CCW CUSTOMER CONTACT WEEK DIGITAL

CCW Digital: Special Report Series

Customer Experience Personalization

December 15, 2017

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Personalization is the heart of the customer experience and the hallmark of customer centricity. 66% of businesses view personalization as a defining quality of a customer-centric brand.

quadient
customer experience. activated.

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Personalization: The Heart of the Customer Experience

"Treat your customers as people, not numbers" is one of the most famous adages in the business world.

It speaks to the notion of viewing customers as individuals who have unique preferences, expectations and emotions. It promotes the idea of intimately understanding the specific customers with whom one does business.

It presents personalization as the heart of the customer experience.

Defined by Tamir Sigal of Quadient as an experience that leaves customers "feeling as though their interests, behavior and preferences were thoroughly taken into account," personalization is a popular discussion topic for customer management professionals.

It is viewed as the hallmark of customer centricity; 66% of businesses believe it is a quality that best *defines* customer-centric brands.

It, more importantly, is a pivotal strategic focus. 96% of organizations call personalization important to their customer experience strategies for the coming year. Fifty percent plan to maintain or increase their existing personalization efforts, while 30% plan to imminently begin investing in personalization.

While a glass half-full individual may be celebrating these statistics and concepts, a glass half-empty one may have some questions.

If “treating customers as people” has been customer management gospel for decades, why are businesses only just recently beginning to make personalization a top strategic focus? If personalization is the defining sign of a customer-centric brand, why do so few organizations deliver legitimately personalized experiences?

Those questions of skepticism have some very logical answers. Like many key customer management endeavors, “personalization” is victimized by a combination of organizational uncertainty, inertia and inefficacy.

Organizations may value the theoretical idea of tailoring experiences to individual customer needs, but they do not necessarily have a firm grip on the practice. They do not necessarily know what a tailored experience entails.

Even if they do, they may not be wholeheartedly committing themselves to delivering personalized experiences. As business leaders (and customers) know all too well, talk and walk are two vastly different things.

The organizations taking action, moreover, may not be taking the right action. Are they personalizing experiences as effectively – and as completely – as possible?

Mindful that personalization is the heart of the experience, this report is aimed at uncovering and eliminating those roadblocks.

It begins by revealing a proprietary “personalization spectrum” that details what personalization means and why it is important. It subsequently addresses two myths that are hindering acceptance of personalized experiences, before investigating challenges that are preventing even particularly passionate supporters from achieving success.

It concludes by sharing specific strategic and technological solutions for overcoming the challenges.

Ultimately, the report empowers organizations to deliver experiences that yield more efficient interactions, more meaningful customer relationships and more desirable business results.

Understanding the Personalization Spectrum

Personalization – the idea of tailoring a customer experience to the individual interests, behaviors, needs and preferences of customers – may be a straightforward concept, but it is not a binary one.

There are various degrees of personalization. There, moreover, are numerous ways in which organizations incorporate personalization into their experiences.

Some organizations outright oppose the idea. Others pay lip service to the notion but do not truly immerse themselves in the practice.

Disparity even exists among those who are fully committed to personalization. While one contingent commits wholeheartedly to the idea of meaningfully connecting with customers, another primarily leverages personalization to make interactions more productive.

In formulating a customer experience strategy, it is important to explore the full “personalization spectrum.” Not simply a snapshot of the various ways in which organizations are tailoring experiences, the spectrum reveals how personalization factors into the overarching customer experience mission.

The spectrum illustrates how personalization can assist with goals like reducing customer effort, shrinking inbound call volume, increasing revenue and building lasting customer relationships.

The impositional experience

Personalization may be a widespread priority in theory, but not all organizations are taking action. Some opt not to deliver personalized experiences. Rather than taking into account specific customer needs, these organizations simply offer a finite number of engagement options and adhere to a strict, static, scripted set of processes. Customers can either accept what the organization is offering – or take their business elsewhere.

The “impositional” approach may involve viewing the CX strictly in terms of “inbound customer service.” There is no effort to optimize the overall journey.

In Practice:

Many contemporary Internet companies – even ones with fairly "pro-customer" mission statements – choose to offer impositional experiences. They notoriously refuse to offer access to live customer service representatives, limiting support-seeking customers to knowledgebases and community message boards.

Passive Personalization

Instead of actively tailoring experiences to specific customers, the passive approach involves providing enough options and flexibility to accommodate most customer preferences. Customers will often have access to the core experience they desire (and thus sense some "personalization") even though the brand did not consciously consider their individual needs.

In Practice:

A brand that offers resolute, 24/7/365 engagement in all major communication channels will be able to accommodate the rudimentary preferences of most customers. Customers will not necessarily feel special, but they may value the idea that they did not have to make sacrifices to engage with the business. They will feel as if the business cares.

