality performance and loyalty.

Involving Agents in Technology Investments

Even as the conversation and investment shifts to support agent quality, technology spend remains critical to delivering great CX. One way to marry these two potentially opposed agendas is to include your agents in technology-investment planning. Agents, like no other employees, have their fingers on the customers' pulse in real time, day in and day out. So, why not go to the source as you plan for what's next in building out your technology roadmap? Getting agent input will provide critical insight into what's needed to improve these tools and increase quality.

Agents will have perspectives on ways to improve many components of the tech stack, likely beginning with their desktop. To the agent, the desktop is the backbone of the stack, since customer relationship management (CRM) technology helps agents guide the interaction and access, review, and update contactor data. Engaged agents will be able to easily identify CRM improvements to help increase their access to information, productivity, and quality scores.

The same is true for self-service tool innovations. Our recent research report, *Self-help Solutions: Exploring Consumer Experiences, Preferences, and Opinions,*[2] emphasized the importance for organizations to get self-help tools right before deploying them. Customers want self-help solutions that are capable and relevant; otherwise, they want human agents. Agents can help identify the contact types that are more efficiently and effectively handled via self-service. They can also provide insight into those interactions that require human touch due to the sensitive nature or complexity of the contact.

An additional area where leaders and developers can learn from agents is the organization's routing scheme and channel mix. Helping customers get to the right channel is critical to resolution and satisfaction of the customer and

the agent. Right channeling[3] is about designing service journeys, so customers are routed to the channel most likely to provide the best possible engagement, experience, and resolution. Agents understand this concept and can share real-world examples to help influence the right channeling strategy.

Gathering agent input and feedback throughout the entire process – from initial scoping and planning through the development, launch, and maintenance phases – should be standard operating procedure for companies seeking to deliver stellar customer and employee experiences. This collaboration and inclusion is valuable in increasing agent empowerment and helping them feel heard, leading to a better employee experience. In addition, gathering and acting on this input will provide critical insight into what is needed to improve the tools that power interactions and increase agent quality and performance.

Achieving the Right Balance

A CX leader's work is often a balancing act. Is it time to balance the massive technology spend of the COVID era with investments in agent quality? Two key factors may make the answer to this question a resounding yes for your organization:

1. Recent research confirms that customers still prefer humans over self-service tools. For many interactions, customers believe that the human touch trumps technology.

2. The Great Resignation is not a short-term phenomenon, and companies likely will still struggle with hiring and retaining enough employees to meet service-level and satisfaction targets.

As you try to achieve the right balance, focus on efforts that improve the quality of the agent experience and performance. Well-trained and empowered agents receive and deliver higher quality experiences.

When humans and technology work in harmony, your organization can better balance the needs of your agents, your customers, and your operational goals to deliver an improved overall experience for all involved. ✳

Links:

1   https://www.forbes.com/sites/johnbremen/2022/08/25/2022-mid-year-check-in-tracking-changes-on-risk-covid-the-great-resignation-hybrid-work-esg-and-more/?sh=257db5c57c5c

2   https://execsintheknow.com/wp-content/uploads/2022/07/Self-Help-Solutions_Consumer-Research_July-2022.pdf

3   https://execsintheknow.com/magazines/january-2021-issue/a-practical-guide-to-right-channeling-in-2021/

The speech bubbles at the top of the page contain the following text:
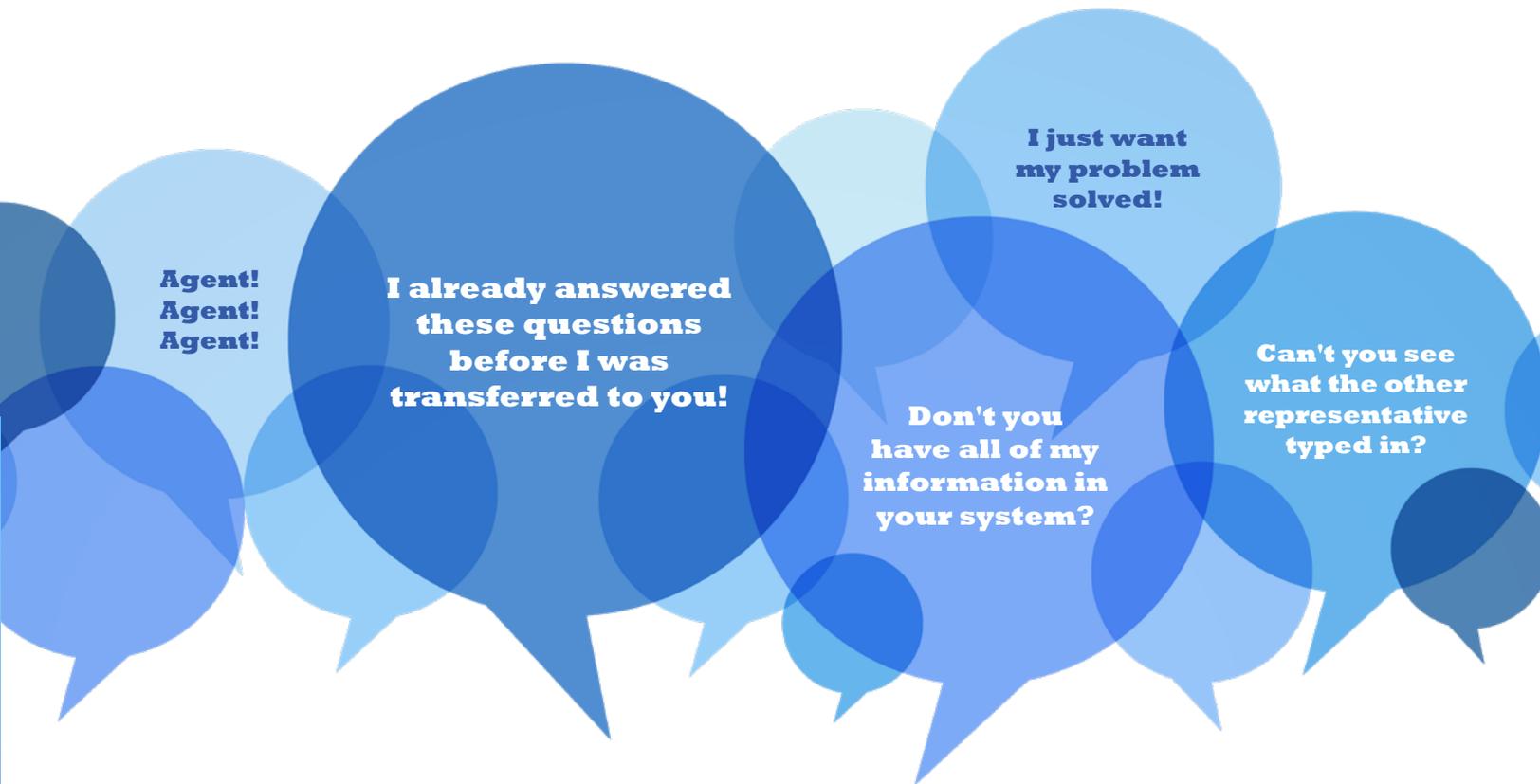
Agent! Agent! Agent!

I already answered these questions before I was transferred to you!

I just want my problem solved!

Don't you have all of my information in your system?

Can't you see what the other representative typed in?

"Are You Contacting About…?" Understanding Customer Intent to Accelerate Resolution

Investment in technology designed to improve customer and employee experiences is rapidly increasing. But tools alone won't get you to the top.

by Andy Leach, Sr. Account Executive, PTP

As Customer Experience (CX) leaders and customers ourselves, we intimately understand the power of these quotes. Let's just say we really get it! We strive to balance the needs of our customers with the needs of our business and teams. We look for ways to keep our operations running smoothly and efficiently while ensuring that our interactions are effective and totally satisfy the customer. We analyze the tactics that power our day-to-day operations and investigate innovations that we can lace into our long-term strategy.

