HOW TO BUILD A SUCCESSFUL CUSTOMER ENGAGEMENT CENTER

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INTRODUCTION

What exactly is a customer engagement center (CEC)?

A CEC has evolved from the standard call center of several decades ago, to now include multiple channels where customers can engage with companies. Contributing to this growth and change is the blend of social media and communities engagement with CRM (customer relationship management) software. CECs also serve more traditional channels like phone, Internet, and email.

The goal of a CEC is to provide customer service and support in each of the above channels, by implementing various technologies and business applications. What distinguishes a CEC is its ability to retain context about customers as they move across channels, while offering a personalized and engaging experience.

Why does your business need a CEC?

Because a customer engagement platform is vital to succeeding in today's environment. Customers now demand service on their terms. They want an experience that requires minimal effort and to find a solution to their issue easily. They expect service on every device, on every channel, and at anytime. Most importantly, they want you to understand who they are and any past interactions you've had with them.

CECs, which can be scaled to any size organization, are even beneficial to small businesses, where every employee is typically asked to provide customer service in one way or another. By equipping employees with real-time customer information, they have the ability to solve customer issues faster, resulting in a better customer experience.

INTRODUCTION

How do you build a successful CEC?

You've come to the right place. The intent of this e-book is to familiarize you with best practices for setting up a CEC that will offer exceptional service to your customers and, as a result, deliver higher customer satisfaction while reducing costs.

Topics we will examine include:

- Identifying your CEC strategy
- Defining the ideal customer experience
- Getting a technology infrastructure in place
- Connecting to where your customers are going
- Getting the right people in place

Let's get started!

CHAPTER 1

Identifying Your CEC Strategy

Before you set up your customer engagement center, like most things, you need to get a plan in place. Below are four best practices for getting started:

1. Begin with the end in mind

Decide on what the end result of your CEC should be. Do you want to grow revenue? Increase customer satisfaction? Create loyal customers? Once you've chosen a focus, put the right metrics or KPIs (key performance indicators) in place to track what you do and measure the outcomes.

2. Recognize common customer categories

While there are many categories your customers can fall into, these are the most common:

- **The customer you know everything about.** One example is a customer that visits your web site either from their mobile device or through your app. You are able to provide personalized one-to-one service, because you have context around who they are, what products they own and how they've engaged with your business in the past.
- **The customer you know nothing about.** This type of customer visits your web site anonymously and has to be tracked via keystrokes. With a CEC, you can collect data from these types of interactions and use it to get to know customers better.
- **The customer who knows what they want.** An example of this is an existing customer who has registered on your web site. This should give you visibility into their interaction history and purchase history.

CHAPTER 1

3. Qualify the customers in each category

Considering these additional customer qualifications will help inform your CEC set-up:

- Customers with service level agreements. (Those who purchase "platinum" support deserve higher service than those who bought "gold" level support.)
- How much the customer spent.
- The customer's potential future revenue.
- If they influence other customers or your industry. (For instance, do they speak at conferences, maintain a popular blog or have a following on Twitter?)

4. Consider which tools your employees will need

The last step in getting your CEC strategy in place is examining the tools your customer service agents/employees will need.

- Consider which channels you'll provide your customers, as well as how many channels your agents can manage at one time. For example, can your agents oversee a phone call while also managing a live chat, or will you have agents dedicated to specific channels?
- You should also determine how their computer and desktops are laid out. The objective should be to minimize the systems your agents are switching between to effectively serve/satisfy the customer. This can be done by linking to the appropriate backend systems so the right information is pushed to their screen.

CHAPTER 2

Defining the Ideal Customer Experience

When designing your CEC, it is important to both lower the cost of interacting with customers and prospects (to protect your business's bottom line) while still maximizing your customers' experience with you. This is one reason why the right CEC is so important. It minimizes the burden on you while offering faster and better service to the customer.

Here are three ways to define the ideal customer experience:

1. Provide their desired channel
This is all about giving customers their preferred way to communicate, whether it be email, live chat, social, phone, etc. Offering a wide variety of communication channels also gives businesses the option, when necessary, of redirecting customer requests to the channel where they will see the fastest response time. It is also important to keep the customers' context when switching channels so they don't have to repeat information when switched to a new channel or agent.

2. Foster customer loyalty
Identify who your loyal customers are. Now take a look at their path to loyalty and examine what triggered them to be loyal. For example, was it because of a rewards program? Or has the customer become a brand advocate due to a successful customer service experience? Once you've figured that out, you can reverse engineer that path and spread those best practices to other customers.

3. Implement flexible business rules
Use workflows that offer the ability for the user experience to be changed on the fly. This makes it much easier for the customer to interact with your business, and receive the service and support they are seeking. One example of this is turning off the live chat button when no agent is available to chat. Another example is having an agent respond to a customer question placed in a community if another community member fails to reply in a timely manner.

A 10% increase in customer retention levels result in a 30% increase in the value of the company.
- Bain & Co

CHAPTER 3

Getting a Technology Infrastructure in Place

Now that you've identified your CEC strategy, as well as what your customer experience should be like in relation to it, let's take a look at how to get the right technology infrastructure in place.