Polite Personalization

In an effort to prove that they view customers as people rather than as numbers, some organizations offer a "polite" degree of personalization. Leveraging information from CRM systems, agents will greet customers by name. They may also reference material facts about the customer in inbound and outbound communication. Polite personalization is about demonstrating superficial recognition of the customer. It does not involve customizing the actual engagement experience.

In Practice:

At the onset of a call, Amazon's customer support representatives will thank customers for being Prime members. In doing so, the agents are confirming that they recognize the customer as an individual. They are not necessarily promising that the ensuing experience will be uniquely tailored to the customer's needs or personality.

Productive Personalization

For some organizations, personalization involves more than recognizing customers. It involves using information about a specific customer to actually optimize the experience. This "productive" form of personalization is not about engaging in deep conversations or making friends; it is about using contextual knowledge to reduce customer effort (particularly repetition of information), route customers to the right agent or resource and provide the fastest, yet most valuable resolution possible. By understanding who the customer is and why the customer is likely interacting, the business can deliver an optimal response.

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You don't [necessarily] want the customer to say 'hey, that's personalized' - you just want them to have a great experience that is seamless for them," says Johnny Russo of Mark's regarding a "productive" approach to personalization.

In Practice:

A customer running late for a 12PM flight calls the airline company. The airline company's system matches the number to the reservation, presumes the customer has an urgent inquiry regarding the flight, and immediately passes the customer to an agent who can help. When the agent picks up, the agent already knows that the customer is likely running late and is equipped to offer instructions, explain the "missed flight" policy, and recommend alternative options for getting to the destination.

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For us, we look at localization," adds Russo. "Today, in Calgary, it's cold and snowy. Why wouldn't the entire content on our website dynamically change in this part of the country to outerwear, jackets, coats, gloves and boots?

If the visitor is instead coming from an area where it's rainy, "maybe we [display] rain jackets and lighter sweaters."

Fast Fact:

32% of businesses identify "productive personalization" as a top priority for 2018, making it the #6 focus.

Predictive Personalization

Productive personalization will often involve an "anticipatory" element, but it is ultimately about improving a single interaction. Some businesses go beyond the interaction – and optimize the overall journey. These organizations leverage a "predictive" form of personalization. Using existing data about the customer's purchases, personality, preferences and support history, they predict – and cater experiences to – a customer's future needs and behaviors.

In Practice:

A bank notices that a basic checking account customer has maintained a balance in excess of $5,000 for the past few months. The institution proactively contacts the customer to recommend switching to a premiere account that includes interest and a $500 signing bonus for customers who deposit more than $5000. They also help the customer seamlessly make the switch.

A family of four from Boise, Idaho books a 5-night stay at an Orlando-area hotel. Prior to the check-in date, the hotel emails the customer coupons for Universal Studios tickets, a schedule of the shows at Disney World, and details on the hotel's free amusement park shuttles.

A cable company notices that several customers with a certain router have been experiencing Internet connectivity issues. The company sends other customers using that router a text with instructions on resetting the device and changing the Wi-Fi channel. It also provides a direct dial-in number for the Internet support department.

The last five times a customer called, he repeatedly screamed "representative" to bypass the IVR. This time, the customer does not receive an IVR prompt. He is routed directly to a live agent.

Speaking about his organization, Russo considers a situation in which a longtime female customer who typically buys clothes for her husband and son returns to the Mark's Work Wearhouse website. Whereas a new female customer may be directed to women's apparel, the returning woman would be greeted with deals on menswear.

Fast Fact:

Proactive and predictive engagement are undoubtedly on the radar; 27% call proactive engagement a top CX focus for 2018, while 22% say the same of predictive engagement.

Poignant Personalization

Some customer management thought leaders urge businesses to go beyond "support" and engage in deep, meaningful conversations with customers. These thought leaders are advocating for poignant personalization. Rather than optimizing the purchasing process or support experience, poignant personalization involves building human "connections" with customers. Agents will ask questions to get to know customers as people with backstories, interests and hobbies.

In Practice:

While working on a support issue in May, the agent will ask the customer about summer vacation plans. When the customer calls back in September, the agent will ask how that vacation went. This line of conversation is focused on getting to know the actual customer; it has nothing to do with the product issue at hand.

During a recent interaction, a Seattle-based customer revealed that she has season tickets to Seahawks games. In an email regarding a recent order, the representative includes "PS: Go Hawks!" in the footer.

Fast Fact:

13% identify poignant personalization as a top priority for 2018; organizations clearly view productive personalization as more essential.

Personalization: Overcoming inefficient misconceptions

In a recent CCW Digital survey, consumers confirmed an affinity for fast, frictionless, resolute experiences.