Specifically, we try to give customers choices, keep them informed, and have empathy for their situations while we manage our teams, budgets, and operating plans to attain our key performance indicators (KPIs). But at its core, this work is about taking what we know about customers to predict their needs and using that knowledge to get ahead of those needs, delighting them, and our CFO in the process! At PTP, we help our clients identify and implement opportunities to do just that. In this article, we share some solutions that can help your organization understand customer intent and speed up resolution.

Technology to Guide Your Customers

One incredibly frustrating customer experience is being transferred from agent to agent and forced to answer the same questions again and again. In addition to degrading customer satisfaction, transfers increase handle time, tie up agents unnecessarily, and create a poor agent experience. How can you reduce these resource-draining experiences? Top organizations are enthusiastically adopting machine learning in a variety of ways to understand intent and get customers to the right place the first time.

RECENT EXECS IN THE KNOW RESEARCH[1] REVEALED THAT 51% OF CONSUMERS PREFER TO CONTACT CUSTOMER CARE VIA PHONE OR IN-PERSON. A GREAT START TO THIS VOICE JOURNEY IS CONVERSATIONAL IVR!

One advancement is conversational interactive voice response (IVR) that uses speech recognition and natural language understanding to gather customer intent and route the caller appropriately. Machine learning is becoming increasingly effective at detecting the nuances of modern conversation and

helping guide callers to the correct place. When married with customer data, a conversational IVR can create the dynamic personalized interactions that customers crave.

A leading financial services provider client of PTP uses this technology to help improve the efficiency and effectiveness of routing. The company's product portfolio is extensive, so forcing customers to sit through a long menu of product options is a waste of time for the customer and resources for the organization. Instead, the customer can simply describe what they need in their own words. Once they get to the right line of business, the technology can deliver a personalized experience based on recent or regular transactions that occur. For instance, if the customer asks to access their checking account, the system can detect a recurring event (e.g., paydays or transfers) and ask the customer if that is the reason for the call. This "most likely contact" functionality helps the bank understand – even predict – intent and accelerate resolution, which is a win for both parties.

Another artificial intelligence-powered solution that leaders are using to better understand customer intent and reduce resolution time is speech analytics. Once intent is established, speech analytics technology can detect emotions and sentiment to ensure the customer's issue is being resolved swiftly. These natural language tools can identify when customers are frustrated, upset, confrontational, or even stressed. In real-time, a manager can intervene to help the agent or take over and resolve the issue; for recorded calls, coaching opportunities and process improvements can be revealed and addressed.
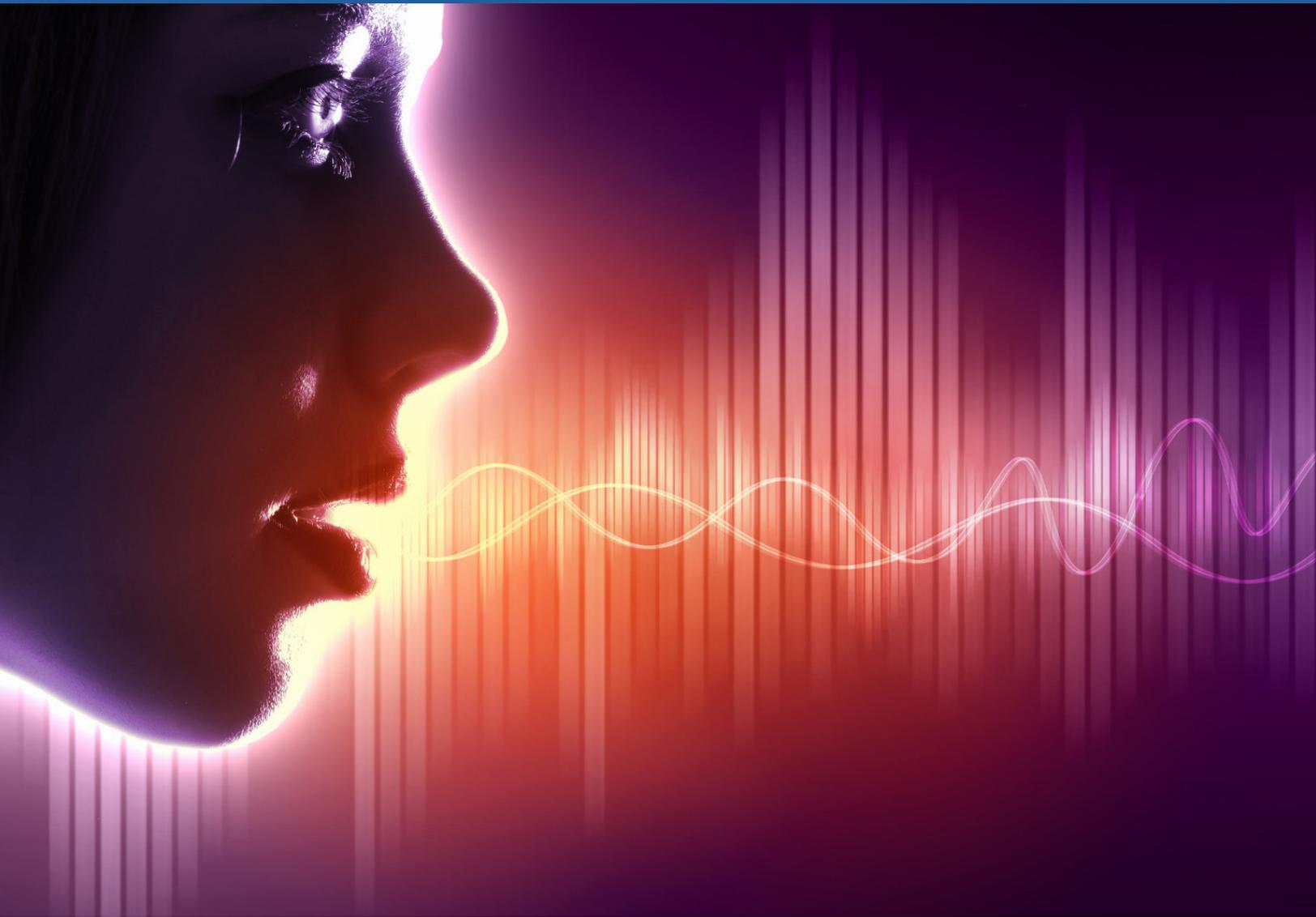
Speech analytics can increase cost savings of up to 30% and customer satisfaction score improvements of 10+%, according to McKinsey estimates[2] — compelling considerations for this technology!

This solution is being successfully used at one of our healthcare insurance provider clients, where reasons for contacting customer care can be emotionally charged and resolution can be complicated to understand (deductibles, anyone?). Although agents typically do their best to help, sometimes exchanges are fraught with problems that need to be addressed. Real-time speech analytics can detect these interactions and alert supervisors to intervene and help the customer. Further, this technology records these interactions, which become great post-contact coaching opportunities to advance performance improvement goals.

Real-time speech analytics technology can also be used to help an agent during a live interaction by analyzing the conversation and suggesting the "next best action" for the agent to take based on that analysis. Although this is not widely used at this time, the potential for greatly enhancing agent efficiency, increasing consistency in customer handling, and speeding resolution is limitless. Another positive benefit is reduced onboarding and training time for agents, increasing their

skills, cannot be learned. With self-service and automation technology servicing more and more of our customers, agents are getting the more complex, more difficult to resolve, emotional contacts. This makes an agent's desire to serve even more important to delivering positive CX. Regularly taking a hard look at your employees' performance is required to ensure you are getting the most of your tech investments.