Consider the below your "check list" for the dozen features and functions the CEC solution you choose should include:

- ☐ Can connect to multiple back-end systems.

- ☐ Has a customizable and flexible experience for customers and prospects.

- ☐ Gives employees a 360-degree view of the customer.

- ☐ Can track customers from first interaction all the way through the entire customer lifecycle.

- ☐ The entire desktop of information can be transferred from agent to agent.

- ☐ Offers real-time analytics.

- ☐ Is mobile enabled.

- ☐ Manages social media engagement for customer service.

- ☐ Has peer-to-peer support (including community forums and blogs).

- ☐ Allows for the scalability of your business.

- ☐ Can accommodate any computer telephony system (CTI).

- ☐ Ability to embed support into your products and apps.
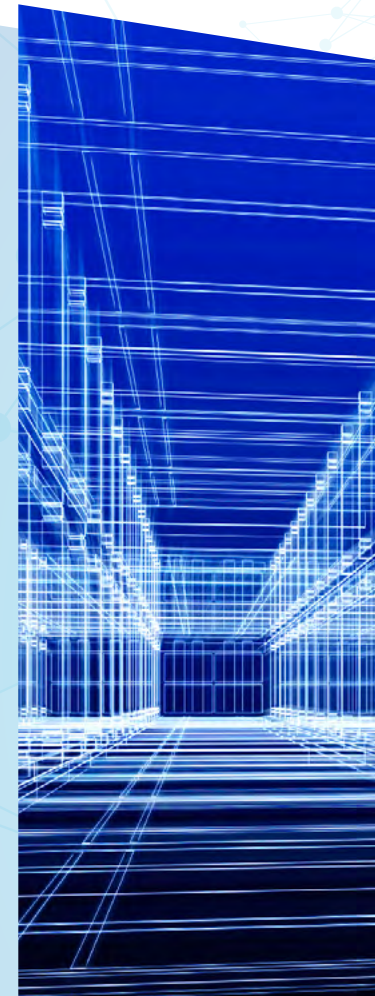
CHAPTER 4

Connecting to Your Customers Where They Are

A major part of a successful CEC, and becoming a customer company overall, is engaging with your customers anywhere they are (much of which is determined by their age/demographic). In this modern age, that includes supporting the customer whether they are using a mobile device, a web site, social media, a community forum, or a blog.

Keys to this approach include:
1. Visibility into the path the customer has taken.
2. The tools to solve a customer issue, even when in a remote location.
3. Maintaining context so customers don't have to repeat info as they move between channels.

Benefits of this approach include:
1. Anticipating customer pain points and reaching out to them before they have to contact you.
2. Catching customer issues elsewhere (besides standard emails and calls).
3. Providing a personalized one-to-one experience for customers.

The biggest payoff to connecting to where your customers are is making them happy by providing them the service they want and expect, the way they want it.

45% of companies offering web or mobile self-service reported an increase in site traffic and reduced phone inquiries.
- CRM Magazine

CHAPTER 5

Putting the Right People in Place

The fact of the matter is that it's hard to hire good people. This is especially true of hiring for contact center-type roles, where turnover can be high, as can job stress. It takes a special kind of person to succeed in this environment.

What you need for a successful CEC is to attract really smart people, retain them, and give them a rewarding work environment. In addition, look to hire individuals for your support team who genuinely care about helping people, and who've worked in service industries and roles in the past.

Here are several ways to do this:

- **Be specific about the role.** Don't hire someone whose talent is managing Twitter to answer the phone and vice versa.
- **Do a skill assessment up front.** In other words, make sure they can "swim" before you toss them in the "deep end." Including a "role play" as part of the interview can help determine this.
- **Offer a stellar training program.** Employees will have a smaller chance of getting screamed at if they are armed with the answers to customer questions. Make it easy for them to pull information (like from a CRM) so they can solve customer problems quickly and effectively.
- **Reward employees for great work.** When they prove they can in fact "swim" and "swim well" by offering great customer service, take the time recognize it.

81% of companies motivate employees to treat customers fairly and 65% provide effective tools and training to gain trust with their customers.

- Peppers and Rogers Group

CONCLUSION

Building a CEC for Your Business

The right customer engagement center is essential for succeeding in today's business landscape. Customers will stay loyal and recommend your company to others, ultimately increasing your bottom line.

When building a CEC for your business, remember to:

• Begin with the end in mind. Do you want to increase revenue? Up customer satisfaction? Create loyal customers?

• Define the ideal customer experience by providing their ideal communication channel and by fostering customer loyalty.

• Get the right technology infrastructure in place, including one that can connect to multiple back-end solutions.

• Go where customers are, whether they are using a mobile device, a website, social media, a community forum, or a blog.

• Put the right people in place. Match their skills with appropriate roles, give them the tools to succeed, and reward them for great work.

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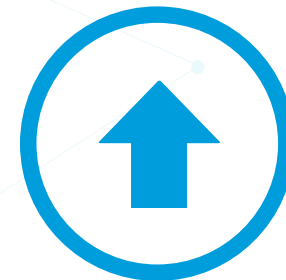
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