A whopping 70% identified “resolution on the first contact” as a top priority when interacting with a business, making it the leading customer demand. Prioritized by 69% of customers, a “fast resolution” is a similarly resounding demand.

Other key demands – short wait times before reaching a live agent (65%) and “ease” of getting the desired information or resolution (64%) – also speak to the notion of quick, simple experiences.

On the surface, the data may seem like a blow to the notion of personalization. Customers care about getting the information they want as quickly as possible. They are not seeking intimate “connections” with agents. They do not desire deep, nuanced conversations.

Is the business world actually *wrong* to associate “personalization” with “customer centricity”?

The answer is a resounding no.

While the data may suggest that *poignant personalization* is superfluous in some circumstances, it most certainly does not discredit the overall idea of personalization. It actually underscores the importance of the concept.

Personalization – particularly of the “productive” and “predictive” varieties – helps a business deliver fast, frictionless, resolute experiences. By leveraging specific details about customers and the contexts of their interactions, businesses can get customers what they want with as little effort or wasted time as possible.

And while "poignant" personalization may not reduce talk time, it does help a business better understand its customers' personalities and demands. It can, therefore, reduce effort (by routing customers to the right agent), reduce time to resolution (by asking questions in a manner that makes the most sense to the specific customer), improve first contact resolution rate (by delivering the outcome most appropriate for the individual customer) and empower proactive engagement (by revealing customer preferences).

Personalization is not an enemy of "frictionless" experiences. It drives them.

In addition to incorrectly claiming that it conflicts with the customer demand for fast, low-effort experiences, some allege that "personalization" also undermines operational efficiency.

Employees that spend time tailoring experiences and conversations to individual customers, these doubters argue, are not performing as productively as possible. They are spending more time than needed per interaction – and thus accomplishing a suboptimal amount of work.

This, too, is a flagrant misconception.

For starters, "personalization" is not strictly a task for employees. By collecting, analyzing and reporting necessary data about customers, technology can play an instrumental role in the personalization process. It helps the business quickly – and properly – tailor experiences to customers.

In most cases, technology actually automates the personalization process.

Granted, some personalization endeavors may require heightened initial effort from team members. Instead of reading generic answers from a script, employees may need to analyze the customer's personality, assess the specific context of the situation, and carefully construct unique responses.

This effort, however, yields significant short- and long-term returns.

In the short-term, "personalization" ensures the agent is communicating the most relevant information in the manner most valuable to the customer. The agent will not need to repeat, restate or rethink responses and may actually end up spending less time in each interaction.

These higher-quality experiences will also yield greater customer satisfaction and loyalty, which should yield long-term revenue growth. Even if the organization did sacrifice some efficiency in the short-term (and that will doubtfully be the case), the greater revenue would be a worthwhile reward.

To truly elevate their customer experiences, businesses must ignore the misconceptions.

Personalization is not undesirable in a marketplace that values speed. It is not impractical for an operation that values efficiency.

It is actually a ticket to maximizing both.

Personalization: Journey to Opportunity

When thinking about personalization, thought leaders and businesses have a tendency to fixate on the offer phase. They devise clever, robust strategies for delivering targeted marketing messages to potential customers.

This is an undoubtedly valuable endeavor. Customers endure a plethora of advertising in all communication channels. Thanks to the web, they also have the power to quickly seek out information about potential products.

Brands that can cut through this noise – and communicate the value of their products in a manner that meaningfully resonates with particular customers – stand the greatest chance of winning business. Customers will not simply view their products as "options." They will embrace them as preferences.

Targeted customer acquisition, indeed, confirms the value of personalization.

It does not, however, speak to the *entire value* of personalization.

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Over the past several years, many organizations have invested heavily in marketing technologies that are geared primarily toward the 'buy' phase of the customer life cycle," says Sigal. "But the truth is, once you've earned a new customer, the rest of the customer journey is even more important. And that's where many organizations fall short."

"Personalization" is not merely a marketing initiative. It is a customer experience imperative that must impact all facets of the journey.

As Sigal notes, personalization has far more relevance after the initial point of purchase.

In a marketing context, personalization is primarily about presenting the right product to the right person at the right time.

In a broader customer experience context, personalization helps optimize every facet of the journey.

It is about anticipating why a customer may contact and being armed with the most valuable possible resolution. It is about predicting what a customer will want next and delivering it before they even ask. It is about determining where a customer prefers to engage and eliminating barriers to engaging in that channel. It is about respecting and understanding the language a customer uses and communicating in corresponding terms.

"By providing deeply personalized and seamless experiences across your customers' preferred channels throughout the entire customer journey, you build more loyalty, increase retention, create advocates and ultimately improve profitability," declares Sigal.