The same is true for the third critical component in the CX trinity: process. Top-performing organizations ensure technology implementations include work to understand the implications on existing processes. In a recent technology implementation, we helped a client uncover several antiquated processes that were dragging down customer and employee satisfaction. Despite their multi-million-dollar tech investment, this organization would have been unlikely to recognize the return because of the outdated processes that were in place.

In addition, leading companies ask themselves what should change as a result of new technology deployments. Only after you understand how processes need to change with new advanced technology in place can you reap the full rewards and see a return on your technology investment. Finally, ensuring that you have a sound continuous improvement program is critical. Technology updates and market shifts require leaders to have a way to keep processes updated as well.

productivity and positive contributions to individual and organizational KPIs.

Supporting Your Technology Investment

Investment in technology designed to improve customer and employee experiences is rapidly increasing. But tools alone won't get you to the top. We all know the CX trinity: people, process, and technology. So, it should come as no surprise that winning organizations also allocate resources to people and process.

In the people category, a great place to start is ensuring that you have the right team members in your organization. Perhaps the most important attribute of CX employees is that true desire to understand what they can do to help customers. Many believe that this is an inherent characteristic that, unlike technical

client business. Andy joined PTP four years ago because they partner with organizations to provide innovative CX solutions that transform customer engagement across marketing, sales, and contact center. Being technology-agnostic, PTP brings a unique perspective across people, process, and technology solutions.

PTP is a professional services firm delivering innovative customer service solutions across contact center infrastructure platforms that cut costs, enhance investments, and improve customer satisfaction.

Learn more at ptpinc.com

Summing It Up

Today's technology- and data-driven world means deeper, often real-time, connections to our customers. And they want help faster than ever before! Advances in machine learning are powering new technology to help customer service teams understand intent and accelerate resolution for customers in need. Organizations are using conversational IVRs and real-time speech analytics to help achieve this goal. When combined with necessary changes to people and process, technology completes the CX trinity. This approach is tried, tested, and proven to increase resolution, deliver frictionless service, and improve experiences
for customers and agents.

Links:

1   https://execsintheknow.com/wp-content/uploads/2022/07/Self-Help-Solutions_Consumer-Research_July-2022.pdf

2   https://www.mckinsey.com/capabilities/operations/our-insights/from-speech-to-insights-the-value-of-the-human-voice

Andy Leach
Senior Account Executive

After 20+ years in the Enterprise Software space, the most personally rewarding achievements for Andy have come from providing ideas, solutions, and value that make a significant impact on

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How to Get the Most from Your Customer Experience Outsourcing Partnership

Tips for finding the right partner and structuring your relationship to ensure long-term business success in challenging times.

by Pete Tapley, Vice President, Customer Experience Innovation, TELUS International

Change is in the air.

It's not just the falling leaves, shorter days or cooler temperatures that are typical this time of year in the northern hemisphere, but rather a fundamental shift in how businesses operate. Among the ongoing challenges presented by the COVID-19 pandemic, foreign exchange pressures, armed conflicts, rising interest rates, and fierce competition for top talent, companies are in a state of flux as they try to accomplish more with less.

Businesses are evolving out of necessity, and so are their outsourcing partnerships. In the past, buyers primarily focused on leveraging multiple service providers for cost reduction

and risk mitigation. However, new [research commissioned by TELUS International](#)[1] found that half of the surveyed enterprises have reduced their customer experience (CX) provider footprint over the last 12 months, with 51% using a single provider, and 44% engaged with only two to three providers.

Enterprises are rethinking their existing customer experience partnerships to form fewer, stronger, trusted relationships that encompass an increasingly wide range of capabilities. Given the trend toward consolidation and the pressures to stretch budgets even further than before, companies need to structure their remaining outsourcing partnerships in such a way that ensures they have the right people, processes, and technology in place to deliver on their customer experience vision today and well into the future.

Survey Says: Fewer CX Partners, More Outsourced Services

The business process outsourcing (BPO) consultancy firm Ryan Strategic Advisory

conducted a survey on behalf of TELUS International that gathered insights from 668 global executives with strategic decision-making authority over contact centers within their organizations. In addition to learning that the majority of leaders today are selecting and working with fewer CX partners, the survey found that companies are outsourcing more services overall. Survey respondents indicated that they have engaged a single CX partner for complex services such as artificial intelligence (67%), digital IT (68%), content moderation (72%), and digital CX (77%).

For many leaders, an offering that includes end-to-end [customer experience solutions](#)[2] is a baseline requirement when it comes to their outsourcing partnership. Nearly 40% of the executives surveyed indicated they would leave a CX provider if they were unable to provide all the complex digital CX services they needed.

In addition to the scope of their offering, executives highlighted three important factors when considering contract renewals with an outsourcing partner:

CX services most pervasive across BPO deals

What services do you receive from any one CX provider?

AI data solutions (data creation, data collection, data labeling)	Digital IT services (cloud migration, cloud hosting, CCaaS)	Content moderation and social media solutions	CX (voice, live chat, etc.) and Digital CX (chatbots, automation, etc.)
67%	69%	72%	77%
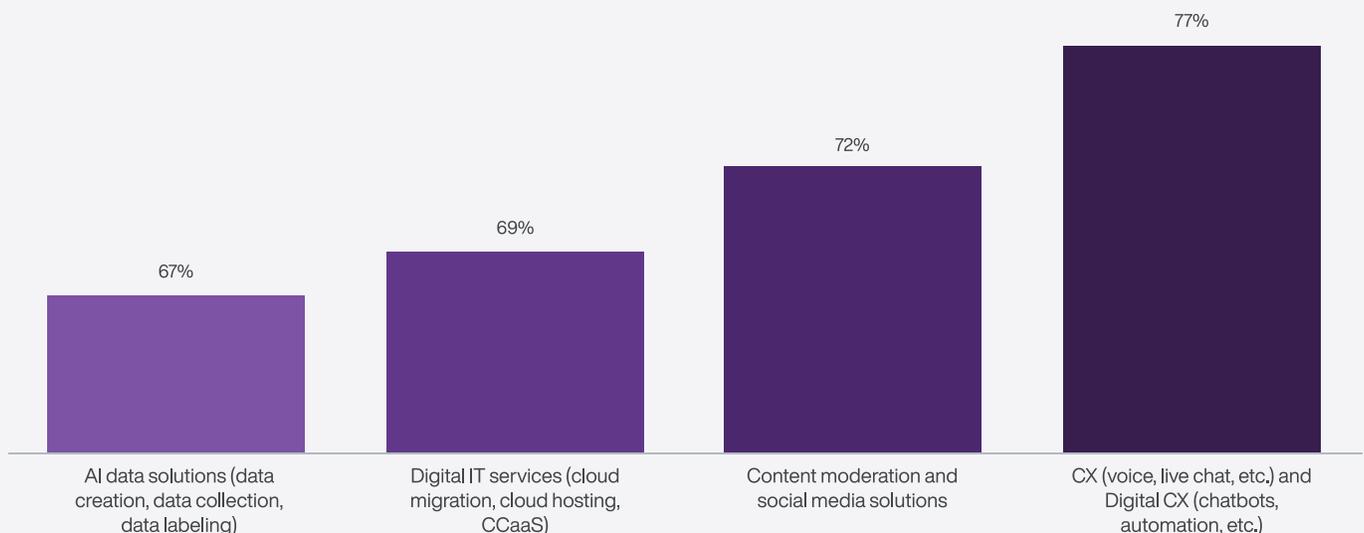
- the ability to scale (69%)

- the ability to meet KPIs consistently (65%)

- the ability to meet language requirements (61%)

These factors work hand-in-hand. Scaling often requires additional language requirements to meet growing international demand and to serve new markets, and the ability to consistently meet KPIs can be considered a standard expectation with any service level agreement.

