



Customer Experience Management

How Empathy is a Competitive Advantage

Austin Contact Center Alliance Symposium - 2018

Endeavor

About Us

Endeavor

**Industry Expertise. Research-Driven Insights.
Practical Strategies.**

Endeavor Management is a management consulting firm that leads clients to achieve real value from their strategic transformational initiatives.

We serve as a catalyst by providing the energy to maintain the dual perspective of running the business while changing the business through the application of key leadership principles and business strategy.

Endeavor's deep operational insight and broad industry experience enables our team to quickly understand the dynamics of client companies and markets.

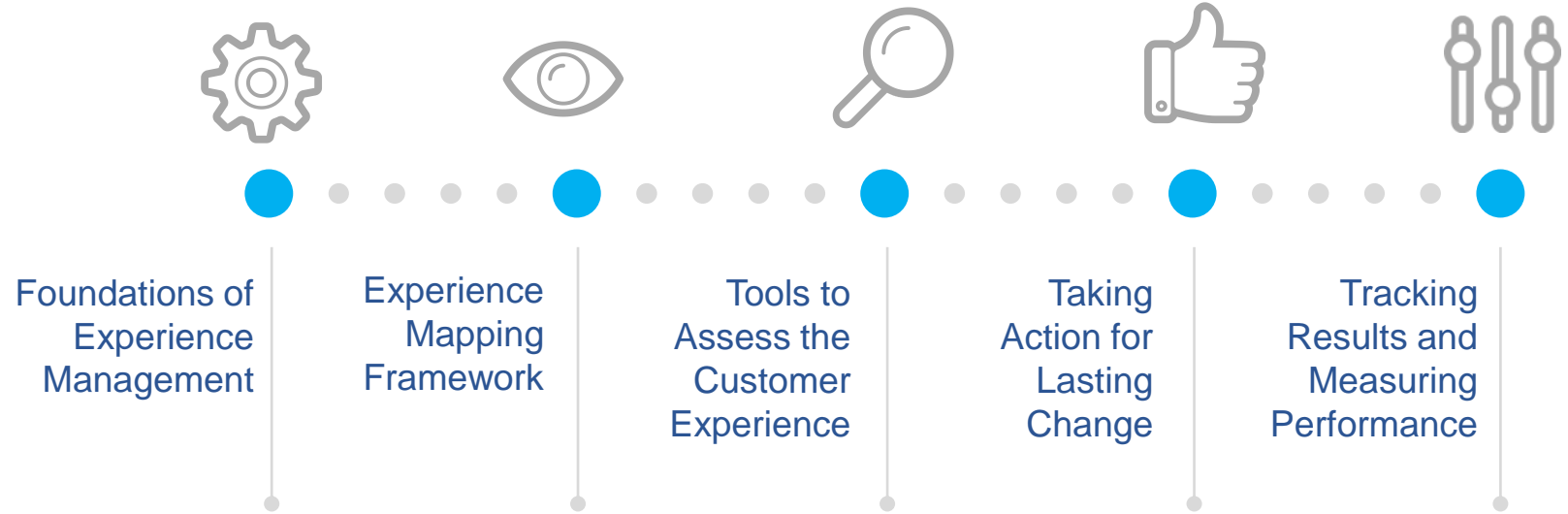
AGENDA

Our Time Together Today



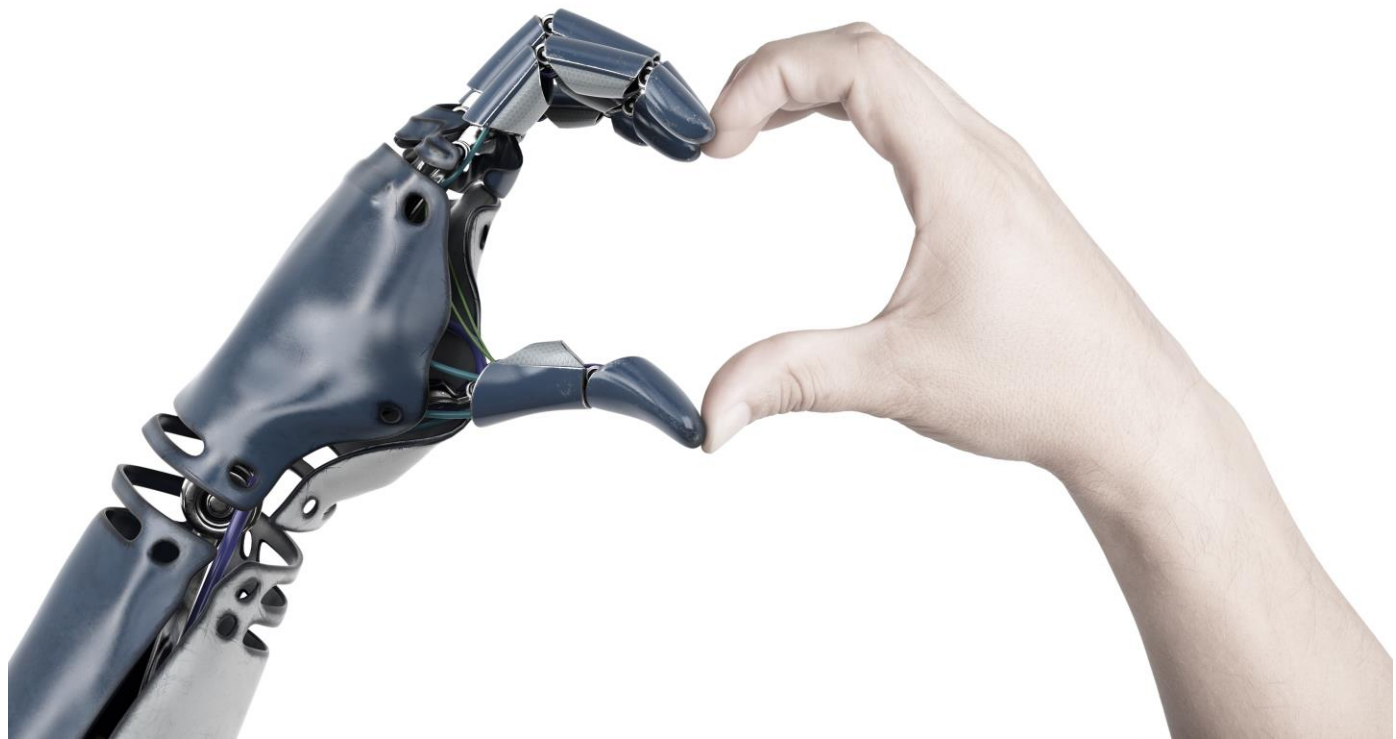
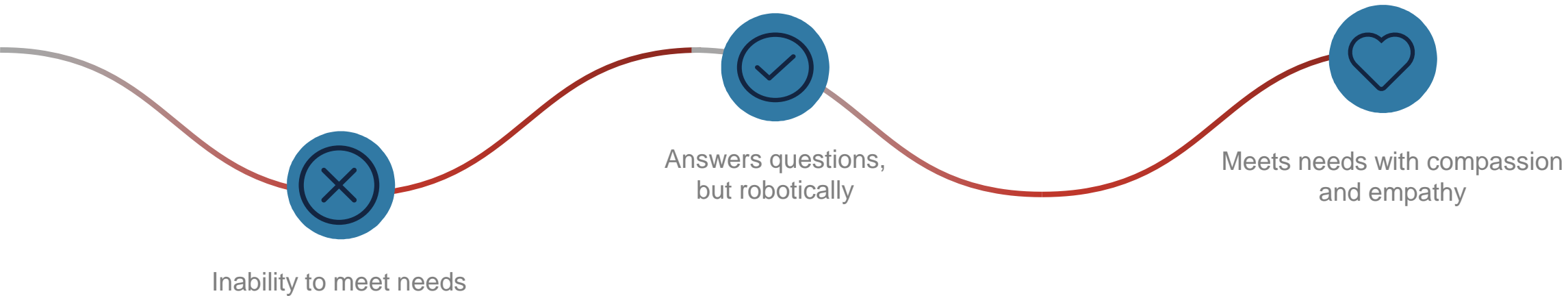
Today's Objective

To develop a common understanding of experience management and its role in contact centers.



FOUNDATIONS

Why Experience Management Matters





What It Means

Experience Management

- How your customers **perceive** their experience with the brand and your organization
- Includes the **entirety** of a customer's experience
- Influenced by **multiple** touchpoints and interactions
- Is shaped by the organizational **culture**
- Includes both **functional** and **emotional** needs



Why It Matters

Experience Management

- Today's consumers are more **savvy** and demanding
- Happy customers are **loyal** and **recommend** us to others
- Social media and other digital tools give customers a **loud voice** to share feedback with others
- When services and costs are similar, experience can provide a **competitive difference**
- The stories people tell to others about their experiences are often driven by emotion related to **what they value most**



New Thinking

CUSTOMERS AS SAVVY CONSUMERS

amazon



Uniqueness of Contact Centers

Experience Management

- The front door
- A critical “moment of trust”
- Common challenges of:
 - Ease of getting lost in the system – especially with a decentralized system
 - Many potential customers are never contacted after their initial call
 - First-time callers don’t yet have a point of contact – so have no where to turn if they can’t get what they need





