Customer Experience Management

How Empathy is a Competitive Advantage

Austin Contact Center Alliance Symposium - 2018

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About Us

Endeavor

Industry Expertise. Research-Driven Insights. Practical Strategies.

Capital Project Effectiveness
Change Management
Digital Insights & Dashboards
Cultural Transformation
Leadership Development and Executive Coaching
Market & Customer Insight
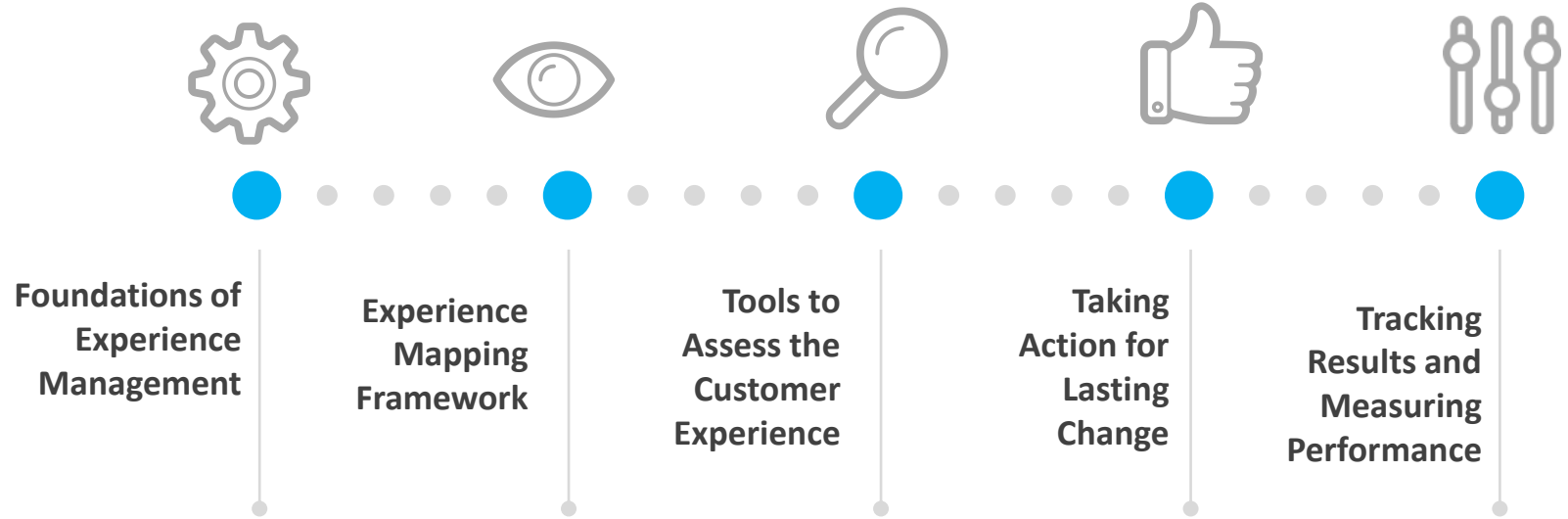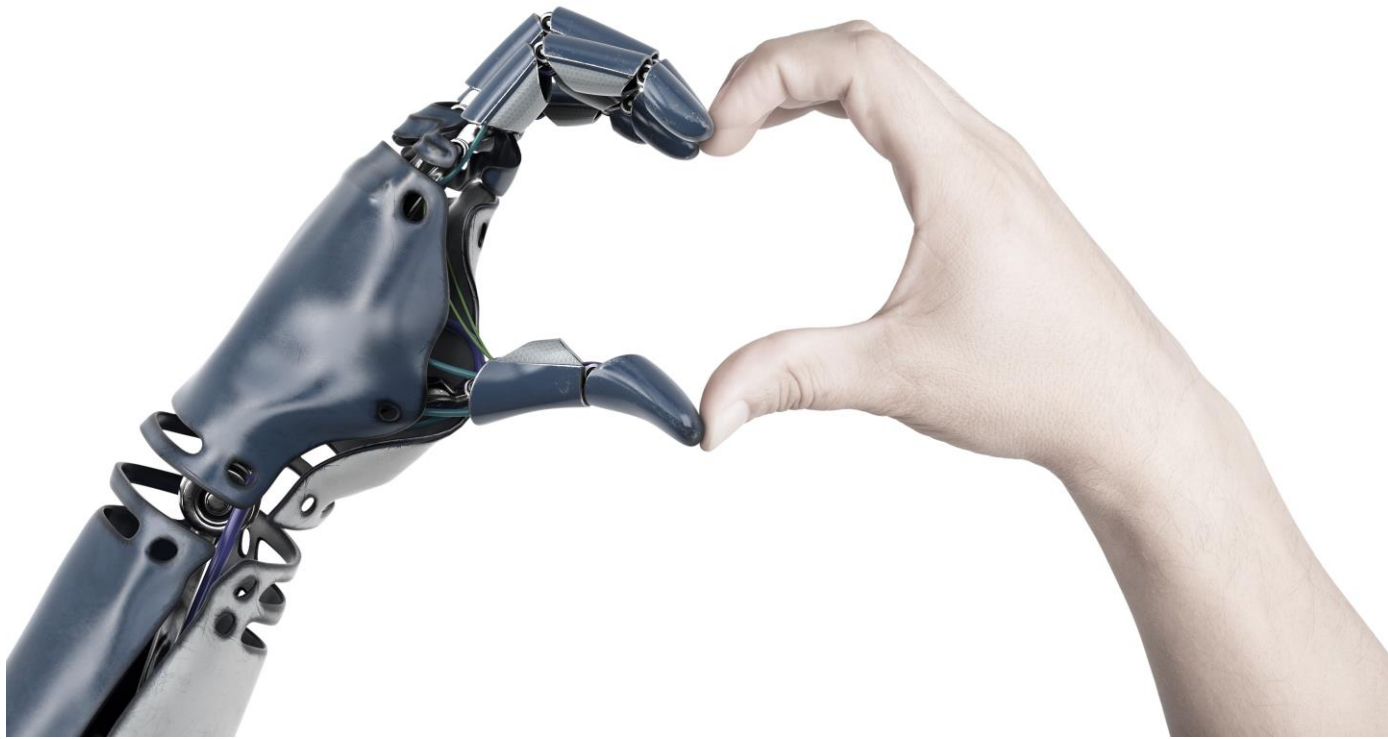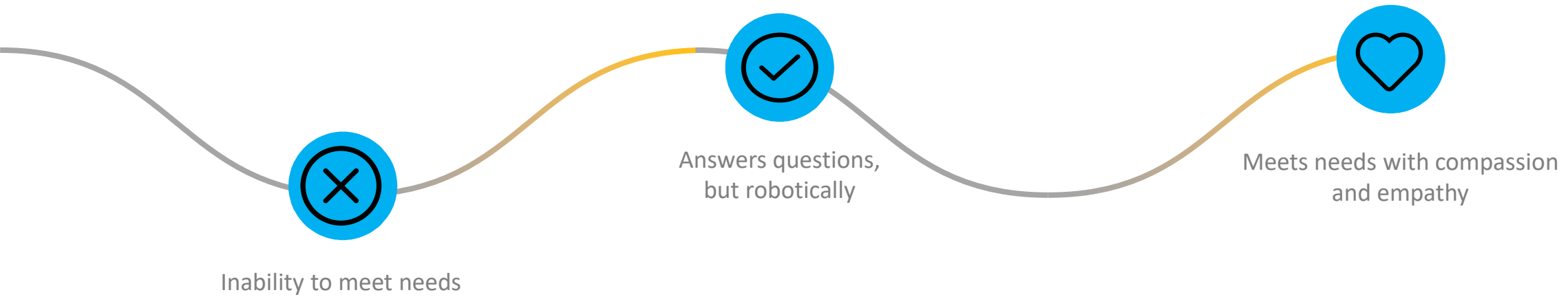Strategy Development and Implementation