More surprising, perhaps, is that cost was not listed as a prominent deciding factor in renewals. In fact, less than half (41%) of survey respondents indicated competitive price was important in their decision-making. Leaders today are prioritizing quality over cost with the understanding that sacrifices in customer service can end up being more expensive to businesses in the long-run. This does not mean that cost is irrelevant, but, rather, emphasizes that the real value lies in a partner with a diverse offering and the ability to deliver.

Six Ways to Get More from Your CX Outsourcing Partnership

As the research suggests, executives are looking for more in their outsourcing agreements.

Smart buyers look for a partnership that will capitalize on industry expertise and experience, leveraging unique resources and skill sets to drive their customer experience further, faster. The following are some of the strategic ways executives can get more from their CX partnerships.

1. CO-INNOVATION

Co-innovation happens when two or more organizations work collectively to develop products, services, and/or solutions. Working with an external partner brings new perspectives that enable companies to predict and meet consumer demands at an accelerated pace. As an added benefit, co-innovation also tends to reduce risk through the sharing of resources, best practices, industry insights, and cross-industry experience.

Given the fast-paced and competitive business environment, digital solutions are enabling leaders to get an edge on the competition. But it's not always possible or even ideal to develop those solutions single-handedly. Working with a CX partner can help to accelerate digital transformation and solve problems more efficiently by bringing unique perspectives and out-of-the-box solutions to the table.

2. PROCESS IMPROVEMENT

The right CX provider will strive to understand your customer journey inside and out. Their team of experts will be able guide and support your business strategies by breaking down barriers, connecting disparate organizational silos, and identifying the right priorities to enable a successful business transformation. They should also be able to provide robust customer journey mapping that aims to simplify touchpoints to reduce cost and effort for a seamless experience across channels.

3. EMPLOYEE MANAGEMENT AND ENGAGEMENT

Your CX partner is nothing if not an expert in

Co-Innovation Case Study:
iLabs Center for Innovation

iLabs[3] is TELUS International's formal R&D initiative focused on redefining the ways in which humans and technology interact. Working alongside our clients, we leverage a wide array of leading-edge technologies, including augmented intelligence, big data and analytics, cloud computing, blockchain, and more to create disruptive CX solutions.

Recently, our iLabs team helped one of the largest U.S. broadcasting and cable service providers upgrade their ordering solution. Their initial progress was hampered by the complex order flows that lacked basic functionalities like upgrades, porting, back-end system integration, and the onboarding of new affiliates and partners.

Our teams worked collaboratively to develop an end-to-end solution that featured a unified user experience for both contact center employees and in-store sales representatives, as well as a flexible interface framework that could be integrated with third-party systems. As a result of this co-innovation partnership, the client's sales conversion rates increased by approximately 15% and order completion rate increased by an impressive 7%.

employee management. Tap into that wealth of knowledge to help facilitate customer-centric cultures, streamline operations, and reduce attrition by sourcing, managing, and training top talent.

As a prerequisite, you will need to ensure strong cultural alignment[4] between your company and your CX provider. The more that a company's stated values match with its real culture on the ground, the higher the team member engagement and the lower employee attrition. Long-tenured, experienced, and engaged employees serve as exceptional brand ambassadors for your company, delivering better customer outcomes and leading to stronger business results.

4. SPEED AND SCALE

Fast-growing companies need to be agile and smart with their time and resources. An experienced outsourcing partner will be able to ramp up your operations by leveraging their global footprint, along with the tools and expertise to forecast and meet demand. What's more, if you are planning to enter new markets, an outsourcing partner can set you up for success with a multilingual, follow-the-sun model of support, ensuring help is available to your customers whenever and wherever they need it.

5. AI AND AUTOMATION

With a wide range of intelligent automation

solutions at their disposal, a CX partner can help find extra efficiencies – a benefit that shouldn't be overlooked in a challenging economic environment. Many businesses who have acted upon the automation opportunity have seen exponential year-over-year cost savings.

The goal, however, should not be to introduce tech for tech's sake, but rather to work with your trusted outsourcing partner to discern how AI and automation can make things faster, easier, and better for your customers and team members alike. Robotic process automation (RPA), for example, is an application that is commonly deployed to free up time for your CX teams by handling repetitive tasks with consistent results, around the clock and at scale. Teams that deploy RPA solutions can then tackle more fulfilling assignments that bring out their strengths and keep them engaged.

6. DEEP DOMAIN AND INDUSTRY EXPERTISE

Analyst firm IDC found that nearly half of buyers (47%)[5] named "customer experience benchmarking and best practices" as an essential capability when it comes to CX providers, and rightfully so. When seeking a new partner, do not forget about intangibles like broader industry experience. A top-tier CX partner will have earned experience in your industry and in others, too; the idea that makes a big impact for your business may come from an unexpected industry or source. And if your business is fortunate or new enough to have never experienced challenging times before, you can lean on the knowledge of a provider who has.

Embrace Change and Initiate Opportunity

Winds change, as do the forces that act on every business. Success comes to those who do not wish them away, but to those who adapt. You know that change is in the air. You must change with it. Harness those winds and propel your business forward with a CX partner that brings

scale, technology, and expertise to help you deliver the optimal customer experience.

Pete Tapley
Vice President, Customer Experience Innovation

Pete Tapley is a seasoned outsourcing professional leading sales across TELUS International's global industries group. Driving digital CX innovation, Pete and his team partner with companies looking to transform and create disruptions in their industries via customer experience, trust and safety, digital IT, and/or artificial intelligence solutions.

TELUS International

TELUS International is a leading customer experience innovator that designs, builds, and delivers next-gen digital solutions.

Learn more at telusinternational.com

Links:

1   https://www.telusinternational.com/articles/resources/cx-outsourcing-research

2   https://www.telusinternational.com/solutions/customer-experience

3   https://www.telusinternational.com/ilabs

4   https://www.telusinternational.com/culture-value-chain

5   https://www.telusinternational.com/articles/resources/idc-customer-experience-info-snapshot

KIA ONLINE COMMUNITY MEMBER
SPOTLIGHT
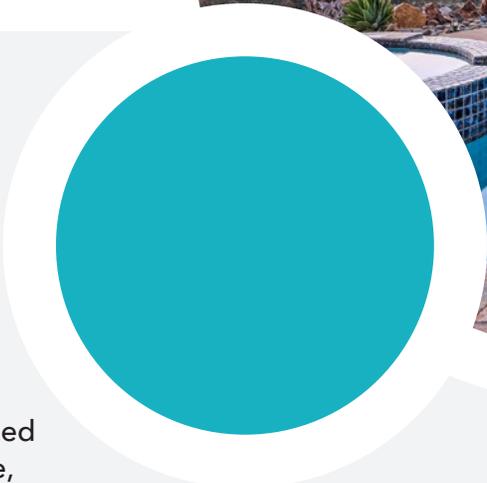
SHEILA KNIGHT-FIELDS
DIRECTOR OF GUEST EXPERIENCE

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Sheila brings more than 20 years of expertise leading people to provide five-star customer experiences. She is recognized for helping businesses rethink customer service, enhancing team member experiences, and driving workforce optimization. As the Director of Guest Experience at Evolve, it comes as no surprise that Sheila is onboard when it comes to shaking up the status quo and making vacation rentals a better experience for everyone. Execs In The Know recently caught up with Sheila to ask her a few questions about Evolve, her unyielding commitment to outstanding leadership, and how she likes to spend her time when she's out of the office.