Ideal Experience Elements

Providing a Customer-Focused Experience

- **One call does it all**
 - Requires Consolidation of needs and smooth transfer between departments
- **Representatives have the knowledge to answer questions and effectively meet needs**
 - Requires high product and service awareness, including robust training
- **Functional and emotional needs are validated and met**
 - Requires clear expectations of staff, including consistent guidelines and standards vs. a strict script

Facilitating an Ideal Experience

Enabling Tools and Practices

- **Productive physical space**
 - Invest in a comfortable, inspiring environment
- **Technological Tools for success**
 - Usage of CRM, call monitoring, digital lines
- **Metrics for measurement and tracking**
 - Measure customer satisfaction regularly using system that allows for real-time feedback and service recovery





Functional

I am confident in their products and services

I receive timely service

My technical requirements are met

My questions are answered

I can contact them with questions



Emotional

My needs are addressed

I am educated about the process

They make me look good to others

They care about me coming back next time

My time is respected

Where does your organization stand?

Evaluating Priority VOC Needs

How effectively has your organization...

- | | | |
|--|---|------------------------------|
| 1. Regularly listened to customers to determine their needs, perceptions and expectations? | 1 | Rocking it! |
| 2. Defined how customer expectations will be met or exceeded? | 2 | Sometimes/Partly |
| 3. Communicated the promise of the contact center to the rest of the organization and the marketplace? | 3 | Yikes...we need to fix this! |
| 4. Developed metrics to measure performance against the promise and assess performance? | | |

EXPERIENCE MAPPING

A Holistic Framework for Incorporating VOC



A Holistic Framework

Understanding the Customer Experience

A framework must:

Consider All Parts of the Experience

Break Down Siloed Thinking

Account for a Variety of Touchpoints

Facilitate Lasting Change

Our Framework: The Experience Map

Understanding the Customer Experience

Awareness



- Perceptions and awareness of products and brand
- Outreach activities
- Ideal relationship
- Previous experiences

Evaluation



- RFP process
- Evaluation and selection of a supplier
- Assessment of competitors
- Preparation for what to expect

Purchase



- Timing and ease of sales process
- Communication channels
- Understanding of options
- Coordination with suppliers

Delivery/Support



- Product tracking and delivery updates
- Delivery of value proposition
- Management of delays or problems
- Assistance with

Refer/Retain



- After sales services and support
- Retaining customers

Touchpoints Evaluated at each Stage



Engaging Customers Directly

Using Customer Input to Assess the Experience

Avoid Assumptions

Best Practices Exist, but Your Customers are Unique

Direct Voice of the Customer Evokes Empathy and Inspires Change

Assess What Matters Most



ASSESSMENT TOOLS

A Holistic Framework for Incorporating VOC

Picking the Right Assessment Tool

Tools to Assess the Experience



Observational



Co-Creation



Engagement



Monitoring

Lower
Cost

Shadowing/
Volunteering

Persona
Development

Ask customers
directly for their
feedback

Team Huddles

**Evaluation of
Call Recordings**

Story Boarding

Focus Groups

Comment Boards

**On-Site
Assessment**

Customer
Advisory Board

**Quantitative Client
Feedback Survey**

Social Media Monitoring

**Regularly Scheduled
Feedback Survey**

User Testing

Expert Panel

**In-Depth
Experience
Mapping Interviews**

**Real-Time Service
Recovery Dashboard**

Higher
Cost

Which can you best influence in your current role?

Assessment Dimensions

Delivering a World Class Contact Center Experience

Voice of the Customer

Process
Standardization

Change Leadership

Performance Management

Agent Tools

Agent Empowerment

Web Integration

Learning & Development

Business Reporting

Translating Learnings to Action

Tools to Assess the Experience

Include Insight for Each Stage

Incorporate Emotional and Functional Needs

Current Vs. Ideal – Where are the Breakdowns?

Verbatim Quotes, Stories, Data, Audio Clips

Evoking Empathy = Building Momentum for Change

Assessment & Treatment

Ideal Outcome

"I am confident the patient is receiving... know m..."

Discussion

- Triage
- EMS
- Level
- Coord

Key Touchpoint

PAGE 33

Formal support groups and activities are lacking - and the most frequently requested improvement

Regular interactions with Child Life specialists were set as an expectation; this often is the case and it was a lifesaver, she was a critical part of the process for my child and very knowledgeable

“There is a Proton Pals dinner once per week”

However, today, Child the Child L was looking

I know there for prostate heard of ar

Particularly activities (us to conn is almost n

However, t keep in tou

Touchpoint Summary: Resources for managing side effects, consistent updates to referrer are top needs

Referrers who request follow-up calls only receive these about half of the time.