AGENDA

Our Time Together Today

Today's Objective

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

Foundations of Experience Management

Experience Mapping Framework

Tools to Assess the Customer Experience

Taking Action for Lasting Change

Tracking Results and Measuring Performance

Inability to meet needs

Answers questions,
but robotically

Meets needs with compassion
and empathy

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Foundations

Experience Management

What is 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

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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 make customer feedback **easily accessible** to 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 my emotion related to **what they value most**

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Uniqueness of Contact Centers

Experience Management

- Contact centers are the front door and serve as a critical "moment of trust"

- Common challenges include:

  - 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

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LEADING PRACTICES
FOR CALL CENTERS

1. One call does it all – Consolidation of needs and smooth transfer

2. High product and service awareness – Robust knowledge and training

3. Clear expectations of staff – Consistent guidelines vs. a strict script

4. Productive physical space – Invest in a comfortable, inspiring environment

5. Technological Tools for success – CRM, call monitoring, digital lines

6. Metrics matter – Measure satisfaction, real-time feedback ands recovery

A FRAMEWORK
FOR HOLISTIC UNDERSTANDING

A framework must:

Consider All Parts of their Experience

Break Down Siloed Thinking

Account for a Variety of Touchpoints

Facilitate Lasting Change

UNDERSTAND CUSTOMER NEEDS THROUGH AN EXPERIENCE MAP

Awareness	Evaluation	Purchase	Delivery/Support	Refer/Retain
• Perceptions and awareness of products and brand • Outreach activities • Ideal relationship • Previous experiences	• RFP process • Evaluation and selection of a supplier • Assessment of competitors • Preparation for what to expect	• Timing and ease of sales process • Communication channels • Understanding of options • Coordination with suppliers	• Product tracking and delivery updates • Delivery of value proposition • Management of delays or problems • Assistance with	• After sales services and support • Retaining customers

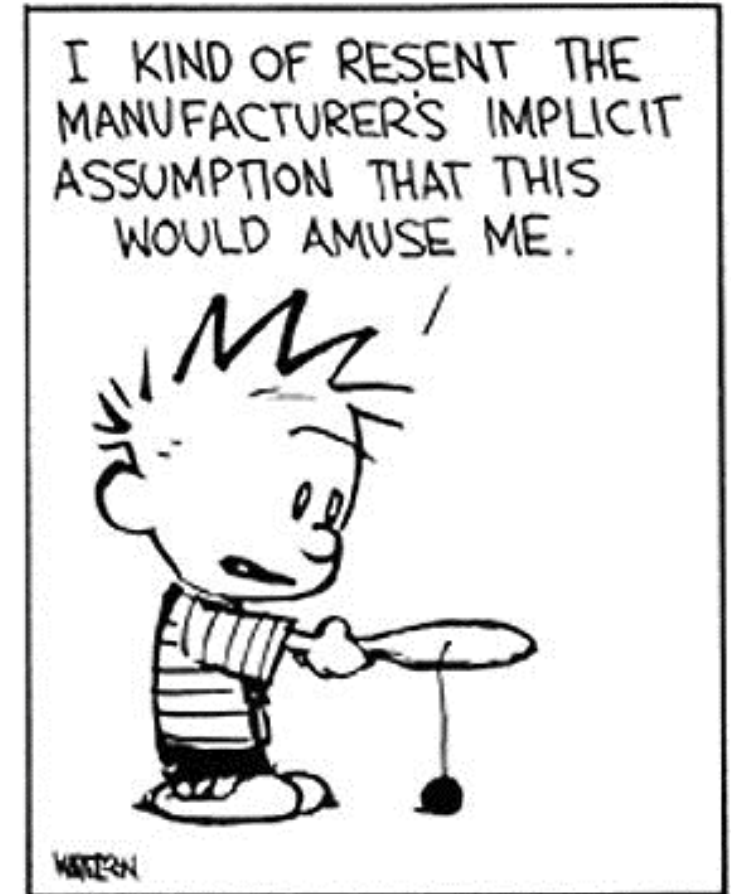## Touchpoints Evaluated at each Stage

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ENGAGING CUSTOMERS
WITH DIRECT INPUT