Better Vacation Rental Experiences for Everyone

EXECS IN THE KNOW (EITK): In the travel and hospitality industry, expectations run high for customer experience. As a Director of Guest Experience, how do you keep your front-line team engaged with Evolve's core mission to bring better experiences to life?

SHEILA KNIGHT-FIELDS: Our mission is to make vacation rental easy for everyone. To do that, we focus on delivering five-star customer experiences and creating trust with our guests

and with our owners to further differentiate us as a hospitality company. Our mission and goals are woven throughout everything we do. This starts by demonstrating our commitment and reinforcing that message at both the company and team levels. Our CEO consistently shares it in monthly all-company meetings, we build it into our training, and the CX team starts every presentation with a reminder of our team's purpose of "Delivering hospitality at scale with an empowered and

engaged team that is product and process enabled and continuously striving to improve."

To bring that to life, we frequently ask for feedback from our teammates on how they're applying our core mission in their interactions. Through tools like our guest surveys, we can identify and share individual and team insights, both at the department level and the entire company, and we celebrate when teammates exemplify our purpose.

EITK: There's more opportunity than ever in the fast-growing vacation rental business, but staying competitive now takes much more. With greater technological sophistication, ever-rising traveler expectations (especially among Millennials), and stiffer competition … from your perspective, how is Evolve disrupting the industry to change the status quo?

SHEILA: We're looking for ways to leverage technology to make vacation rentals easy for everyone. That includes things for our owners, like our SmartRates (SmartRates is Evolve's proprietary dynamic pricing technology that gathers real-time market data that helps Evolve and owners make more informed, timelier, and more strategic pricing decisions) and our revenue optimization strategy and collecting and using our guest insights to work with owners to provide added value to guests. For guests, we're always looking at how we can streamline their experience and our interactions through additional technology.

EITK: As Evolve continues to scale properties on its platform, in what ways will the brand continue to remain laser-focused on fulfilling guest and owner needs when it comes to trusted hospitality?

SHEILA: As we continue to grow and scale, we want guests and owners to have the same wonderful experience they've come to expect from us. One way we do that is by using customer insights and feedback. We're always looking at what is important to our guests and iterating on our processes to meet those changing needs.

EITK: What are the key challenges or pain points the company faces when deploying data and analytics to run a successful CX strategy? Where are your wins?

SHEILA: One of our biggest challenges with data and analytics is just how much information there is for the entire guest experience. How do we take all of it and parse it down into information we can use to take action? One win this year is that our product team did an end-to-end analysis of the guest experience, figuring out where the hiccups and pain points were in the customer journey. With that information, we were able to create a plan involving cross-functional teams to work on the opportunities we saw. For example, there are several common questions we get from guests, around the same point in their experience, and we're working with our Marketing team to optimize the emails we send out so that more guests receive the information they need when they're looking for it. This in turn supports our CX team and the guest experience, as fewer people will need to reach out to us as they already have the information at hand that they need.

EITK: A consistent commitment to outstanding service is essential. When it comes to creating unforgettable and memorable customer experiences, no detail is too small. In what ways does Evolve seek to "wow" its customers?

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SHEILA: We want every guest to have a five-star experience, and if they don't, we make it right through our Rest Easy Promise. This is our reassurance to guests that Evolve properties will live up to their expectations, and our four core property standards: safe, clean, as advertised, and ready for guests. So, our Rest Easy Promise tells guests that if they arrive at a property that doesn't meet our standards, we'll make it right. What that means varies by guest, but the point is that we want guests to rest easy when they book with Evolve. If something is off, they should understand that it's not going to stay that way for long. That's how you build a great reputation, encourage positive reviews, and earn repeat guests who book again and again.

EITK: While organizations focus on incremental change, leaders such as yourself must focus on breakthroughs. Which technologies do you anticipate will help reduce unnecessary human-centered communications in the near future?

SHEILA: Technology is an essential part of the strategy, and we start by identifying the problem or opportunity and then building the tools that will empower and enable both our customers and our teammates. We're currently working on deploying a customer engagement platform to help improve the Evolve experience and thus create better guest interactions. While not new

technology, this will add text and chat to the mix in ways our guests can reach out to us so we can meet them where they're at. Further down the road, we're looking for ways to address the frequent requests and needs we see from guests, such as improving our guest self-service portal and automating the check-in process.

In the future, I can see AI (Artificial Intelligence) playing a larger role in workspaces to drive human/technology collaboration, and how we create a consistent experience across our distributed workforce.

It's important to **HAVE A TRIBE** like this to lean on, as we are all experiencing similar challenges in our roles and can learn from each other.

EITK: Most of us can look back and remember less-than-ideal experiences we've had as customers. However, even more memorable are those times when a company's customer service exceeds our expectations – even delights us. What has been your most delightful customer experience to date?

SHEILA: A recent "delight" happened when my daughter and I were shopping in a mountain resort town. In many of the stores, the employees either ignored us or were indifferent during our visit to their stores. However, in one shop, we had a completely different experience. Both the owner and the sales associate were friendly, attentive, and informative. They dialed into what we were looking at and offered additional choices that we might be interested

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in. Even though we didn't buy anything, they treated us with care and attention. After our prior experiences, I was moved to let them know that I appreciated how friendly and helpful they were. And guess which store I'll go back to in the future and recommend to my friends?

EITK: Did you always want to work in hospitality? How did you get to where you are today?

SHEILA: I was at a conference once where the keynote speaker said: "Who dreamed of leading a customer contact center when they grew up?" Of course, no one raised their hand. Like many of us, I fell into this profession. My career has always included some aspects of customer service, starting with my one and only job at a fast-food restaurant at age 15. From there, I've had the opportunity to work in a multitude of industries with the customer always at the forefront. This is something I'm passionate about, and ending up in hospitality was just a bonus. I enjoy traveling, so the opportunity to do what I love (leading people to provide amazing experiences) in an industry that feeds my passion for travel, and the opportunity to take this team to the next level, was the icing on the cake for me!

EITK: What lessons and experiences can you share as a senior-level customer operations leader?

SHEILA: First, listen to your team, learn what's working and what's not, and then actually do something with the information you've gathered. Listening to customers is critical, too and acting on those insights is paramount. Sharing your knowledge and learnings with others and then collaborating to improve the organization is also key.

> We focus on delivering **FIVE-STAR** customer experiences and creating trust with our guests and with our owners to further differentiate us as a hospitality company.

I've had the opportunity in my career to go through and apply Lean/Six Sigma methodology, which has taught me to never accept the status quo; there's always an opportunity to do better. Another key thing I've learned along the way is to make sure your team is aligned with the organization's mission, they understand it, and know how it applies to their day-to-day responsibilities and activities.

Finally, always think about how to advocate for yourself and your team. As one boss told me, "If you don't do it, who will?" I wish I had learned that gem earlier in my career!

EITK: What are a few key qualities of leaders who inspire you?

SHEILA: Some key qualities of inspiring leadership are being a visionary, authenticity and self-awareness, effective communication, and someone genuine and caring. The greatest leaders I've worked for in my career

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demonstrated all these qualities. It was motivating to me and drove me to want to succeed. They also not only created a great work environment, but helped me to learn about how I want to lead.

EITK: Even the most successful and productive leaders make outside interests and passions a top priority. How do you prefer to spend your leisure time?

SHEILA: If I could be outside every day from dawn to dusk, I would be. I am fortunate to live in the state of Colorado, and even if I can't be in the mountains, I get to see them every day. Luckily, being just 30 minutes from the hills, I get to hike on the weekends. I also love to spend time on the endless trail system in Denver to run, walk, or bike. Additionally, I like to spend time gardening (pulling weeds is cathartic).

