How To Achieve A 360-Degree Customer View

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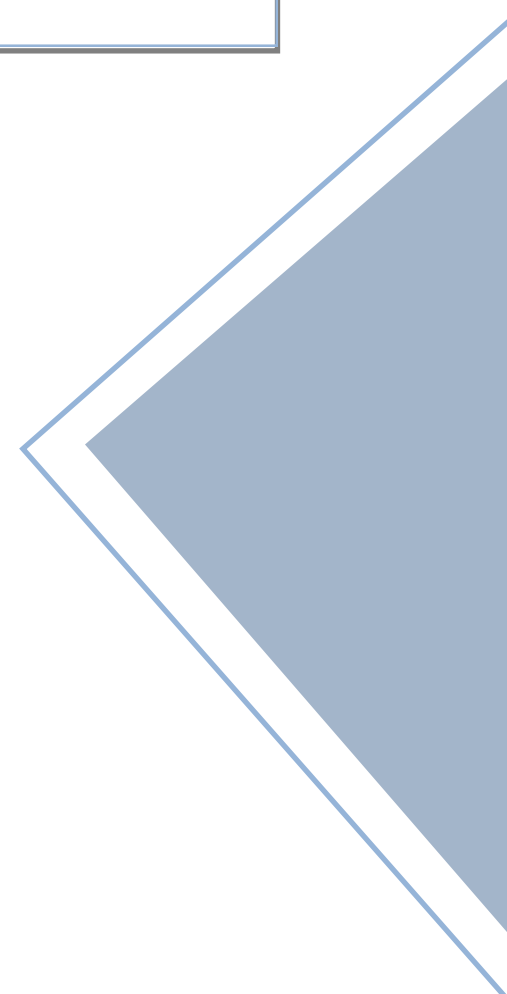
CEO

Kustomer

Shep Hyken

WSJ and NYT bestselling author and
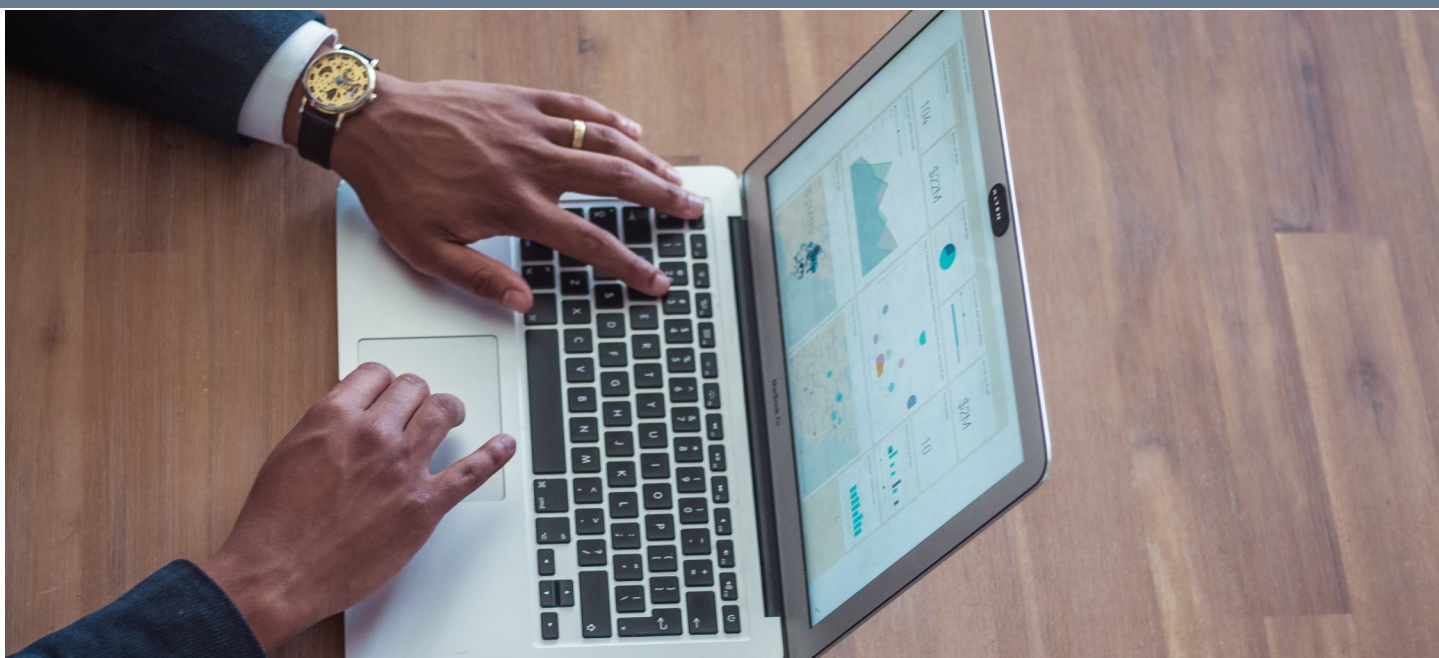#1 customer experience and customer service influencer