Leveraging personalization for retention is the astute business play.

Extending existing relationships is famously more economical than developing new ones. By leveraging personalization for retention, organizations will receive a greater "bang for their buck."

The cost of an ineffective experience journey is, moreover, more significant than that of an impersonal marketing message.

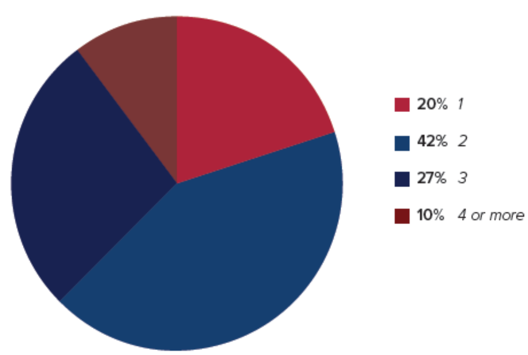
If a company errs in its marketing message, it simply fails to attract a potential customer's interest. It can always attempt to court that customer at a later date.

If a company errs in a later phase of the customer experience, however, it risks losing an existing customer – and the future revenue on which it was banking. CCW Digital research reveals that 62% of customers consider switching to a competitor after just 2 bad experiences. Some never return, while nearly 90% communicate their horror stories with friends, peers and/or social media followers.

The stakes of the customer experience heighten as the journey progresses, which means the importance of personalization increases after the initial point of purchase.

A company that recognizes the importance of targeted marketing should absolutely acknowledge the significance of journey-wide personalization.

How many bad experiences would it take for you to consider switching to a competitor?



Source: *CCW Digital Executive Report: Customer Experience*

Challenges on the Road to Personalization

The road to personalization may be a lucrative and important one.

It is not, however, an easy one.

For starters, a business must embrace the importance of personalization. As this step has historically represented a hurdle for many businesses, it would be a grave mis-take to take it for granted.

Customer management professionals may identify personalization as the quintessential display of customer centricity, but their overall businesses are not necessarily on board. Some organizations – particularly those who view the customer experience as a “cost” or “necessary evil” rather than as an instrument of value – have historically questioned the necessity. Viewing the customer experience purely in a transactional context, these organizations dismissed efforts to personalize the journey as superfluous.

Others may have opposed (and continue to oppose) personalization a different ground: compliance. Despite fully understanding the theoretical value of personalization, these organizations feel uncomfortable allowing agents to break from scripts, templates and protocol.

Philosophical acceptance of personalization is, of course, on the rise. While support is not quite universal, it is definitely becoming more widespread in today’s era of customer centricity.

Talking the talk is not, however, the same as walking the walk. Organizations may generally understand the theoretical value of personalization, but they are not necessarily delivering personalized experiences.

They are not necessarily incorporating personal customer data into their self-service platforms. They are not gearing communication to individual buyers rather than the market at large. They are not empowering agents to tailor conversations to customer needs.

Until they take action, personalization will remain an intriguing idea rather than an actual tenet of the engagement experience.

While some organizations have certainly taken action, many have not taken enough action. They may have incorporated shallow personalization tactics into some customer interactions, but they have not begun creating completely personalized customer experience journeys. They have not created a structure in which every customer is receiving the optimal experience at all phases of the relationship lifecycle.

That final stage is the most valuable chapter on the road to personalization. It is the stage in which the business creates the deeply personal, utterly seamless experiences that yield satisfaction, loyalty, advocacy and revenue.

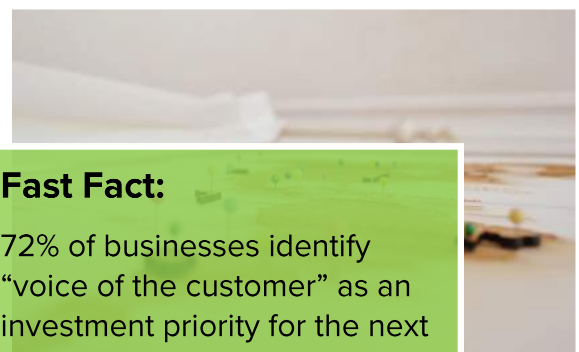
It is also the most daunting chapter. Its requirements do not simply hinge on philosophy and motivation; they hinge on legitimate capability.

Numerous challenges threaten that capability.

Inadequate data

All forms of personalization – from passive to poignant – hinge on data. If the organization does not have insight into its customers, their needs, and their behaviors, it has no prayer of tailoring its experiences. It has no prayer of seeing the customer as more than a “number.”

Many organizations are left in this unfortunate boat. The omnichannel world may be providing brands with numerous touch points at which to collect data, but not all organizations are in position to seize the opportunity. Their systems lack the capability and their agents lack the expertise to actually mine data from customer interactions.



