



The art of building a great service strategy

by Martin Hill Wilson



Contents

03

Introduction

04

Stage one:
Deciding on a better way

06

Stage two:
Tracking new customer behaviour

08

Stage three:
Improving the quality of customer engagement

10

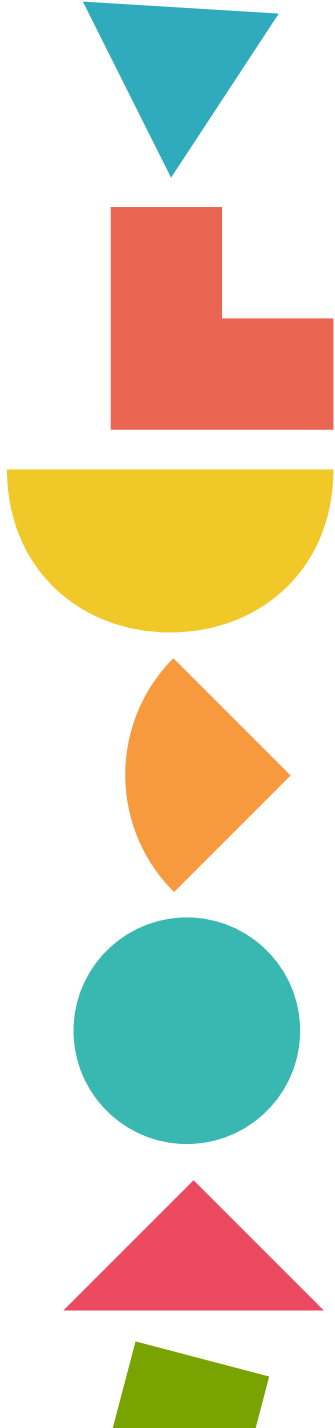
Stage four:
Optimising your engagement mix

13

Building your strategy - key learnings

14

In conclusion



Introduction

Customer service is not what it used to be. The same goes for contact centres. There are now too many moving parts to hope that an efficient ‘to do’ list will keep you up-to-date and produce service outcomes that work for both you and your customer.

This eBook outlines the key topics that go into a great service strategy and shows you how to tackle those topics in terms of strategic decisions. It is not our intent to provide concrete answers, because each organisation needs its own version. However, we can offer a framework and guidance on how to end up with something that works for you.

“Developing strategy is best done as a collaborative effort.”

STAGE ONE

Deciding on a better way

Contact centres are notoriously busy environments that demand your full attention with a never-ending stream of urgencies. At least that’s the way it can seem at the end of a long week. This means that it becomes very difficult to stay aware of the changes happening out in the marketplace in terms of customer behaviour and key trends.

Developing strategy is best done as a collaborative effort. The thinking that goes into it that matters as much as the output. To do this requires undivided attention in either a series of short bursts of 1–2 hours or as offsite days, if you can make that happen.

Assembling the strategy design team is your first task. Choose a broad array of perspectives; some might only be needed for certain topics, others will be core ones throughout the journey.

To prepare for your first session, gather a cross-section of trends that affect contact centres, for instance, it could be around culture and the latest thinking in employee engagement, or using new channels such as chatbots or messaging apps. It could even be about customer experience and the issues caused by organisational silos.

Use them to create awareness amongst the group as to how you collectively and individually tend to process emerging customer and market trends. The purpose of the exercise is to realise that a more aligned and strategic approach is needed, given the current speed of change. This new approach will be the start of a new way of working that has to function alongside day-to-day operational management.

Ask your team:

1.

How do you decide which topics are important?

2.

Do you connect with topics or trends?

3.

Do you respond with 'to do lists' or strategies?