EITK: Since joining the KIA Community, what stands out about your experience so far? What does the community mean to you?

SHEILA: The KIA Community is an amazingly helpful, passionate, and knowledgeable team of

leaders. I have reached out to the team multiple times asking for feedback and advice and the team always steps up to help. It's important to have a tribe like this to lean on, as we are all experiencing similar challenges in our roles and can learn from each other.

Execs In The Know

Thank you to Sheila Knight-Fields, Director of Guest Experience at Evolve, for her leadership, participation, and insights. To connect with Sheila, or to participate in the wider conversation, consider joining the Execs In The Know "Know It All" (KIA) Community. The KIA Community is a private, online community designed exclusively for CX Leaders at consumer-facing brands. Come learn, share, network, and engage to innovate.

Want to learn more about the KIA online community? CLICK HERE......
bit.ly/aboutkia

Interested in taking part in a future Brand Spotlight feature and sharing your story? CLICK HERE......
info@execsintheknow.com

A Semi-Automated Call Center: How to Actually Make It Work

by Execs In The Know

Human talent remains the critical element of any AI initiative.

For decades, contact centers have leveraged advanced technology — from first-generation call-routing systems to interactive voice response (IVR) systems and chatbots that millions of customers still communicate with today — to offload repetitive, Tier-1 requests from agents.

Innovations in technology, particularly the introduction of artificial intelligence (AI) and cloud-based services, have empowered businesses to make smarter decisions and proactively shape

seamless end-to-end experiences that meet both the customers' ever-evolving needs and expectations, and those of agents.

Let's take a look at how semi-automated solutions are revamping the call center, helping redefine customer experience (CX), and the ways you can make it work for your business.

The AI-Enabled Contact Center

Adapting to remote work environments, rising query volumes, and increasing customer demand continue to increase the threat of agent burnout and churn. Leaders need to depend on technology to allow agent productivity while also prioritizing their well-being.

In fact, contact centers can be seen as a sandbox for AI-powered CX. There are a range of emerging tools that are being put to the test to not only amplify retention and loyalty, but,

ultimately, profit. With the explosive growth of cloud-based solutions and machine-learning tools, robust semi-automated capabilities have been put in the hands of agents.

Semi-automated operations offer a balance between human-powered contact centers and fully automated solutions. There are still many aspects of the contact center that automation cannot handle effectively. Instead, you can semi-automate processes and allow your agents more time to focus on those tasks that require a human touch.

Division of (Human) Labor

The pandemic has changed — and dramatically heightened — customers' expectations forever. No longer will customers tolerate endless hold times or hand-offs. One bad experience is really all it takes to lose a lifelong customer.

More than ever, great customer experiences depend on the human factor. While increasingly powerful algorithms and deep learning models shape the machine that drives modern AI, human talent remains a critical element of any automated initiative. You can't expect to automate your entire call center process.

In our 2022 *Self-Help Solutions: Exploring Consumer Experiences, Preferences, and Opinions* report, consumers were persistent in their desire for easy access to live help. So, it's no surprise that more than half (57%) of consumers do not feel that brands make it easy enough to get live help[1]. It's clear to see that brands must prioritize live agent access regardless of how much they intend to invest in and develop self-help solutions.

Based on our previous consumer-focused research, the areas where consumers want agents to improve have remained consistent over time. They demand better communication skills (listening, specifically), more reliable follow-up, greater empowerment, and refined knowledge when it comes to the products and/or services they support.

As detailed in our October 2022 *CX Leaders Trends & Insights – Consumer Edition* report[2], 34% of consumers say the soft skills and agent attributes that are most critical to creating an exceptional experience when working with a brand to resolve an issue are good communication and listening.

These days, when you do talk to a live agent, incredible AI tools bring them up to speed before they even get on the line. Agents now know who you are and what you're calling about.

Empower and Upskill Your Agents

Pre-pandemic, the role of the contact center agent was already evolving.

When deciding on automation tools, you must consider how they will affect both your agents and overall operations. A key foundational element to achieve successful AI implementations now and into the future is to upskill your teams to ensure they know what AI can do and to keep their skillsets and knowledge current. These two things alone relieve human agents of huge burdens and time.

With the growing adoption and application of AI, robotic process automation (RPA), and increasing use of text and speech analytics, agents have replaced many of the repetitive aspects of delivering on CX. Now, agents are finding themselves liberated to focus on delivering differentiated service to customers when it comes to empathetic, human-to-human connections.

However, when using more complex technology and considerable empathy skills, agents require completely new skill sets, including

emotional intelligence, analytical and problem-solving skills, understanding the hidden sentiment in customer interactions, and more. In addition, they must also be empowered to act appropriately to deliver long-term, positive customer outcomes. At the end of the day, agent empowerment drives customer delight. Agents are a significant part of the AI story and critical to the adoption of its technology in contact centers.

When you reskill agents, it gives them the chance to handle more complex calls and even provide customers with high-touch experiences, such as personalized offers. Moreover, agents who experience higher value work can see a clearer path forward when it comes to advancement within the company.

To manage complex and high-value interactions, agents should not only be likable, but have high cognitive ability and strong interpersonal skills. Forrester[3] estimates that, collectively, organizations have earmarked an extra $8 billion for hiring agents with the capabilities to excel in this new environment.

Traditional vs. Non-Traditional Training

Did you know that the average 500-seat call center allocates $2 million a year in staff hours to coaching agents? McKinsey data suggests[4] this substantial investment does not always have the intended outcome.

That's because traditional training approaches don't meet the demand of today's training needs. Typically, training is a scheduled activity between leaders and agents, though scheduled training is often overlooked for more urgent matters. By integrating traditional and non-traditional training approaches, agents can benefit from the most advantageous deep learning experiences, while also reducing the burden on those who are training them on complex topics.

For contact centers, that means approaching training in ways that reflect the dynamic nature of the environment and supporting the learning mediums that agents prefer. One method is to apply speech and text analytics, which allows trainers to analyze the bulk of interactions coming in on the ground floor to determine what each agent can improve upon.

By tracking interactions in real-time with speech and text analytics, training becomes a proactive rather than passive exercise with each customer interaction. According to our CX Leaders Trends & Insights: 2021 Corporate Edition[5] report, 69% of CX leaders expected "Support Technologies"

to be among their top three areas of investment in 2022, with "Recruiting, Hiring, Onboarding, and Training/Coaching" a distant second, at 32%.

Simplifying Agents' Jobs, Maximizing Customer Experiences

Incorporating semi-automation is the perfect solution because it simplifies your entire operation. You only have so many agents, and those agents only have so much time. Making use of automation tools makes the most of your agents' limited time and frees them up to handle more pressing problems.

If you have been on the receiving end of a poorly automated process, then you know how painful it can be for the consumer and the agent. Using semi-automation to simplify your

agents' jobs and maximize your customers' experiences makes strong business sense, especially knowing that customers aren't entirely opposed to automated processes. A

recent survey from Tidio shows that [62% of consumers would prefer talking to a chatbot than to a human agent if they need to wait 15 minutes or more for an answer.](6)[6]

Semi-Automation Is the Next Frontier

For all the hype around AI, there are still companies that have not fully embraced it in their call center operations. Nonetheless, adoption rates are expected to soar in the coming years.

