

Customer Insights and Analytics

WRITTEN BY: BRIAN CANTOR

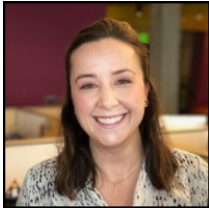


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Featuring Insights From:



Martha Walchuk

Senior Director of Product Marketing

Salesforce



Aransas Savas

Senior Director of Service Design & Studio Experience

WW (formerly Weight Watchers International)



Manny Marrero

Director of Operations

Getaroom



You will not find a single customer contact leader who disputes the importance of data. You will doubtfully find many who dispute the importance of “actionable analytics.”

Unfortunately, you will only find a handful who have mastered the customer intelligence process. Some possess the wrong view of actionable intelligence. Others do not consider the full gamut of insights (and opportunities) that exist in the omnichannel world.

Most do not make customer intelligence the *true centerpiece of their people, process and technology initiatives.*

This special report is aimed at that majority. It underscores why actionable intelligence is so important in today’s climate, why so many are going wrong with their data strategies, and examples of how best-in-class organizations are making actionable intelligence a reality.

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Why data is more relevant than ever

The case for actionable customer intelligence is rather simple: as the stakes of the customer experience rise, so too does the importance of data-driven decision-making. Customer preferences are more specific and demanding than ever before, which means there is no room to guess, let alone ignore, customer feedback, behavior, sentiment and intent.

More importantly, there is no opportunity for agents to waste time collecting and leveraging the information they need.

Here are some specific trends that underscore the unprecedented importance of data.

Customer centricity is an organizational priority

Not all organizations adopt the same customer contact strategies. All, however, agree that customer centricity is a paramount business concern.

They understand the importance of connecting with customers. More importantly, they understand the importance of uniting the entire organization around the principle of customer centricity. Every investment, decision and action should serve to preserve, if not strengthen, the company's relationships with its customers.

Data plays a pivotal role in **both** endeavors. It lets brands know what it takes to connect, while also giving all stakeholders transparency into the impact of their initiatives.

Emphasis on experience design

Per CCW Digital's Market Study on Trends In CX Design & Strategy, a whopping 72% of organizations call "experience design" a priority focus. It is actually the leading strategic topic, outranking popular trends like customer automation and digital transformation.

Great experience design initiatives utterly hinge on strong customer intelligence. Without a clear sense of who customers are, what they want and how they feel at all critical junctures, it is impossible to design a valuable experience.

Customers demand more accountability

Customers know brands are investing in data. They are familiar with feedback surveys, and they know some organizations use tools to more deeply analyze calls.

They are not, however, confident brands are *doing* anything with the data they are collecting. A mere 11% of consumers feel organizations take their feedback very seriously. It should therefore come as no surprise that only 12% believe most brands have made significant improvements to their experiences.

The takeaway here is simple: customers expect brands to know them and then use that knowledge to create better experiences.

Omnichannel complicates the interaction

The glass half-full approach to omnichannel: more touch points create more opportunities to connect with customers.

The glass half-empty approach to omnichannel: more touch points create additional silos in the organization.

The glass half-empty approach, sadly, reflects the reality for many organizations. They may be collecting data at different touch points, but they are not unifying this data to gain a truer portrait of their customers.

Organizations identify the “lack of a 360-degree customer view” as one of their biggest struggles.

Not simply a problem for collecting and analyzing data, systemic silos also thwart efforts to use data. When systems and channels are not connected, the organization cannot consistently put the right data in the hands of the right agent at the right time.

AI is changing the game

Thanks to the power of artificial intelligence, companies and customers are becoming more comfortable with self-service. Customers actually *will* attempt to solve problems on their own.

As they do not involve live agents, these self-service interactions are *entirely* reliant on the quality of companies’ internal data and knowledge bases. If the internal data is insufficient, there is no human employee to “interpret” the information and save the experience. The interaction fails.