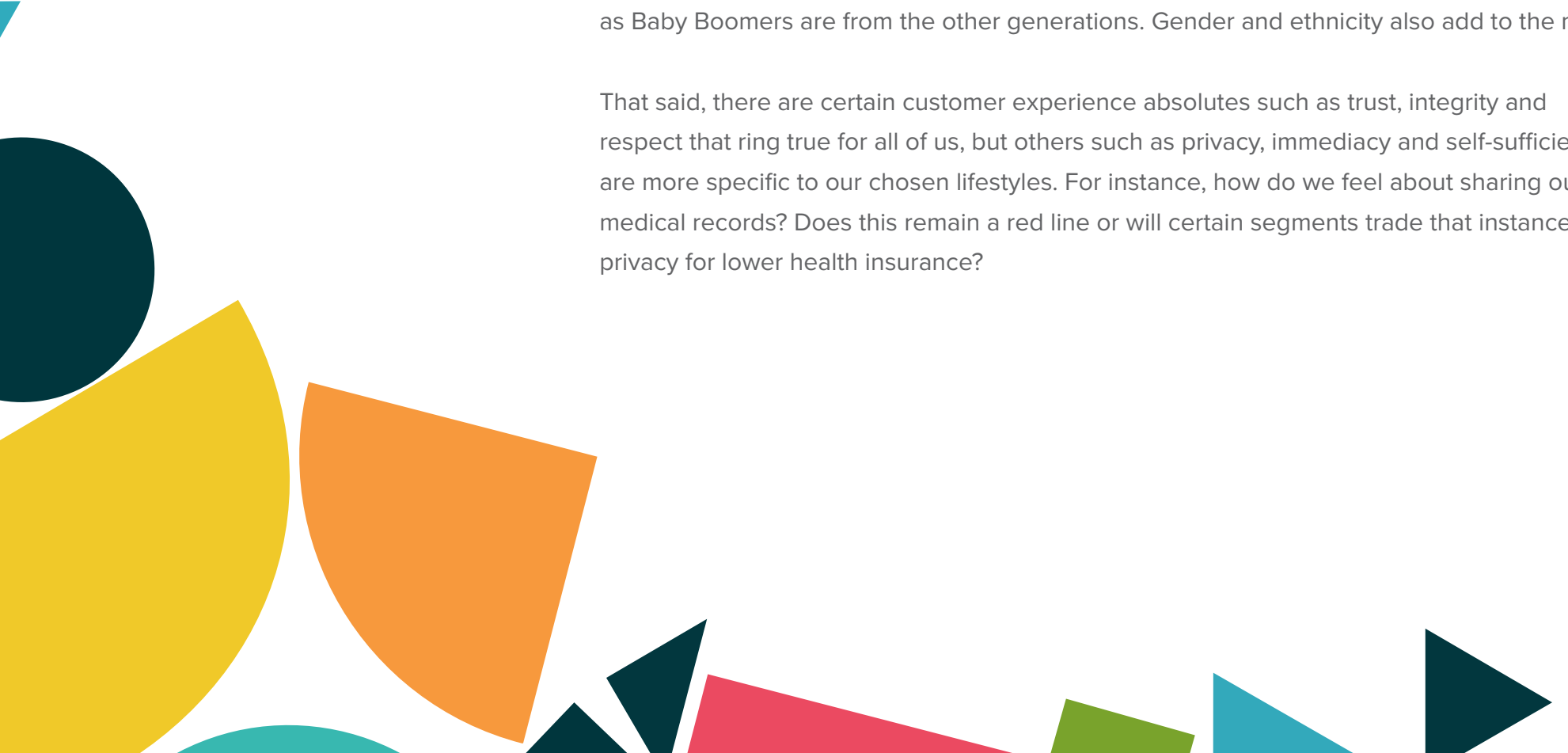
STAGE TWO

Tracking new customer behaviour

Assuming the outcome of stage one is to recognise that better ways of staying up to speed are needed; this is your first strategic discussion. The idea is to develop a better approach to track new customer behaviour.

The current and anticipated rate of technology-driven change affects everyone. We are constantly challenged with living our lives in new ways. Some we accept, some we reject. Generation Z behaves differently from Millennials, who in turn are distinct from Gen X, just as Baby Boomers are from the other generations. Gender and ethnicity also add to the mix.

That said, there are certain customer experience absolutes such as trust, integrity and respect that ring true for all of us, but others such as privacy, immediacy and self-sufficiency are more specific to our chosen lifestyles. For instance, how do we feel about sharing our medical records? Does this remain a red line or will certain segments trade that instance of privacy for lower health insurance?



So, having established the need to more carefully track these evolving behaviours, which trend's data do you need to start capturing that will inform you about how customers are changing? Here are a couple of public domain examples:

- Online and smartphone cultures have nurtured an obsession with immediacy. Amazon trialled its first drone delivery in Norfolk, UK. The result was a popcorn order being consumed within 30 minutes.
- The UK edition of **Deloitte's Global Mobile Consumer Survey** reflects our changing use of smartphones. In 2012, 96% used them for voice calls during an average week. This is no longer true for 31% of those sampled in 2016. Instead of voice, we prefer text.