Avoid Assumptions

Best Practices Exist, but Your Customers are Unique

Direct Voice of the Customer Evokes Empathy and Inspires Change

Assess What Matters Most

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Pick the Right Tool

Observational

Co-Creation

Engagement

Monitoring

Lower Cost

Higher Cost

Observational	Co-Creation	Engagement	Monitoring
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
User Testing	Expert Panel	**In-Depth Experience Mapping Interviews**	**Regularly Scheduled Feedback Survey**
			Real-Time Service Recovery Dashbhoard

Which can you best influence in your current role?

Functional

I am confident in their products and services

Services is timely

My technical requirements are met

My questions are answered

I can contact them with questions

Emotional

My needs are addressed
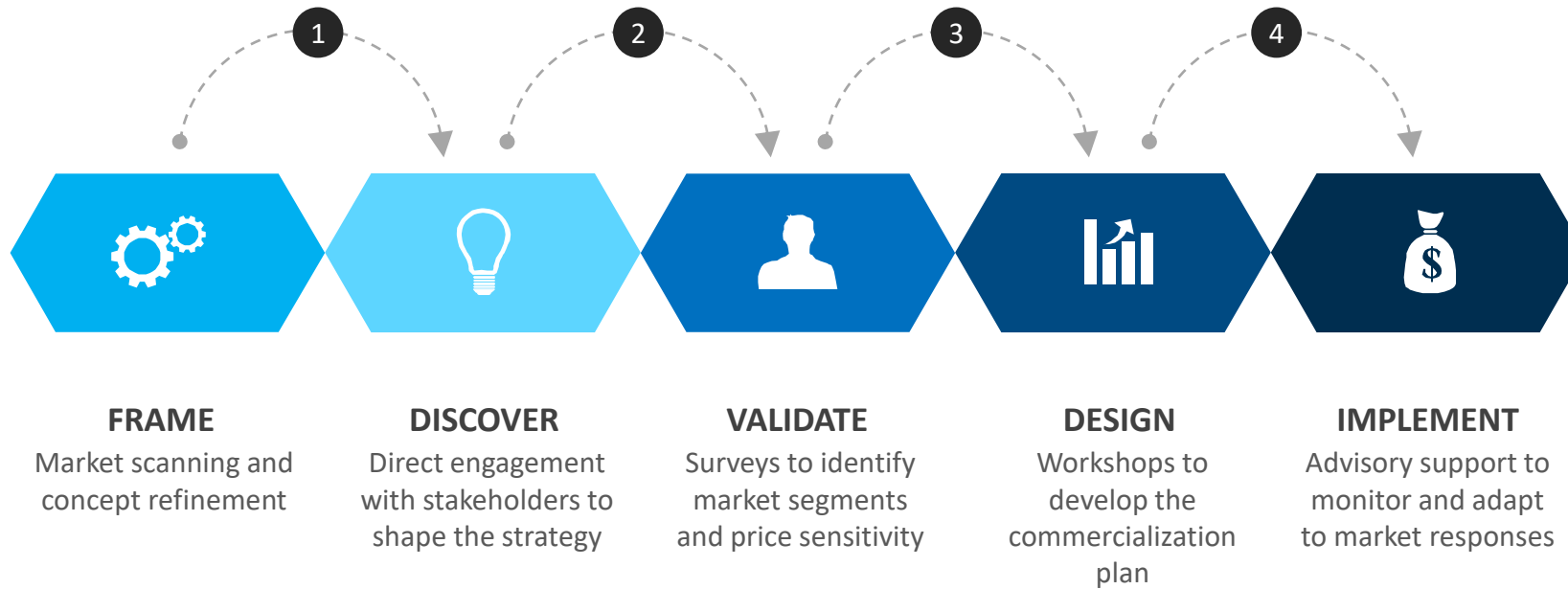
I am educated about the process