EXPERIENCE SUMMARY

Challenges vary by segment, but interactions with providers are consistent satisfiers

NEED	SCHEDULING	FIRST VISIT/ASSESSMENT	TREATMENT	FOLLOW-UP
Brand strength and WOM recommendations from friends/family are high-performing decision facilitators. OB/MFM/IVF patients seek access to pediatric resources, and value care continuity within one system. GYN patients are driven by a recommended doctor, but the system is seen as an added benefit. However, older GYN patients are loyal to their doctor and minimally influenced by the affiliation.	Ease of scheduling varies by segment. MFM and RE/IVF generally work well. Some OBGYN patients report negative first impressions due to not receiving scheduling call-backs. New GYN patients are surprised at long waits for a first visit. Many are unable to choose a specific doctor due to lack of appointment availability. To relieve anxiety, there is a need for connection and expectation-setting ahead of first visit. Better preparation for parking and navigation are sought.	Interactions with provider are highly praised, as patients recall having all of their questions answered and confidence in next steps. In uncertain situations, especially RE/IVF and MFM, patients compliment thorough assessments and treatment planning.	Confidence in care and interactions with providers continue to be satisfiers. OBGYN patients experience the most inconveniences with long wait times and parking that adds up after numerous visits. Older GYN and post-menopausal patients suggest more resources and information tailored to their needs. Although care coordination works well within clinics, there can be a disconnect with other services or doctors in the system.	MyChart is a well-liked tool for on-going communication with providers, viewing test results, and managing future visits. However, the phone tree is tedious and patients want an easier way to call with questions or to discuss test results. All would recommend the Pavilion to others. However, those with complex needs or high risk pregnancies are the strongest advocates, believing that access to expertise is worth the inconveniences of navigating a large system.

High performance Moderate performance Low performance

www.endeavorrgmt.com/healthcare 14 Gell

Account for Segment Differences


Assessing Segment-Specific Needs

Not all customers are the same

Account for unique needs with personas or profiles

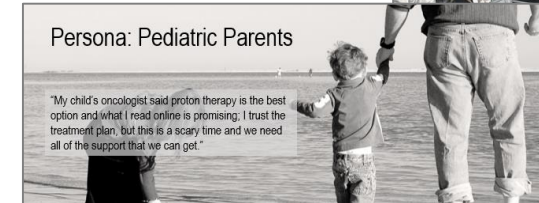
- What are their different motivators and needs?
- Evaluate current high and low-performing

Persona: Adult Patients



"I have heard and read promising things about proton therapy and highly trust the hospital. So arrive with high expectations – and am surprised at the ease of the process. I am grateful for my experience at the Proton Therapy Center and confident in my next steps."

Persona: Pediatric Parents



"My child's oncologist said proton therapy is the best option and what I read online is promising. I trust the treatment plan, but this is a scary time and we need all of the support that we can get."

DESCRIPTORs

- The majority find out about proton therapy by physicians; about half were patients at prior to the PTC
- High awareness of hospital due to living in the area, national rankings or advertisements
- Often traveling far from home stressed about finances and siblings
- Information seekers who conduct research, yet trust their physician


BEHAVIORs

- Research using hospital's website; read about their child's diagnosis and others' stories
- Obtain social support from other patients in the waiting room, often active in online support systems after treatment
- Look to Child Life specialist and staff for resources

NEEDs

- Tips for how to make the process as easy as possible
- Assistance planning travel and managing insurance
- Connection to other parents
- Activities to keep their child busy during stays in Houston
- An upfront understanding that side effects or C-PTX may be minimal

Local Referrers
Segment 1



Likelihood to Recommend

Not Likely	5%
Neutral/Not Sure	24%
Somewhat Likely	45%
Very Likely	28%

Top Referral Decision Factors

- 1 - Ease of access and scheduling
- 2 - Previous experience with a specific physician
- 3 - Ease of coordinating care after a referral

Referral Promoters

- Ease of access (transfers, scheduling, timing)
- Appropriate for complex cases unable to be treated locally
- Variety of satellite locations
- Current outreach efforts

Referral Detractors


- Fear of losing patient within the system
- Houston-area or other large hospitals are also close
- Specialty-specific hospitals often preferred
- Patients are anxious of size, travel to NOLA

Unique Needs

- Adherence to preferences for patient return/collaboration
- Highest need for easy access/scheduling
- Understanding of options at satellite locations

www.endosavimgmt.com/healthcare | 25 | Gelb

Regional Referrers
Segment 2



Likelihood to Recommend

Not Likely	0%
Neutral/Not Sure	5%
Somewhat Likely	21%
Very Likely	74%

Perception

Unfavorable	0%
Neutral	0%
Favorable	42%
Very Favorable	53%

Top Referral Decision Factors

- 1 - Ease of access and scheduling
- 2 - Previous experience with a specific physician
- 3 - Ease of coordinating care after a referral