Hopefully, it becomes clear that sifting through the vast amount of daily news needs proper organisation and resourcing to become effective. Here is the checklist that walks you through how to develop an effective customer profiling workflow.

Checklist:

1. Develop the ability to track how your customers are adopting digital behaviours
 - a. Collect public domain research
 - b. Augment gaps and test applicability with your own customer research
2. Turn it into actionable insights for prioritising new service investments
 - a. Incorporate the research into a narrative that explains the changes in your customer base and then group them by digital competency from 'conservative' to 'progressive'
 - b. Apply these insights to inform your service strategy e.g.
 - Should you be investing in a mobile service app?
 - Would enough customers respond to bot driven self-service?
 - Is there a demand for messaging based service?
3. Design it, goal it, resource it
 - a. Keep repeating the process of tracking changes in customer behaviour

STAGE THREE

Improving the quality of customer engagement

The next priority in your service strategy is to make sure that you are delivering a service experience that works for the customer. Here are some ideas to act as a context for this stage of your strategic debate:

- Quality assurance in contact centres is all too often focussed on priorities that customers don't really care about. On the other hand, customer experience is a journey towards new priorities. This can be summarised as the difference between Inside-Out and Outside-In mindsets. The former designs process maps, while the latter draws customer maps.
- In the complex world of customer expectation and omnichannel choice, customer journeys are most powerfully understood, redesigned and managed using the visual power of maps. They can be used to highlight what matters most in each journey from both the customer's and brand's perspectives.
- Outcomes can be tracked in terms of how customers score the organisation on effort, satisfaction or advocacy. Consistent points of failure can be transformed by making journeys smarter, simpler, faster or more empathetic – whatever matters to the customer.

“The process of mapping a customer journey allows you to get under the skin of what the customer is trying to do and really understand the distinguishing features of each journey”

- Sophisticated brands will be able to manage different versions of the same journey, for instance:
 - By offering a certain channel mix for a digitally ‘progressive’ customer and one that fits a more ‘conservative’ customer persona, as we discussed in stage two
 - By distinguishing between novice and expert users of certain journeys and offering more pop-up signposting and help for the novices and shortcuts for the experts
 - By plugging in more appropriate navigation such as visual IVR for smartphone users. This leverages the instinct for self-managed service options and provides more effective alternatives during peak times to cater to that ‘need it now’ mindset
- The process of mapping a customer journey allows you to get under the skin of what the customer is trying to do and really understand the distinctive features of each journey:
 - How does the emotional signature of an on-boarding journey compare with making a claim or a complaint?
 - What matters when checking your current account balance versus registering the death of a family member?
 - Expectations differ according to the task and situation that customers find themselves in. Visually mapping them helps make those needs explicit and easier to recognise.

Ask your team:

With all this in mind, now focus your group discussion onto these key questions:

- 1.** How do we get more value from journey mapping in customer service?
- 2.** How do we use it to identify what matters during each journey?
- 3.** Should we start to measure emotional impact?

STAGE FOUR

Optimising your engagement mix

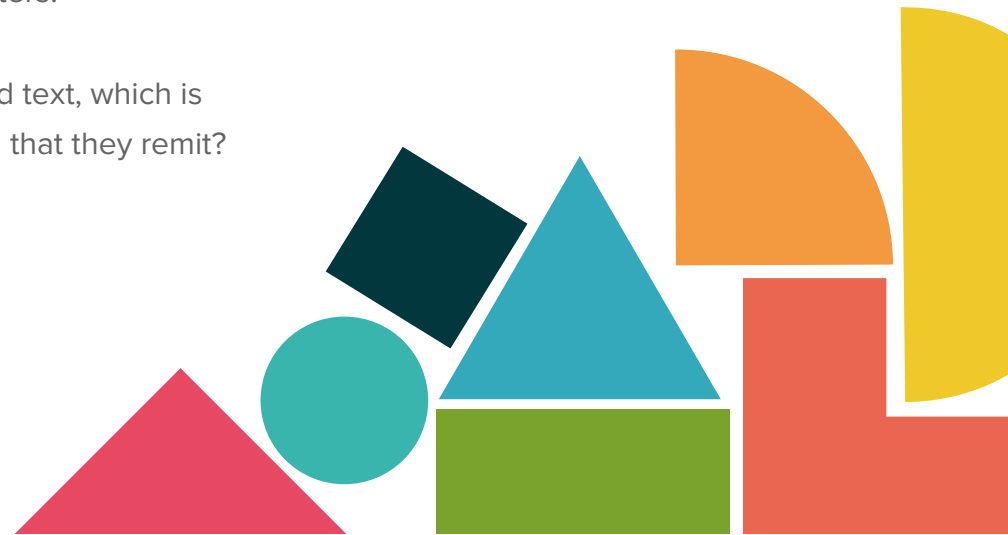
“Deciding whether to offer live assistance or self-service is so much easier once you really understand customer behaviour”