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When it comes to the most urgent challenges, none affects more contact centers and customer service departments than convoluted systems. According to CCW Digital research, two of the top five areas for improvement include agents spending too much time on low-value work (32%) and the absence of a 360-degree view (32% as well).

When customer service agents have the right technologies and systems in place to achieve a 360-degree view of the consumer, they are able to deliver exceptional customer support. However, when they don't, customer service agents spend excess time navigating applications and data bases trying to manually find customers' information and history, which is frustrating and inefficient for both employee and customer. This is especially common across customer service channels.

Read on to learn the five steps to achieving a 360-degree customer view.

Step 1: Combine digital and human support to communicate consistently across all channels

"The adoption or adaption of existing technologies, depending upon how you look at it, was thrown three to five years in the future.. *We would have gotten around to a lot of what we're using now that we didn't use much of before, at the level we're using now, but it might not have been for another few years - so we're moving at high speed.*"

- WSJ and NYT bestselling author, Shep Hyken

Unfortunately, many companies are still relying on the old model of customer service, where they treat each new interaction as a separate event handled by different people across a variety of siloed platforms. In this model, there's no way to store, share and track the customer's history and past conversations, so customers are forced to repeat their issue to each new service agent.

This may be an okay strategy if inquiries were completely handled through automated self-service, but unfortunately for many, this is not the case.

According to CCW Digital research, a staggering 65% of companies say very few (if any) of their interactions are resolved without agent assistance (i.e. live chat or live SMS, emerging video meetings, phone support, etc). For example, if a contact center or customer service department does not have an *intelligent* chatbot that is able to capture and aggregate actionable customer data, escalation is almost always needed which decreases productivity.

73% of companies say their digital interactions frequently, if not always, escalate to a traditional phone agent. Human support has never been more important, as the vast majority of customer service inquiries end up being transferred to a human if they are not already.

Upwards of 80% of companies say their agents frequently have to access multiple systems when supporting customers. The majority of companies do not provide agents with sufficient context when escalating from self-service channels. The absence of 360-degree views and intuitive knowledge bases further increase the difficulty - and delay - of providing personalized, relevant engagement.

> "Repetition comes at a price. According to a recent Kustomer survey 86% of consumers get frustrated when they have to repeat information to customer service agents. Fortunately, the fix is simple: a platform that can collect, organize and streamline customer data so it's all in one place." - Kustomer, CEO, Brad Birnbaum

To deliver an exceptional experience, you have to know the customer—and that requires data. A platform that brings all the data about a customer into one place helps customer service agents understand the context of a customer's conversations and helps them deliver more efficient, proactive and relevant service. There's no need to waste the customer's or agent's time by asking for repeat information, or switching between systems. Instead, that information is available at the click of a button, allowing the agent to personalize the customer's experience by giving fine-tuned advice, addressing problems proactively, and suggesting other products or services the customer might enjoy. The result? An efficient but personal interaction that builds a lifelong customer relationship.

Step 2: Acknowledge the need for a centralized CRM

Building a 360-degree customer view is dependent upon giving our front-line employees and customer service agents the tools they need to see customer history, route inquiries accordingly, and find solutions seamlessly through an efficient customer relationship management platform.