As previously mentioned, retaining human talent as a critical element of your automated initiatives, empowering and upskilling your agents, incorporating non-traditional training, and maximizing CX by simplifying your agents' jobs are the first steps. It is clear that AI is transforming the way we design, build, and deliver CX, and we anticipate that it will continue to be a key capability for years to come. �

Links:

1 https://execsintheknow.com/wp-content/uploads/2022/07/Self-Help-Solutions_Consumer-Research_July-2022.pdf

2 https://execsintheknow.com/knowledge-center/cx-research/cx-leaders-trends-insights/2022-consumer-edition/

3 https://www.forrester.com/webinar/Customer+Experience+Predictions+For+2020+Its+All+About+Proving+Business+Results/-/E-WEB29885

4 https://www.mckinsey.com/~/media/McKinsey/Business%20Functions/Operations/Our%20Insights/Smarter%20call%20center%20coaching%20for%20the%20digital%20world/Smarter-call-center-coaching-for-the-digital-world.ashx

5 https://execsintheknow.com/knowledge-center/cx-research/cx-leaders-trends-insights/cx-leaders-trends-insights-2021-corporate-edition/

6 https://www.tidio.com/blog/chatbot-statistics/
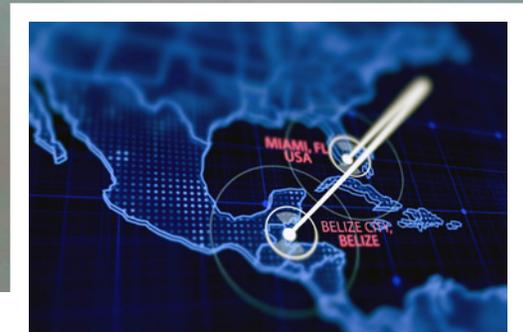
Why Having the Right BPO Partner Matters

The Answer Is Much, Much Closer Than You Think

Here's a solution to contact center staffing challenges that is "UnBelizeable."

by Kevin Herrera, Founder and CEO, Protel BPO, Belize City

Got a Problem with Labor? Get to Know Belize:

- Large pool of talented and eager candidates
- Politically and economically stable
- Close proximity to U.S. (three-hour flight from Miami)
- Strong U.S. cultural alignment
- Rapidly gaining attention from global brands

Hindrances to Hiring? You're Not Alone

Across the United States and throughout every industry, the biggest challenge companies face is access to reliable labor. In the U.S., there are 11 million job openings, but according to Randstad[1], a mere 6.5 million people are listed as unemployed. Companies are ready to hire more help, but help is hard to find.

For some companies, the labor shortage is keeping them from meeting their objectives, including new technology implementation. A new study found that among 64% of participating organizations, the labor shortage was the single most important roadblock to introducing new technology in the workplace. However, at the beginning of 2020, only 4% of companies listed labor as a major challenge.

Agent Attrition and Labor Availability: Complicating Factors in the Customer Experience

Here at Protel BPO, we know that for in-house contact centers, a difficult aspect of the labor shortage is that the rate of agent attrition is around 35 to 40%, according to Time Doctor. When considering the first 90 days of employment, that number climbs to a startling 90%. This puts companies in a difficult position, because 79% of consumers say that their experience with a company is equal in importance to the product or service they are purchasing. This finding demonstrates the increasing significance of a company's dedication to engaging a customer in a comprehensive and personalized experience. However, quality service is hard to achieve if your employees are exhausted.

In addition, companies attempting to staff an in-house contact center confront challenges around available labor. It can be difficult to recruit candidates with the right education, skills and motivation to thrive in contact center services. The pool of available labor paired with attrition rates make it nearly impossible for companies to cultivate excellent customer experiences with an in-house contact center.

The customer experience can occur throughout a variety of formats, from social media to the company's website or through an email campaign. In many instances, the customer experience includes a combination of formats.

Surprisingly, the bulk of customer service is still occurring over the phone, with Omnicus reporting that 76% of customers opt for a phone call when contacting customer service[2]. Given the current labor shortages and the importance of a positive customer experience, companies are looking outside their four walls for a solution – a solution that may be closer than anticipated.

What Belize Offers: It's Un*Belizeable*

Belize offers a different perspective on labor challenges, because there is a talent pool of highly educated candidates – and contact center agent positions are desirable and even coveted among the available labor pool. As a result, in Belize, the rate of agent attrition is only 10 to 25% among contact center service providers[3].

While that statistic alone, provided by The BPO Network, could motivate companies to consider Belize as an outsourcing destination, there are many more reasons why Belize is uniquely positioned to support contact center services. First, there are many interesting facts about Belize that are little-known to the rest of the world.

According to The Fact File:

- This beautiful country covers 22,966 square miles.

- It has a rich history and is home to over 900 Mayan ruins sites.

- Madonna's hit song La Isla Bonita is about San Pedro, Belize.

- The world's largest sea sinkhole is in Belize; the Great Blue Hole is a deep-sea diving paradise.

- Belize is the only Central American country with English as its official language.

In Belize, becoming a contact center agent is a sought-after position. The talent pool in Belize is well-educated and eager to work. Incentives at many contact centers help maintain Belize's rank as the *fourth - largest location for the contact center industry.*

Belize is a fascinating country for many reasons, but for companies looking for contact center services, outsourcing to Belize presents a competitive opportunity. Belize offers the benefits of a culture where becoming a contact center agent is a sought-after position. The

talent pool in Belize is well-educated and eager to work.

Belize Warmth: Rising in Popularity for Large-Scale Brands

Adding to the appeal of Belize is the culture of the country, which is warm, inviting, and positive in nature. The contact center service industry is thriving in Belize, and it is attractive to companies in the U.S. for a couple of important reasons:

- Contact center services in Belize are 60 to 80% lower than in the United States

- Leaders in Belize are committed to the BPO industry. Significant national infrastructure investments, including a fiber-optic network and campaigns to reduce telecom tariffs and provide incentives for new business development, have all helped contact center service providers lower costs and expand their businesses.

- Belize is a culture where becoming a contact center agent is a sought-after position. The talent pool in Belize is well-educated and eager to work. Incentives at many contact centers help maintain Belize's rank as the fourth-largest location for the contact center industry.

- The BPO industry is a major employer in Belize, with approximately 10% of the Belize workforce employed by BPO companies.

No News from Belize? That's Good News

Belize shares the language of the United States, but it also shares the American culture and time zones. It is only a short flight from Miami, and Belizeans like to joke that it's easy to have breakfast in the U.S. and lunch in Belize. Belize is also refreshingly stable compared to many other countries in the region. In 1983, the late Morley Safer, correspondent for CBS's show *60 Minutes*, famously reported, "The good news from Belize is there is no news from Belize," beginning decades of political, economic, and cultural peace in the country. Perhaps the most distinguishing characteristic of Belize is the friendliness and warmth in the culture. Every conversation feels like one with an old friend, which makes Belize an ideal source for customer service talent.

What Makes a Successful BPO Partner?

At Protel BPO, we know it's important to work with a provider that takes a unique approach to contact center services, elevating the agent experience to provide better service.

The best BPO is built on a foundation of honoring its employees. In promoting the happiness and satisfaction of their teams, agents then offer a top-notch experience to the customers they serve. There are several ways in which best-in-class BPO providers outshine their competitors to attract and keep the best talent in the BPO industry:

- **INCENTIVE PROGRAMS:** Agents participate in a points system to earn rewards and promotions. When agents are hired at the best BPO companies, they are surprised at how quickly they are recognized for their efforts, because some companies require agents to work for years before they are offered a raise or promotion.

- **SUPPORT:** Agents are offered a high level of support throughout their workday. Ideally, there are 16 agents assigned to one team lead, plus a dedicated quality assurance supervisor, creating an 8:1 ratio for agents to support personnel.

- **COMPENSATION:** The best BPO companies offer their employees fair, competitive wages.

- **COMMUNITY SERVICE:** The leadership of a best-in-class BPO is highly committed to serving the community, and they invite employees to volunteer, as well. Agents are even given the opportunity to select the organization that the company supports each month.

- **PRIDE:** The hiring process is highly selective. Employees hired by the company know they have met rigorous qualifications and they take pride in being a part of the team.