The rise of self-service is also impacting the customer contact workflow dynamic. With customers handling issues on their own, agents will primarily focus on more complex interactions. In order to properly (and efficiently) handle these interactions, they will require instant access to robust insights.

The biggest analytics mistakes



The aforementioned marketplace trends underscore why customer intelligence is more important than ever. Knowledge of that reality is not, however, turning all contact centers into data powerhouses. Many are making mistakes with how they approach analytics. As a result, their data is not as complete or actionable as they require. In turn, their customer experiences are not as efficient or customer-centric as possible.

Some of the biggest mistakes follow.

(No strategy for data)

There is a reason “experience design” is becoming such a popular topic in the customer contact space: leaders understand the importance of acting with purpose and structure.

Purpose and structure are particularly important for customer intelligence. Without a clear sense of what problem or opportunity it is trying to address, an emphasis on identifying the “root cause” of the issue, an understanding of who can benefit from the data, and a plan for helping them take action, the data will never be “actionable.” It will never lead to meaningful disruption.



“It's really about creating a discipline and a prioritization on that purpose. You need to get really crisp and clear about what it looks like in action. What is it? What isn't it? Unless you have gone through the effort to do that, you can expect to need to come back to create a new purpose in a couple of years.” - **Aransas Savas, Senior Director of Service Design & Studio Experience, WW**

(Wrong standard for actionable)

There is another reason data sometimes does not become actionable: organizations are setting the bar too low.

Many organizations do not set any standard whatsoever for their data — they simply like to collect feedback and occasionally discuss it during strategy sessions. Some may trumpet the importance of “actionable” intelligence, but they are actually focusing on prescriptive insights. They look for insights that help recommend actions but do not create *mechanisms* for getting that data in the right hands.

Organizations may also exacerbate the situation by emphasizing *results rather than drivers*. It is important to know one's retention rate or customer satisfaction level, but they also need to know why their scores are what they are. It takes an understanding of the “why” to figure out the “how.”



“Actionable analytics go beyond providing important insights to providing the user with access to the systems for collaboration and execution to take the necessary steps with that insight. For example, surfacing analytics on the customer’s history on a case record allows agents to quickly see insights about open sales opportunities, CSAT and volume of cases open, and allows them to personalize the conversation with the customer and potentially resolve multiple issues at once.” - **Martha Walchuk**, Senior Director of Product Marketing, Salesforce

Fragmented data sources

Eighty-two percent of companies say their customers typically have to repeat information when switching between channels.

That statistic underscores the harsh reality of silos in today’s customer contact functions. Companies do not have a consistent, 360-degree view of their customer journeys, which means they have a limited understanding of their customers *and* a limited ability to actually take action.

Granted, it actually takes *more* than a view of one’s own journey to truly understand customers. The most customer-centric brands know to look outside their organizations; customers’ social media posts, brand preferences and purchasing habits help form a more complete picture of buyers and the overall marketplace.

Not simply a systemic issue, data fragmentation is also a consequence of organizational structure. Some organizations lock data away for senior management’s eyes only, and thus prevent the relevant stakeholders from understanding the “why” behind their roles.



“We work very closely [with other teams], because we believe insights are embedded not just through our customers but throughout our entire organization. We make it our mission [as service designers] to tap into existing expertise and really look for ways to make that shine so that we can make better products and experiences faster, that other teams believe in, buy into, and can really advocate for.” - **Aransas Savas**, Senior Director of Service Design & Studio Experience, WW



“Customer analytics are locked away only for managers, directors and/or executives to use. [Data] isn’t democratized so that individual contributors and front-line representatives can take advantage of it.” - **Martha Walchuk** , Senior Director of Product Marketing, Salesforce

Granted, simply making the data available to all stakeholders will not drive disruption. It is important to make these individuals part of the data collection and execution processes.