Referral Promoters

- Ease of access (transfers, scheduling, timing)
- Appropriate for complex cases unable to be treated locally
- Variety of satellite locations
- Current outreach efforts

Referral Detractors

- Fear of losing patient within the system
- Houston-area or other large hospitals are also close
- Specialty-specific hospitals often preferred
- Patients are anxious of size, travel to NOLA

Unique Needs

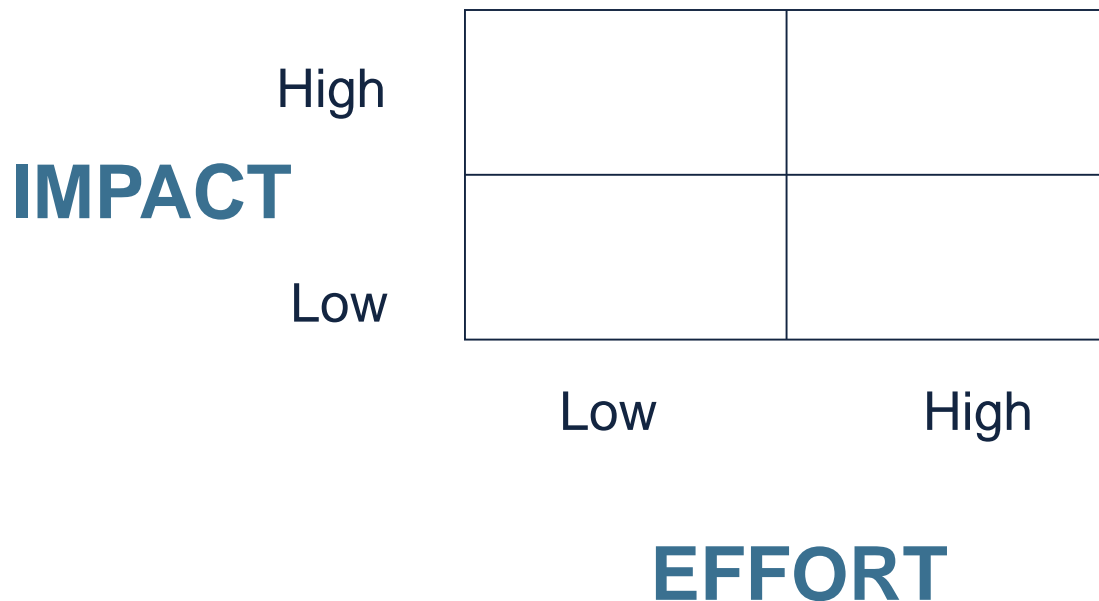
- Adherence to preferences for patient return/collaboration
- Highest need for easy access/scheduling
- Understanding of options at satellite locations

www.endosavimgmt.com/healthcare | 26 | Gelb

Action-Planning for Lasting Change

Tools for Taking Action to Improve the Customer Experience

Prioritizing based on level of importance, alignment with objective, and impact vs. effort →



Workshops and planning for change

- Cross-functional experience workshops to build empathy and give staff a voice; allows them to agree on expected behaviors and develop personal action plans.
- Contact center design planning among leadership to design (or re-design) priority processes, metrics, training, and implementation
- Process design, with a deep-dive focus on an individual process, that details each step and skill required

Examples – VOC Spheres of Action

Taking Action to Improve the Customer Experience



Promoting a consistent experience through process standardization



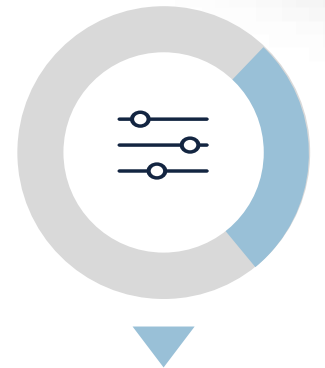
Empowerment of agents to make informed decisions and resolve problems



Agent learner development and training for understanding complex operations



Making it easier for customer to connect, including omnichannel experiences and web integration



Implementing a robust dashboard system to regularly seek feedback and take action on the results