They make me look good to others

They care about me coming back next time

My time is respected

OUR PROCESS

Steps Toward Your Goal

1 **2** **3** **4**

FRAME

Market scanning and concept refinement

DISCOVER

Direct engagement with stakeholders to shape the strategy

VALIDATE

Surveys to identify market segments and price sensitivity

DESIGN

Workshops to develop the commercialization plan

IMPLEMENT

Advisory support to monitor and adapt to market responses

TRANSLATE INFORMATION TO ACTION

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

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Action Planning Tools

- Cross-functional experience workshops to build empathy give staff a voice and input into changes

- Site audit to focus on challenges identified by customers – where are the breakdowns happening?

- Contact center design planning to design processes, metrics, training, and implementation

- Process design, with a focus on an individual process, that details each step and skill required

IMPACT

High

Low

EFFORT

Low   High

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COMMON EXAMPLES
OF CONTACT CENTER IMPROVEMENT AREAS

Increase consistency through process improvement and standardization
While simultaneously

Empowering agents to make informed decisions and resolve problems

Provide more learner development for understanding complex operations

Proactively prepare for crisis management, new skills that need to be learned, and setting experience standards

Build an omni-channel experience through adding web integration

HEALTHCARE CONTACT CENTER
UNIQUE CHALLENGES
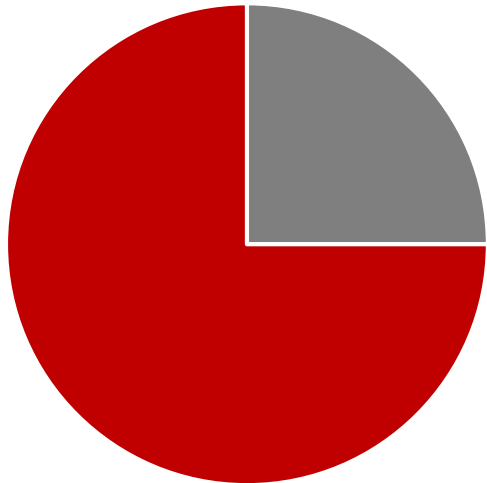
75% of potential patients who abandon calls do not call back*

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

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 problems
    - Standardizing conversation points around common challenges
    - Better documenting information from each contact and transitioning them to the relevant service area
    - Implementing a dashboard to track those who did not make an 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

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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."

DESCRIPTORS
- About half have previous treatments or surgeries prior to arrival at the PTC
- Low awareness of The Proton Therapy Center due to living in the area, national rankings or advertisements
- Often traveling far from home
- Information seekers who conduct thorough research

BEHAVIORS
- Seek proton therapy because of an oncologist's recommendation, what they hear from others, and online research
- Research using hospital's website; seek diagnosis-specific information
- Obtain social support from other patients in the waiting room
- Become "friends" with the technicians and staff

NEEDS
- Preparation for what to expect during the simulation and insurance process (before first visit)
- Options for activities and support (especially those from out of town)
- A process for better managing machine breakdowns
- A way to coordinate multiple appointments for return visits (especially those from out of town)

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 are likely but much less severe than normal

ASSESS
WHERE YOUR ORGANIZATION STANDS

How effectively has your organization…

❑ Regularly listened to customers and internal stakeholders to determine their needs, perceptions and expectations?

❑ Defined how customer expectations will be met or exceeded?

❑ Communicated the promise of the contact center to the rest of the organization and the marketplace?

❑ Developed metrics to measure performance against the promise and assess performance?

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MAKING IT STICK
LONG-TERM SUCCESS

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

Care teams 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.)

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Endeavor THANK YOU

We look forward to working with you

Contact

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