“The expectation of the organization is that making the data available across its customer-facing representatives is good enough. But, ultimately, the lack of training on how to interpret data for customer-facing representatives limits its effectiveness to impact organizations.” - **Martha Walchuk** , Senior Director of Product Marketing, Salesforce

(Inadequate emphasis on the journey)

Customer journey mapping is a popular exercise, but it rarely factors into the customer intelligence strategy. Fewer than 10% of organizations use their journeys to build customer profiles or understand customer intent.

More broadly, few brands really think about the journey when attempting to make sense of customer intelligence. Suppose, as an example, sentiment insights reveal that a customer was unhappy during a recent phone interaction. A journey-minded organization would consider how the process of *getting* to that phone call impacted sentiment. Was there a lot of waiting? Did the customer initially try to use a digital channel? Was it hard to find the phone number?

The typical organization, however, only focuses on the end statistic: the customer was unhappy during the phone call. Something must have gone wrong during the conversation.



(No mechanism for putting data into action)

Intelligence is only “actionable” when the relevant entity can *use* the data to better perform their work. Few organizations have built a mechanism for driving this action.

They may invest tirelessly into collecting, analyzing and reporting data, but that effort is ultimately for naught if they cannot take immediate action based on the insights.

If CCW research can confirm statistics like “17% of agents receive no context whatsoever when customers escalate” and “82% will require customers to repeat some information,” it is clear the data agents need to take action is rarely at their fingertips.

(No accountability for the data program)

The purpose of an action is to achieve a result. It, therefore, makes sense to hold so-called “actionable analytics” accountable for producing favorable business and customer experience outcomes.

Not all organizations have adopted this approach. They may collect and use data, but they are not *measuring* its impact. In turn, they do not know whether they are approaching customer intelligence in the right way.

Signs of an actionable approach to customer intelligence

The challenges may be plentiful, but they are not insurmountable. The mistakes may be obvious, but they are not unavoidable. There are indeed ways to develop a more actionable approach to customer intelligence.

There are ways to turn unstructured customer insights into clear-as-day drivers of great customer outcomes.

The following six signs reveal that a company is taking an actionable approach to its intelligence.

(Strong “AI” component)

When considering potential AI use cases, leading organizations prioritize customer analytics. They know that AI can collect, visualize and share meaningful customer intelligence at a breakneck pace.

As a result, they leverage AI to analyze all interactions and every component of their customer journeys. They uncover pivotally useful insights into customer preference, intent and sentiment, while also drilling down into true sources of agent inefficiency and frustration.

Whether the goal is to orchestrate better journeys, improve product offerings, better train agents, or to arm agents with useful “context” for each call, AI steers organizations to success. It lets them reach that ideal scenario in which technology is helping — not hindering — agents in their pursuit of stronger customer connections.



“By using machine learning techniques, organizations can understand the predictiveness of particular data for the outcomes they want to achieve, and similarly, certain data having a lack of impact on the outcome. Organizations are able to then prioritize insights based on how they impact and achieve the outcomes they desire.” - **Martha Walchuk**, Senior Director of Product Marketing, Salesforce

Data “team” with clear objectives

The power of AI does not preclude the impact of human employees. Truly customer-centric organizations rely extensively on their human workforce to make the most of their intelligence programs.

More specifically, they form data “teams” that assume responsibility for all facets of the data journey. Consisting of customer contact experts, business analysts, data scientists and technology leaders, these teams identify the business problems they hope to solve with data. They design processes for collecting and unifying data, while “tuning” their automation solutions to perform as efficiently as possible.

They additionally turn intelligence into “stories” that will resonate with all key stakeholders. After securing buy-in, they create frameworks for helping the stakeholders take action. Finally, they measure the impact of the company’s data investments.

All data sources in a single interface

It takes a 360-degree view of all customer interactions — including external data points — to deliver a seamless, consistent experience across all channels.

A comprehensive view also enables organizations to gain a more accurate sense of what is happening within its overall experience journey. Issues that are arising in the phone channel, as an example, may be connected to problems occurring in live chat.



Customer-centric organizations do not simply possess a view of this caliber; they also ensure it is accessible from a single, intuitive interface. When agents have seamless access to issue context, historical CRM data, the call queue and relevant knowledge entries, they can take swift and meaningful action to support customers and the bottom line.