Stage three will have prepared everyone to understand that choosing the right channels and deciding whether to offer them as live assistance or self-service is so much easier once you really understand customer behaviour and the demands of key tasks within the key journeys. For instance, why might a bank use video chat? It could be that in the age of high street closures and the implied loss of face to face contact with your long-standing bank manager, video chat is the next best version of being face-to-face. In a like manner, situations that become emotional or complex are never going to be ideal candidates for self-service. Live assistance and human connection are what matters.

Between video, voice and text, which is the least desirable, given that they remit?

Text might be popular, but that doesn't make it an ideal candidate for calming down an argumentative customer. Emojis are never going to be as effective as voice or video in establishing empathy and rapport. There is simply less communication bandwidth in a textual form of communication.

However, live assistance is not always the answer, especially in today's 'I want it now' culture. Self-service has always been an obvious choice, but lack of discoverability and inadequate answers have often made this route less attractive to customers.



The recent arrival of intelligent assistance has changed this. It is now possible to provide multi-modal (speech and text listening and seeing) ways of engaging over multiple platforms (browser – messaging) and situations (desktop – mobile).

Sometimes, this can be designed with relatively simple conversational interfaces and capabilities, such as messaging-based bots; sometimes, with much more sophisticated learning capabilities (machine learning) and deeper integration with knowledge management and CRM to enable more valuable service outcomes.

Today's generation of self-service is already dramatically reducing the volume of live voice and chat sessions when human input adds negligible value. This

frees up advisors to undertake more rewarding and valuable customer engagement. It also changes the service business model by reducing costs to serve, as relatively less human resource is required.

In addition to live service and self-service is the often neglected topic of proactive service. The ability to meet a customer need before they realise it. This plays into the heartland of today's customer expectations for low-effort engagement.

The challenge for contact centres is that we are not traditionally orientated to think in this way. Ours has been a commitment to work harder not necessarily to work smarter. Proactive service needs a fresh mindset and dedicated resources to work. However arranged, on the following page is the key set of questions that need answering.

Ask your team:

1. How can you spot observable customer behaviour that is **consistently repeated over time**?

2. And then get involved **much earlier** in the engagement cycle?

Voice of the customer, machine learning, and good old-fashioned advisor and customer feedback session all help to spot these patterns.

Once you have fully explored these ideas, here is a set of guidelines to help you choose the optimal channel mix for a given customer task.

- The following is the optimum balance between live assistance and self-service:
 - Use live assistance when the interaction is emotional, complex or matters to the relationship
 - Offer self-service for non complex/emotional education, information and task completion, especially when access is expected 24x7
- Ideal use cases for voice are
 - When it's complex, e.g. when customers are feeling confused
 - When its emotional, e.g. when customer are feeling angry or nervous
 - When relationship building matters, e.g. at risk churn customers or counselling services
- Ideal use cases for text are
 - Explanations, e.g. how to do something
 - Simple advice, e.g. where to find something
 - Escalation, e.g. from self-service to live
- Ideal use cases for video are:
 - When trust matters, e.g. high-value sales and complaints
 - When face-to-face is being removed, e.g. branch closures
 - When differentiated service matters, e.g. VIP customers

Building the strategy

Given these guidelines, now focus your group discussions on these key questions:

- 1.** Are we using live assistance in the right way? How does this change our advisor profile?
- 2.** Have we allowed the customer to self-serve when expected? What parts of a journey can be handed over?
- 3.** Are we organised to identify proactive service opportunities? How do we goal it and resource it?
- 4.** What impact would this overall rebalancing of customer engagement have on our operating model for service?

In conclusion

We hope this eBook has provided enough detail to tempt you into having a go at service strategy or improve on what you already have. Of course, there are more topics that could be included, such as people and culture, technology and workflow being the obvious ones. But we have opted for short and sweet as being a better option.

If you do need help just ask. We are always ready to help and offer our expertise. We wish you great success with your service strategy. Reach out to us here:

Brainfood Consulting

Zendesk

Want to see a demo of how Zendesk can help with a building a great strategy?

[Click here!](#)