As seen in a recent CCW Digital webinar, during a peak in the pandemic, customer contact volume increased ten fold, while agent capacity decreased 20%, call duration increased 62%, wait times increased by 27 minutes, and as you would guess, customer satisfaction decreased - roughly 28%.

As customer volume increases and agent capacity decreases, friction is brought into the customer experience, exposing an unforgiving area for improvement in the contact center – the vast majority of CRMs being used are not getting the job done. Simply put, customer service departments around the globe are losing customers as a result of poor management and tech-nology.

Specifically, inconsistent/incomplete access to customer data = longer wait times, less ability to predict needs, less ability to personalize interactions, and so much more.

We've seen an uptick in digital channel utilization, which means you have more touch points and data sources to aggregate customer history, and therefore the greater need for an omnichannel CRM.

The only way to alleviate the friction in the customer experience is to create a more efficient process, reducing the amount of applications agents need to record and access the customer history involved in a 360-degree customer view, and resolve problems by using a single unified desktop.

Step 3: Increase efficiency and personalization through AI and ML

AI can help you better glean insights from data at scale. Then it can be used to improve routing and/or provide agents with real-time guidance and recommendations, thereby increasing their ability to "see" and "use" their 360-degree view

AI and machine learning (ML) have the ability to improve the precision and speed of service by automating repetitive, manual tasks as well as your most complex business processes. For instance, high-volume conversation traffic could be intelligently routed to the most appropriate agent, loyal customers could be prioritized, and agents can quickly deliver standardized responses via dynamic content (when appropriate).

With Robotic Process Automation (RPA), AI can simulate human actions to complete repetitive and rule-based tasks and processes. RPA can allow chatbots to fully complete a customer conversation without the need to escalate to a human agent, as well as provide the customer with more self-service opportunities by tapping into appropriate backend data. This makes agents more efficient, freeing up their time for complex and proactive support, and gives customers more accurate information more quickly.

> For example, chatbots are growing in popularity with both businesses and consumers. They can be used to collect initial information, provide responses to simple questions, and even complete standard tasks like initiating a return or answering an order status question. While there is always fear of losing personalization when using AI, ML, or automation in general, with the right platform, businesses can actually do the opposite.

If a business leverages customer data properly, chatbots could ask personalized questions based on an individual's purchase or browsing history. These interventions save time for both the customer and agent, and increase the time spent on the actual issue rather than information gathering and low-level support. Of course, if needed, once the customer experience requires a transfer to an agent, which it more times than not does, automation can route the customer to the right agent best equipped to solved the problem through a 360-degree customer view and deliver a frictionless customer experience.

Step 4: Improve agent efficiency with a first line of defense

Look for a platform that leverages chatbots and AI-enabled deflection to act as a first line of defense, optimizing a customer's ability to self-serve so agents can focus on the most important cases and deliver the highest impact. Your solution should have rules and workflow engines that eliminate repetitive tasks and trigger actions, providing your team much needed time and information to resolve difficult conversations quickly. By eliminating manual guesswork and deflecting easy inquiries, the right customer service platform should optimize support volume and empower agents with the tools and insights that drive results.

Legacy CRMs were built to manage cases, not customers. Siloed third-party data means an abundance of wasted time, with agents having to look in a multitude of different systems, on different platforms, just to service a single customer inquiry. Look for a platform that is designed to connect seamlessly with your other data sources and business intelligence tools, while taking the place of your support platform, contact center routing software, and process management solution.
Kustomer, CEO, Brad Birnbaum

You should be able to use the apps you already have and to integrate those in a usable way. When integrated properly, you should be able to do powerful things with your data, like segment customers, trigger actions, automate messages and power AI.
Kustomer, CEO, Brad Birnbaum

As low level, repetitive tasks become the job of AI and not agents, the role of agents will begin to transform. Support will likely turn into an escalation channel as technology continues to develop. That means agents will spend less time responding to inquiries and answering simple questions, and more time tackling complex or difficult problems. This may affect the type of agent that organizations hire. Finding the right technology to help agents solve difficult problems with the least amount of friction will be essential.