This commitment to hiring the best people and then supporting agent teams makes these BPO partners a standout in the industry, but there are other direct benefits they offer to customers:

- **VALUE:** A quality BPO provider offers a lower-cost alternative to in-house or domestic contact center services.

- **GROWTH:** BPO in Belize is thriving in a crowded industry and attracting and retaining the best talent.

- **QUALITY:** A best-in-class BPO's highly selective hiring process means that their clients' customers receive exceptional customer experiences.

Belize Is a Place Where People Can Be the Top Asset

The best BPO companies are built on an unusual concept: the idea that prioritizing the happiness, satisfaction, and support of their agents leads to better customer experiences. When agents are excited to come to work, feel supported in their jobs, and know that their efforts will be rewarded, they provide better service to customers. The company culture that the ideal BPO embraces provides a warmth and positivity that gets passed on to the customer in every transaction. And with nearshore pricing, it's a combination that is nearly impossible for companies to resist.

This isn't a magic formula, nor any kind of marked science. It's actually simple. Companies want more than customer service; they want a complete customer experience that builds a loyal relationship. Nobody provides exceptional customer services quite like the nearshore BPO because no one genuinely appreciates the natural positivity, the energy, and the people of Belize like the BPO industry.

Kevin Herrera
Founder & CEO

As the founder and CEO of Protel BPO, Kevin is focused on providing exceptional customer experiences to clients through nearshore call center services executed with the highest level of excellence. Under Kevin's leadership, Protel BPO has successfully created a positive work environment where every employee feels valued and supported, making Protel BPO the right choice for a nearshore BPO solution. He regularly spends time on the agent floor, getting involved in day-to-day operations and has grown the company to 500-plus employees since its founding in 2013.

Protel BPO, located in Belize, offers high-value, high-quality contact center outsourcing solutions at competitive rates.

Learn more today at protelbpo.com

Links:

1   https://www.randstad.com/workforce-insights/talent-acquisition/why-there-a-global-labor-shortage/#:~:text=Typically%2C%20a%20labor%20shortage%20occurs%20when%20there%20are,million%20workers%20are%20listed%20a-s%20unemployed%20in%202022.

2   https://omnicus.com/blog/contact-center-statistics/

3   https://www.thebponetwork.com/blog/what-are-the-benefits-of-nearshore-outsourcing-to-belize

On the Path to Legendary CX

Highlighting incredible leaders on the cutting edge of making CX Inspiration, Innovation, and Imagination possible.

by Execs In The Know

On the path to legendary customer experience (CX), nothing worth having comes easy. This applies to offering meaningful and memorable experiences that intrigue and entice customers to keep coming back for more.

At this year's Customer Response Summit (CRS) in beautiful Coronado, California, we will take you on an action-packed journey, and together we will draw INSPIRATION from community members, gain INNOVATION insights from our partners, and ignite our IMAGINATION to create legendary customer experiences.

As CX continues to become more intelligent, more immersive, and more connected, the guiding principles of inspiration, innovation, and imagination are more important than ever before. It's how we will separate the ordinary from the extraordinary.

Clearly, we're on the cusp of a new era, so what's next?

Follow along as these four incredible leaders share how they are creating new possibilities for their employees and customers to unleash the power of CX.

What Inspires Legendary CX?

"The first thing that always comes to mind are the words of our founder, J.W. Marriott: "Take care of associates and they'll take care of your customers." This remains the keystone of Marriott International's culture and what I believe inspires legendary CX. By reinforcing the customer experience through an associate's lens, we are not just booking and recovering, we are making personal connections. With journey-mapping, and we have the capability to see across the globe at customer patterns. We understand what information each associate needs to have to better serve the customer—what matters to our customers, their past experiences, and where the future is taking them."

SHANNON PATTERSON

Senior Vice President, Customer Engagement Centers at Marriott International

Where Will the Next Era of CX Innovation Take Us?

"Brands can be making the biggest difference by journey mapping the entire customer experience. At Humana, our human care approach takes into account every facet of members' lives. Having the necessary tools that deliver very detailed information at a broad scale will allow your associates to address customer wants and needs so you can react and stay ahead of the curve when people need you the most. That's what gets people forever dedicated to an organization when there's so many other options out there. You have to add that human element back into the mix and empower your associates to do what they can to go above and beyond what a customer could have ever expected."

ALYSSA REYNOLDS

Vice President – Retail Contact Centers at Humana

"Where the next era of CX innovation will take us is largely based on customer expectations, especially after the pandemic. Their expectation of personalized service has shifted dramatically. Customers can't simply be placed into groups based on demographics. They want to be known and they want recognition that they've contributed to your company's success. Invisible and seamless service with fewer points of human contact are what customers have come to know, expect, and want. To keep up with changing customer expectations, personalized strategies are now key."

ANTHONY CAVANAUGH

Operations Manager, Customer Relations and Services at BMW of North America, LLC

How Can Brands Bring More Imagination to the World of CX?

SCOTT HORACE

Senior Vice President Consumer Support Services at Mastercard

"Here at Mastercard, we try to incorporate imagination into our service journeys and models at all times. Organizations need to embrace being intentional with the work they do but also think past the current boundaries to deliver superior customer experiences. You must tap into your customers' imagination and fully understand both their needs and wants. Want to hit it out of the park? Figure out better ways for your employees and your customers to interact and resolve issues. You have to know your customers and give them ***everything*** they want – not just one aspect of what they want. We should always embrace imagination and never be constrained by the current way of doing things."

Looking Ahead to the Future of CX

For brands to thrive, delivering best-in-class CX is only going to become increasingly important. From the perspectives of these dynamic leaders, the CX landscape of the future will be personalized, grounded in purpose and passion, focused on empowering your agents, automated, differentiated, and intelligent.

See you in Coronado, CA (the Crown City) October 24-26, 2022, for CRS!

Twice a year, CRS brings together the top CX Leaders across industries for an experience like no other. At the heart of everything we do lies community. And CRS is no different. It is an intimate and laser-focused forum, providing outstanding opportunities to engage with some of the brightest minds in customer leadership – "Leaders Learning From Leaders."

Our next stops include Austin, TX (March 1-3, 2023) at the JW Marriott Austin and Nashville, TN (September 20-22, 2023) at The Grand Hyatt Nashville.

KIA THE "KNOW IT ALL" ONLINE COMMUNITY

LEARN. SHARE. NETWORK. ENGAGE TO INNOVATE.

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

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

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

96%
of the members say they feel comfortable reaching out to other community members for help.

87%
of the members say that community content and member input improved their quality of work.

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

YOU'VE GOT QUESTIONS. KIA HAS ANSWERS.

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

THERE'S AN APP FOR THAT

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

MAKE SMARTER DECISIONS

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

INSIDER INFO ON PROSPECTIVE VENDORS

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

YOU'RE A VIP

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

KEEP THE CONVERSATION GOING

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

1 Download the "Connected Community" mobile app on your mobile iOS or Android device.

2 Log in using our "community. execsintheknow. com" domain name.

3 Use your KIA login credentials to log in.

JOIN US

We invite you to learn more about this complimentary community today.	We'd love to have you! Please follow the link below to request to join our community.	For help with questions, a demo of the community, or to get signed up on the spot.	Is your business interested in sponsorship opportunities in the CX Marketplace?
LEARN MORE	**REQUEST TO JOIN**	**QUESTIONS?**	**BUSINESS PARTNERS**
https://community. execsintheknow.com/ participate/about-kia	https://www2.execsintheknow. com/join_our_CX_community	Email Tyler Ainge at Tyler@execsintheknow.com	Email Scott Moberly at Scott@execsintheknow.com

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