Fast Fact:

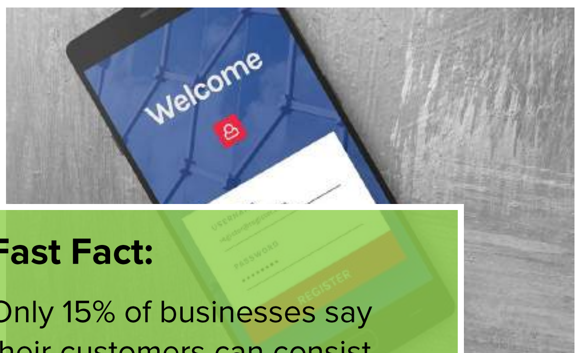
72% of businesses identify “voice of the customer” as an investment priority for the next two years.

Other companies may possess the ability to actually collect this data, but they lack the tools to parse, analyze and present this data in an actionable form. They technically have the information they need to personalize experiences, but they have no mechanism for actually using it.

The existence of silos exacerbates this challenge. The data a business *does* collect may be locked in certain systems or departments and unavailable to business users responsible for different phases of the journey.

No single customer view

To sufficiently personalize an experience, the business must have a universal profile for each customer. Without this single view into the customer's past interactions, purchases, emotions and experiences across all touch points, channels and business units, the organization does not have the context it needs to tailor future interactions. It cannot be certain it is creating the most optimal, most relevant experiences possible.



Fast Fact:

Only 15% of businesses say their customers can consistently move between channels without repeating themselves.

Many businesses lack this pivotal component of personalization. Some have no customer profiles whatsoever; they process transactions and support inquiries without cognizance of the specific individual they are supporting. This is often true of brick-and-mortar retailers, whose customers do not have to login to any account or system when making purchases.

Others develop fragmented profiles. They can track a single customer's interactions within a single channel or business unit, but they have no window into where and how else the customer has interacted.

> "Without integration, it is impossible to make a customer feel as though their interests and preferences have been taken into account, because, in reality, you only have access to the limited amount of information in the database you are referencing at the time," explains Sigal.

No journey map

In order to personalize the journey for each individual customer, the business needs to understand what the journey entails.

This perspective cannot be taken for granted. Lacking journey maps, many businesses have little to no insight into how customer interactions and relationships progress over time. They view each interaction – whether related to a purchase, upgrade, support inquiry or complaint – as an isolated event that requires an isolated response.

Without knowing where customers tend to go "next," the business will be unable to provide the best possible experience when they get there.

Improper training

As it is an inherently "human" exercise, some organizations and thought leaders presume agents have the ability to personalize experiences.

Such a presumption is misguided.

Insofar as many customer experience functions have historically positioned agents as scripted "robots" that offer generic answers to all questions, they have not necessarily cultivated an ability to personalize. They have not prepared their agents to adapt to the nuances of specific customers and specific issues.

Without that training – without that advisement on how to appropriately recognize, anticipate and satisfy specific customer quirks – employees will be unable to meaningfully (and certainly not swiftly) tailor experiences to customers. They will not be the vessel through which the business can connect with customers.

Restrictive processes

Employees need more than means and motive to connect with customers. They also require opportunity.

Many businesses fundamentally prevent – or at least restrict – agents from meaningfully tailoring experiences to customers. They either outright require agents to stick to the script or require that they receive approval from supervisors or other departments before issuing tailored information, resolutions, offers or documents. The former completely prevents personalization, while the latter slows it to the point of futility.

Either way, the organization strips agents of the power they need to customize experiences.

Lack of organizational alignment

One of the big lessons of the "era of customer centricity" is that the customer experience is a task for *all* business functions – not just the contact center.

Personalizing these experiences, similarly, requires collaboration and alignment from all departments.

To successfully guide a customer through a complicated technical support matter, a customer service or sales representative may need to collaborate, in real-time, with product, legal or IT experts.

To remedy a billing issue that a customer prefers to handle in live chat, the support representative may need to quickly communicate with the accounts receivable department.

The marketing team will meanwhile need to keep the sales and service teams completely apprised of new targeted advertising campaigns.

Existing organizational structures inhibit such collaboration on two fronts.

First, many lack the technical capabilities to achieve cross-departmental collaboration. Different departments cannot talk to each other, let alone seamlessly access each other's data.

Additionally, organizations do not always cultivate philosophical alignment regarding the importance of personalizing the experience. If different departments have fundamentally different goals, it will be impossible to ensure all act in the customer's best interest at all times.

Misguided use of technology

Personalization may be a "human" concept, but personalization efforts rely greatly on technology.