“It's important to have all the insights possible, not only to drive performance through the call center but to make business decisions ... What's working? What's not working? How can I really target the areas of opportunity ... this is where I need to go, this is my direction ... that actually brings out success.” - **Manny Marrero, Director of Operations, Getaroom**

Understand — and augment — agent performance with context

The customer contact community may use terms like “customer insights” or “customer analytics,” but the data does far more than tell companies about how customers feel.

It, for example, can provide a wealth of insights about how *agents* are performing. In fact, insofar as agents play such a powerful role in shaping the user experience, one can argue that they are the most important focus of “actionable analytics.”

Actionable analytics can uncover relevant performance gaps (both during interactions and on the aggregate) and thus inform live call takeovers, training needs and broken processes.

They can also provide agents with the context they need to deliver the best possible interaction.

Journey orchestration based on actual customer needs

By providing agents and bots with fast access to relevant context, customer-centric organizations improve interaction quality. By leveraging intricate details about the entire engagement lifecycle, they can also elevate the overall customer journey.

Indeed, leading organizations view data through a macroscopic lens. They look for key trends in what customers want, how they engage, and how every single element of the journey strengthens or weakens satisfaction.

With these insights at their disposal, they are able to constantly retool individual processes. They are able to consistently direct customers down the most valuable possible path.

Emphasis on predictive and proactive opportunities

Less than 25% of organizations are able to leverage the power of “predictive” insights about their experiences. A similarly small number of companies are making “effective” use of proactive engagement; the typical proactive experience is more annoying than empowering.

Customer-centric organizations do not tolerate these gaps. They do not allow themselves to deliver “reactive” or “imposing” experiences.

They make predictive insights — and proactive engagement — cornerstones of their data initiatives. By harnessing a 360-degree view and the power of AI, they can consistently predict customer intent and then consistently guide agents to deliver the best experience possible. They also use deeper insights to determine where, when and why customers appreciate proactive communication.

The result will be higher conversions, less effort, and a stronger sense of appreciation for customers.



About the Author



Brian Cantor, Principal Analyst & CCW Digital Director Customer Management Practice

Brian Cantor is the principal analyst and director for CCW Digital, the global online community and research hub for customer contact professionals. In his role, Brian leads all customer experience, contact center, technology and employee engagement research initiatives for CCW Digital’s series of reports. CCW Digital’s articles, special reports, commentaries, infographics, executive interviews, webinars and online events reach a community of over 150,000. A passionate advocate for customer centricity, Brian regularly speaks on major CX conference agendas. He also advises organizations on customer experience and business development strategies.

Meet Our Analysts



Brian Cantor
Principal Analyst &
CCW Digital Director



Michael DeJager
Principal Analyst & Divisional Director
Experience Design Series



Max Ribitzky
Principal Analyst,
Go-to-market Research



Nadia Chaity
Senior Analyst, CCO Series



Sandy Ko
Research Development
Analyst, CCW Series

Get Involved



Ben McClymont

Business Development Director

E: Ben.McClymont@customermanagementpractice.com

P: 212 885 2662



Simon Copcutt

Head of Strategic Accounts

E: Simon.Copcutt@customermanagementpractice.com

P: 212 885 2771

Upcoming Events

SEPTEMBER

CX Week Canada

September 23-25, 2019

Chelsea Toronto, ON

www.customercontactweekdigital.com/events-cxweekcanada

OCTOBER

Service Design

October 15-17, 2019

Chicago, IL

<https://servicedesignweek.iqpc.com/>

NOVEMBER

Chief Experience Officer Exchange

November 3-5, 2019

Miami, FL

www.customercontactweekdigital.com/events-chiefexperienceofficereexchange

JANUARY

Customer Contact Week Nashville

January 28-31, 2020

Nashville, TN

<https://www.customercontactweekdigital.com/events-customercontactweekwinter>