Customer service agents of the future will likely spend more time building brand equity and customer relationships. It will become the customer service agent's job to reflect the company's mission and values, and act as a trusted partner for customers. The changing expectations of consumers means that customers want to do business with companies they believe in, feeling as though they are a part of the brand. Customer service agents can help do just that, through both proactive and reactive support with a 360-degree view.

Customer service teams will also have more time to dive into customer data and feedback, not only to plan for peak shopping periods and busy channels, but also to inform product and service decisions. The most successful brands take customer insights and feedback to heart, and optimize their business in real time. As customer service organizations spend less time on low level inquiries, they can spend more time affecting the future of the business with valuable insights. As our world becomes increasingly more digital, one-to-one interactions with customers become more rare. Make the most of those moments.

Give your customers the freedom and flexibility to reach out anywhere, anytime, on any channel. With contextualized views of every customer in one screen or desktop, your team can deliver efficient and personalized service with a 360-degree view.

Step 5: Identifying the right functions before choosing a solution provider

> "Whenever you're in a crisis mode, in this particular case it's been the pandemic and COVID-19, the personality of a company becomes magnified" - WSJ and NYT bestselling author, Shep Hyken

The customer service solution provider market is surging right now, and for good reason. With contact centers continuing to struggle, customer engagement and management platforms must alleviate the challenges, as teams are put under a microscope. While this is a saturated market as many businesses continue to struggle to find a 360-degree customer view, it's important to identify some of the most important functionalities that a successful customer service solution provider can offer a customer service department. The most advanced customer service platforms provide the following benefits:

Allowing agents to customize searches & views: Enable agents to search, view, and segment individual customers based on any internal or external data, so they can better manage their time and queue.

Pre-defining shortcuts: Speed up your team of agents by providing pre-defined blocks of text that can be used when responding to customers during the most common conversations and inquiries.

The ability to collaborate: Invite another agent or someone else in the company to join a conversation. With features like Notes, Following, and @Mentions your team can work together to ensure customers get the service they expect.

Capitalizing on your knowledge base: Make customer self-service easy by delivering compelling articles and tutorials with rich media support including video, images, PDFs and more.

Recording customer sentiment/intent: Track your customers' sentiment to help agents decide how to best prioritize and engage in conversations and provide management a critical metric for overall \customer service effectiveness.

Keeping a pulse on the team: See what agents are working on in real time, and quickly jump to the customers and searches that agents are viewing. Access a live dashboard that helps to manage your effectiveness by including agent status, available capacity, and queue assignment.

About the Author
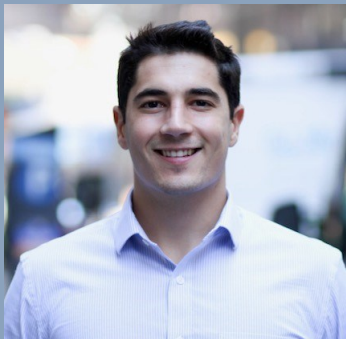
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Matt Wujciak is a digital writer, analyst, and marketer for CCW Digital, the #1 global online community and research hub for customer contact and customer experience professionals. Matt's work has been featured by a number of different publications and NYT and WSJ bestselling authors, Forbes coaches and contributors, and C-level executives from fortune 500 companies.

In his role, Matt interviews bestselling business authors and executives from brands such as Nike, Dow Jones (WSJ), Microsoft, Apple, Verizon, Adidas, Under Armour, Lyft, IBM, Salesforce and more. He is known in the CX media world for his industry-leading research and reports, articles and case studies on CX, consumer behavior, UI/UX, digital marketing, performance optimization, customer service, and brand strategy. He also speaks at live events and produces podcasts, webinars, and online events for CCW Digital and associated client brands.

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How to Choose a WFM Provider	April 14, 2020
How to Create an Omnichannel Contact Center	July 14, 2020
How to Achieve a 360-Degree Customer View	August 11, 2020
How to Choose a WFM Provider	September 15 2020

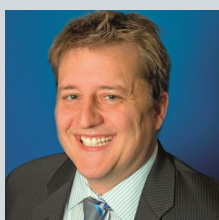**Interested in being a part of a How-To-Guide? Contact Us**

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