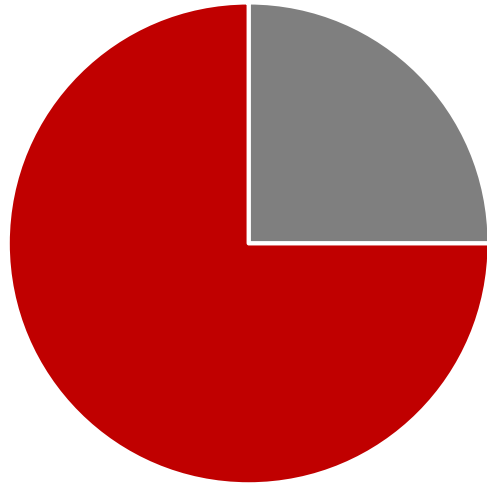
Case Study - Healthcare

Contact Centers in Healthcare



Healthcare challenges:

- 75% of potential patients who abandon calls do not call back*
- Reducing the abandonment rate from 5% to 10% represents an estimated \$1.8 million revenue*



Endeavor Case Study:

A large hospital was receiving 9,000 calls and emails per month, but only 58% resulted in new admissions

Case Study - Healthcare

Contact Centers in Healthcare

What We Did:

- Experience Mapping to understand reasons for abandonment
- Staff interviews to assess facilitators and barriers
- Site Audit to evaluate current processes

The Changes:

- Action-planning included:
 - Empowering call center teams to help them solve problem
 - Standardizing conversation points around common challenge
 - Better documenting information from each contact and transitioning them to the relevant service area
 - Implementing a dashboard to track those who did not make appointment and elevate for service recovery if needed

The Outcome:

In the year following, over 1,000 interventions were completed, with a 43% conversation rate – and a total of over 27,000,000 in captured revenue