Technology helps organizations acquire and access the data used to personalize the experience. Without integrated technology that quickly presents the right information at the right time, human agents will be unable to tailor experiences.

Achieving this technological framework is a challenge for organizations, which often patch together fundamentally incompatible legacy systems.

Not simply a way to empower agents, technology often is the mechanism responsible for personalization.

Customers' demand for fast, frictionless, tailored experiences is not exclusive to live agent interactions. They expect the same caliber of care in self-service environments.

Some businesses overlook this reality. Incorrectly viewing self-service as a fundamentally generic, impersonal, "transactional" concept, they do not implement platforms that can access CRM systems and adapt to customer profiles, behaviors and communication styles.

They also fail to build a "data mining" component into their self-service platforms, thus missing the opportunity to build customer profiles based on what happens in self-service.

Ultimately, they neuter the impact of technology by underestimating its importance.

Overcoming the Challenges to Personalization

Personalization is the #1 sign of a customer-centric brand, a pivotal customer experience priority for businesses, a cornerstone of building connections with customers, and a springboard to other objectives like reducing customer friction and maximizing revenue.

It is undeniably important, which means the aforementioned challenges are incredibly problematic. Organizations must work to urgently overcome them.

These challenges, it should be noted, thwart more than an organization's ability to personalize experiences. They, quite simply, damage the overall health of the operation. Factors like "inadequate data" and misalignment between functions are fundamental burdens on the business.

Even an organization not quite sold on the value of "personalization," therefore, has tremendous incentive to take action.

Make data an objective

Data holds the key to any personalization endeavor. It, therefore, needs to be viewed as a paramount objective when interacting with customers.

To actualize this process, an organization must implement omnichannel analytics solutions at all touch points – including self-service/non-conversational ones. An organization should always be capturing insight into the quality of the experience and the individuals who are engaging.

Representatives should also be trained to ask (and report) questions that can be used to better-understand customer profiles. They cannot view *answering the question* as their only job; they must also commit to *learning about the customer.*

Fast Fact:

The top focus for 35% of organizations, “improving customer intelligence” is the #3 CX priority for 2018. Only effort reduction and automated engagement represent more widespread imperatives.

Establish a single customer view

“Customer data comes in through many different channels and combining data from multiple sources is almost guaranteed to create inconsistencies,” says Sigal. “Each customer should have one master record, so they will appear the same to everyone in the company, no matter which is consulted.”

By using a tool to consolidate and integrate data from all touchpoints, the organization gains a single, consistent, complete sense of the customer’s history, personality, sentiment and preferences. Drawing upon this information, the business – and its systems and agents – can make informed assessments and decisions about how best to not only handle the customer’s current issues but add meaningful value down the road.

In addition to helping the business tailor experiences, the master record boosts operational efficiency. Agents will not have to scour multiple databases to understand the customer’s request; everything they need will be accessible on one screen. They will be able to deliver accurate, useful engagement in the most timely manner possible.

Master records, moreover, help businesses see the “stories” – and opportunities – embedded in raw customer data.

“With real-time access to data, you have the ability to engage with your customers on a new level,” says Sigal. “For example, you can create dynamic account statements that illustrate the customers’ monthly service usage or spending habits using interactive charts and graphs—on their channel of choice.”

Make CRM Actionable

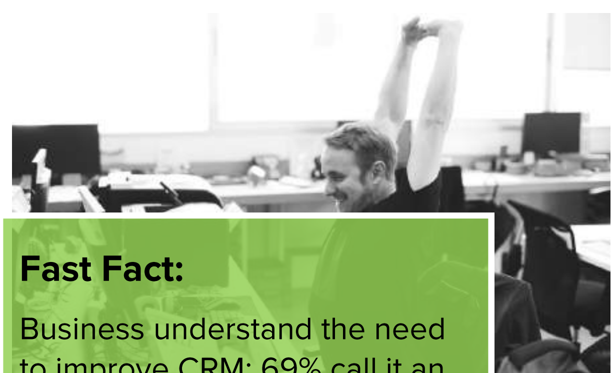
The recent CCW Digital Special Report on CRM reminds organizations to leverage CRM solutions for *customer relationship management rather than customer interaction recording.*

That approach plays a particularly pivotal role in personalization.

In order to tailor experiences to individual customers, agents and systems must have instant access to relevant data about that customer. This hinges on proper, omnichannel CRM integration.

Screen pops for inbound calls should not simply tell agents the name of the customer to whom they are talking; they should reveal specific details about the customer's purchases, support history and likely (if not definite) reason for calling. With this information, the agent can quickly focus on delivering what the customer really wants instead of spending time trying to figure out who the customer is.

Let CRM handle the recognition so that your business can focus on the execution.



Fast Fact:

Business understand the need to improve CRM; 69% call it an investment priority for the next 2 years.

Leverage Omnichannel CCM

CRM is not the only application that should be integrated across the organization. In order to deliver efficient, yet highly personalized experiences, business will also want to employ a centralized omnichannel customer communications management solution.

The best of these tools enable business users to quickly tailor complex communications and messages to individual customers. The communications span all channels, ensuring the business is able to deliver highly personalized and relevant information wherever the customer wants to connect.

A critical component of this technology is that administrators determine which parts of documents can be edited. This simultaneously fosters personalization and maintains compliance. Agents will be able to provide tailored material for customers without need-ing to consult IT or secure supervisor approval. Customers will not be asked to wait for the personalized experience they desire (if not require).

Modern CCM solutions also promote intradepartmental and interdepartmental collaboration on the creation of these communications. Breaking down the silos that hinder personalization (as well as the entire experience), CCM solutions grant access to business users from throughout the organization to create omnichannel communications from one centralized platform.

Each user can work on the tasks or documents relevant to their own departments, ensuring all users are working cooperatively to create the relevant, personalized, consistent and compliant communication for customers.

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Modern CCM platforms have the ability to not only handle the personalization of complex communications, but they also enable business users and subject matter experts to collaborate on the creation of communications with simple or sophisticated approval workflows created to connect various stakeholders," advises Sigal. "When evaluating a CCM platform, executives are advised to look for a solution that enables people in the business to create, edit, and manage personalized customer communications, instead of relying on IT users to make necessary changes."

Train Beyond the Script

In addition to coaching agents on the importance of data mining, personalization-driven businesses train agents on how to adapt to individual customers.

They coach agents on how to determine the "intent" behind certain customer requests. They train them on detecting behind customer requests (or, alternatively, the requests that are buried beneath heightened emotion). They also condition agents to express empathy when things go wrong and happiness upon providing value.

They, quite simply, use training to make agents comfortable being human brand ambassadors rather than scripted robots.

Build Personalization Templates

On the one hand, templates are the enemy of personalization. Personalization is about adapting to individual customer needs and issues, not resorting to default language.

On the other hand, templates can illustrate the importance of personalizing the experience.

By urging agents to ask certain questions and incorporate certain facts into the experience, businesses help them understand the value of personalization. They condition agents to recognize personalization not as a superfluous, "feel-good" initiative but as a strategy for making interactions more *productive*.

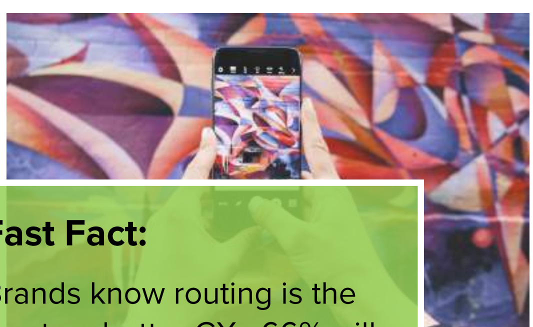
These templates, which may include directives to ask customers about their purchasing plans, experiences with a certain product or reaction to service from the new chatbot, help agents understand the kind of information that can later be used to expedite (and optimize) conversations.

Leverage Intelligent Routing

Personalization is predicated on the notion of connecting with customers.

No matter how well-trained the entire fleet of agents may be, certain agents are better-suited for connecting with certain customers.

In the interest of creating the most efficient (and most valuable) interactions, organizations should play into this reality. Leveraging modern-routing tools and rules, they can pass customers to agents best-suited for their issues or personalities.



Fast Fact:

Brands know routing is the key to a better CX. 66% will leverage improved routing to reduce customer effort.

These agents do not simply have the data and training required to tailor experiences but the personalities and expertise needed to best connect with the customers they are handling. The business will, ultimately, create the strongest possible connections in the shortest amount of time.

Map Customer Journeys

To consistently deliver the right experiences for its customers, an organization needs to understand when and why they will engage at different touchpoints. It must establish a complete journey map.

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> [Customer centricity is] not about thinking about customers - it's about thinking like a customer,” says Oke Eleazu of Bought By Many. “It's about really understand-ing what it's like to walk a mile in their shoes. Do you build processes and systems that are there because you understand what your customers go through?”

Leveraging this journey map, the organization can prepare its agents and systems to communicate in the manner best -suited for a given moment. It will also gain a better perspective of the pain points customers endure throughout the experience. This insight helps organizations identify opportunities to leverage "productive personalization." It also gives all stakeholders insight into how their actions are helping or hurting the experience.