FACILITATING LASTING CHANGE

Measuring and Monitoring Performance

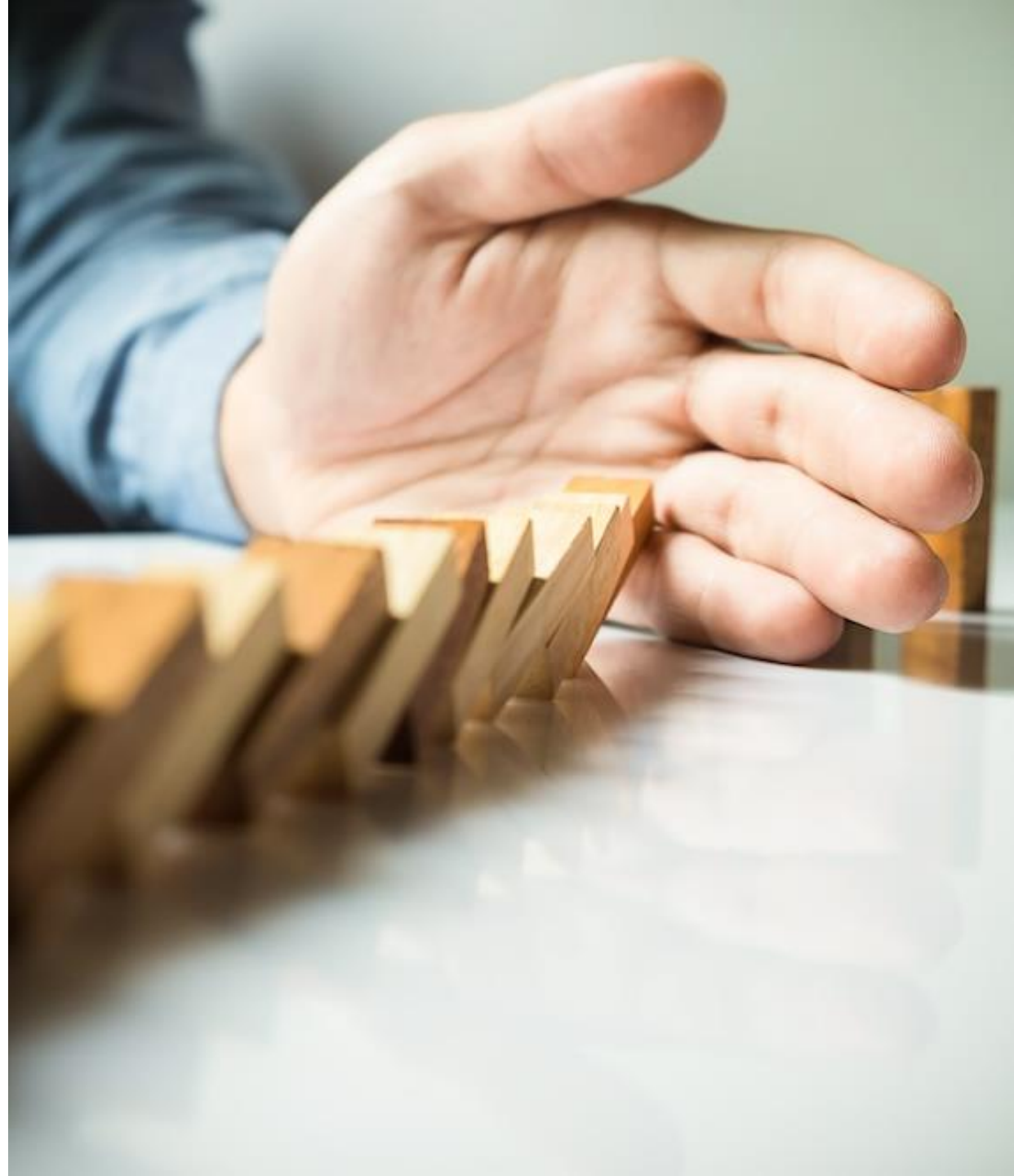
Monitor for Real Time Response

Lasting Change and Impact

Keep an eye on the right targets and metrics

Stop a negative trend before it snowballs

Identify and build on positive outcomes



Data Visualization Tools - Dashboards

Dashboards Drive Better Decisions



Listen Closer

Capture the Voice of the Customer across multiple touchpoints at the time of interaction, not when it's "survey month."



Analyze Faster

Integrate data collected inside the organization with data gathered through discovery tools in a single platform. Compare data in real-time and dive into what's causing changes.



Socialize Insights Better

Develop key workflows and reports to share for decision making – both strategically and in-real-time for service recovery.

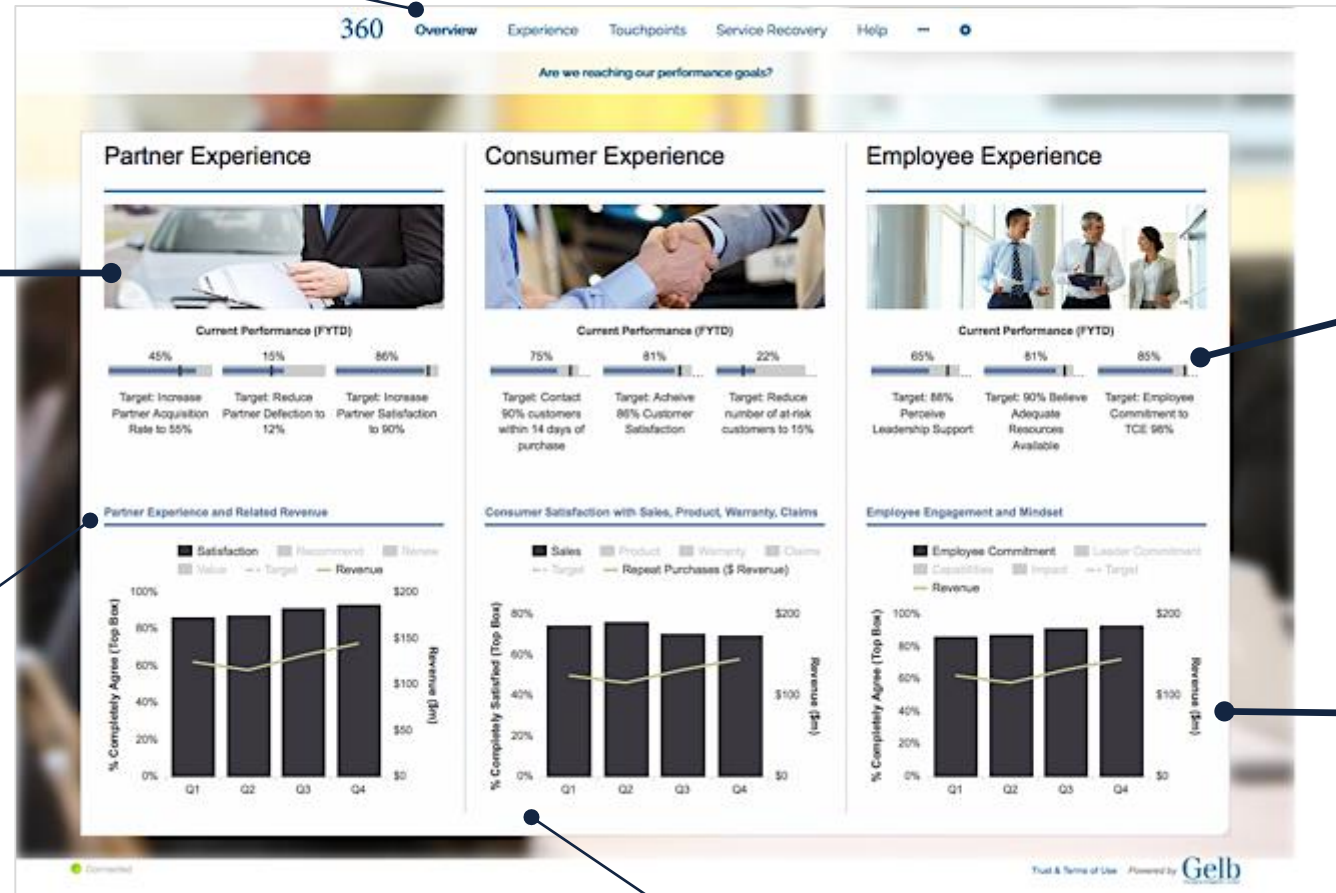
Data Visualization - Focus

Business Intelligence from a bird's eye view

XM Program performance to goals

KPIs

Experience metrics from multiple perspectives: Partners, Customers, Employees



Current performance versus targets

KRIs

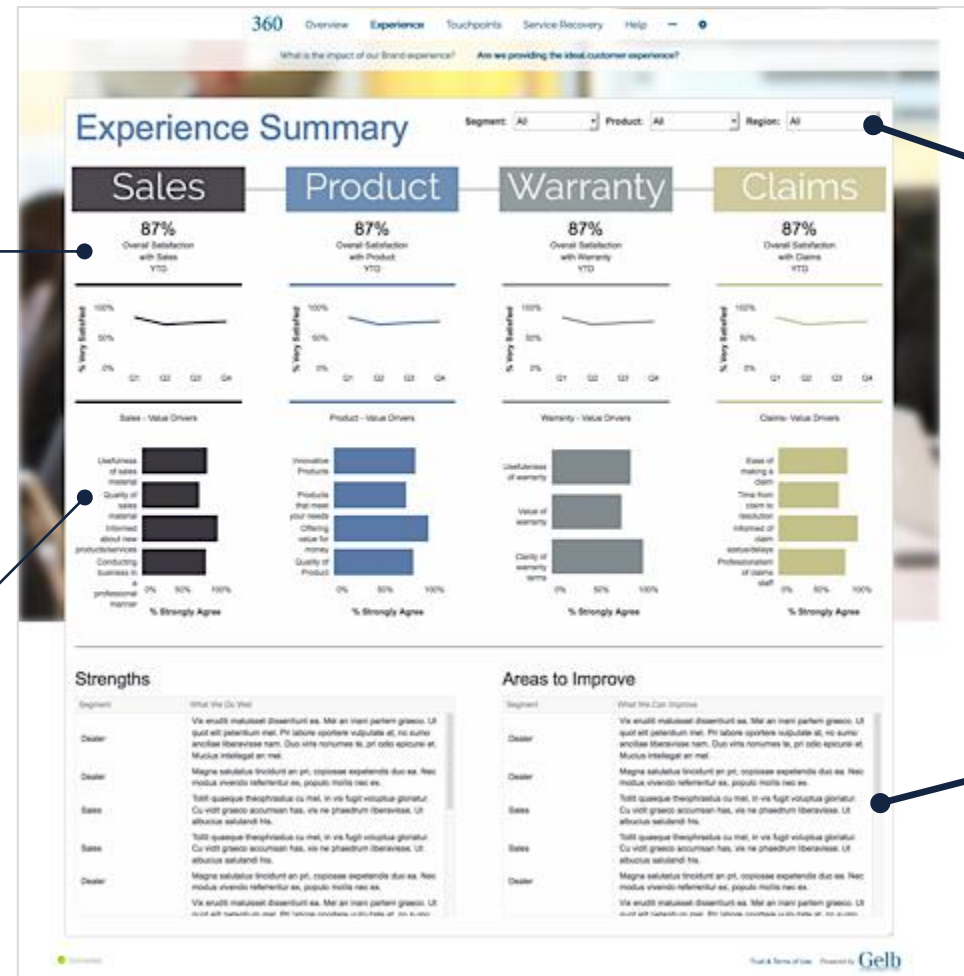
Satisfaction trended with financial measures

Data Visualization – Drill Down

Business intelligence by customer stage or other focus area

Satisfaction by experience stage to identify customer pain points

Track performance on drivers of value



Filter by segment, product and region to identify potential inconsistencies across the experience

Voice of the customer for deeper understanding

Lastly- Thing Long-Term; Make it Stick!

Lasting Change and Impact

Keep the journey map at top of mind –
make it visible and include it in decisions

Staff must OWN the experience

Tie in operations – scripting or marketing
can't fix a broken process

Set goals. Measure change and progress
(monitoring surveys, dashboards, etc.)



Endeavor THANK YOU

We look forward to working with you

Contact



www.endeavormgmt.com/oil-and-gas



950 Echo Lane, Suite 200, Houston, TX 77024



@EndeavorMgmt



800-846-4051



info@endeavormgmt.com



www.linkedin.com/endeavormgmt