> "Customer journey mapping helps to shift the focus of the entire company to put the customer front and center," notes Sigal. "It provides key stakeholders visibility into the entire end-to-end customer experience – to ensure the messaging and communications are consistent, the customer's voice is incorporated and the proper technologies are in place to deliver on the customer experience promise."

By forecasting where a customer may go next, the journey map also opens the door to more valuable predictive and proactive engagement.

Fast Fact:

Journey-mapping is definitely a priority for organizations. 97% identify it as important, while 80% of organizations have plans to start, maintain or increase investment into journey-mapping solutions. Journey-mapping, moreover, ranks as the #4 CX priority for 2018.

Deploy Chatbots

When it comes to personalization, organizations and customers can each have their cake and eat it too.

Businesses appreciate self-service because of its potential to reduce call volume and operating costs. Customers appreciate self-service because it can be quicker and more convenient than waiting for a live agent.

Historically, however, each party had to make sacrifices to reap these rewards. Businesses had to the negative ramifications of imposing a static, unintuitive, unnatural self-service experience on customers. Customers had to endure that suboptimal, impersonal experience in the name of avoiding live agents.

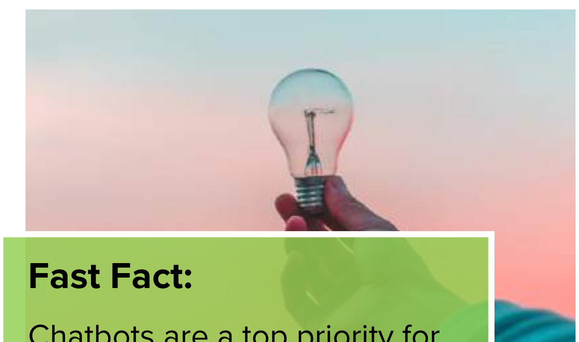
Chatbots – and other AI-driven tools – are lessening the need for such a sacrifice.

These self-service tools leverage real customer data, natural conversation ability and cognitive, adaptive qualities to personalize self-service to the individual customer. The resulting experiences turn the theoretical benefits of self-service into practical realities. The conversations are quick, convenient and digital – yet also accurate, customized and valuable.

Bots are also data-driven, which helps the business use self-service opportunities as a chance to learn about the journey and build customer profiles. This data can lead to better personalization efforts – and stronger overall experiences -- down the road.

“

You really want them to love it [and not merely tolerate it],” says Sean Rivers of Republic Wireless regarding the optimal use of chatbots. “That's what we're looking for - for the member, the customer, the user, internal people - getting them to love it depends on the person and the issue. We have all these tools to learn what people really want and to really understand who's on the other end of that interaction.”



Fast Fact:

Chatbots are a top priority for businesses, which means self-service is about to become a great deal more personalized. “CX automation for engagement” is the #2 CX priority for 2018.]

Personalization: The Heart of a Better Experience

Personalization is not a gimmick. It is not an enhancement or a way to add some superficial "personality" to a business transaction.

It is the driving force behind better experiences.

Personal insights enable businesses to deliver *more efficient, more frictionless, more resolute* experiences with customers. By aspiring for personalization, a business makes the engagement process easier, more enjoyable and more fruitful for customers.

They, more importantly, create the framework for *relationships* with customers.

The marketplace is competitive. Numerous different companies are constantly fighting for the attention – and wallet shares – of customers.

When it comes to their existing customers, businesses have an enormous leg-up. They already have access to valuable, actionable intelligence about who these customers are – and what they really want.

By using that information to not only *communicate* their products but *demonstrate* the extent to which they value the customer, they keep the customer invested in the relationship. The customer will want to keep working with this appreciative, understanding, value-oriented brand – and be increasingly willing to tune out messages from competitors.

Attracting that degree of investment – and commitment – is the ultimate goal of customer experience strategy.

It is the ultimate justification for personalization.

About Quadient

Quadient helps companies deliver meaningful interactions with current and future customers. A Neopost Digital Company, the Quadient portfolio of technology enables organizations to create better experiences for their customers through timely, optimized, contextual, highly individualized, and accurate communications for all channels. Our solutions bring together and activate the entire organization in the name of customer experience, through better collaboration and visibility into the customer journey.

Quadient supports thousands of clients and partners worldwide in the financial services, insurance and service provider industries in their quest to achieve customer experience excellence via mobile, digital, social media and print technologies.

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Brian Cantor authors the special reports series. In his role, Brian leads all customer experience, contact center, technology and employee engagement research initiatives. Citing this proprietary research, Brian authors the special report series.

Brian additionally serves as managing editor and director for CCW Digital, which is the largest web publication and community for customer experience professionals. CCW Digital's articles, commentaries, infographics, executive interviews, webinars and online events reach a community of over 140,000.

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.