



A SYKES E-BOOK

Intelligent CX: Creating the Right Experience in Every Moment



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Introduction

A Cycle of Disruption and Evolution

Since the early days of “Web 2.0,” digital strategies in business have been in a cycle of disruption and evolution. The Internet tore down the old media model of TV, print and radio ads as the sole distribution channels. It gave birth to digital distribution, along with multichannel and omnichannel approaches to customer experience.

With a multichannel approach, brands were eager to get their messages out on as many channels as possible as the customer journey became less linear. If companies couldn't accurately predict where customers would engage, they would blanket as many channels as possible to ensure that they would eventually reach that customer.

However, maintaining and managing the various channels became too challenging for many organizations to handle in-house, so brands used outside vendors to take on those responsibilities. Forming external partnerships presented a unique set of problems, though, as there was little connectivity between vendors. The partnerships achieved brand presence, but not cohesive messaging and experience.

As customer expectations became more focused on channel interconnectivity and higher-quality interactions, multichannel gave way to omnichannel. Omnichannel's goal was to be everywhere the customer wanted to be and to connect the various brand interactions into a cohesive experience.

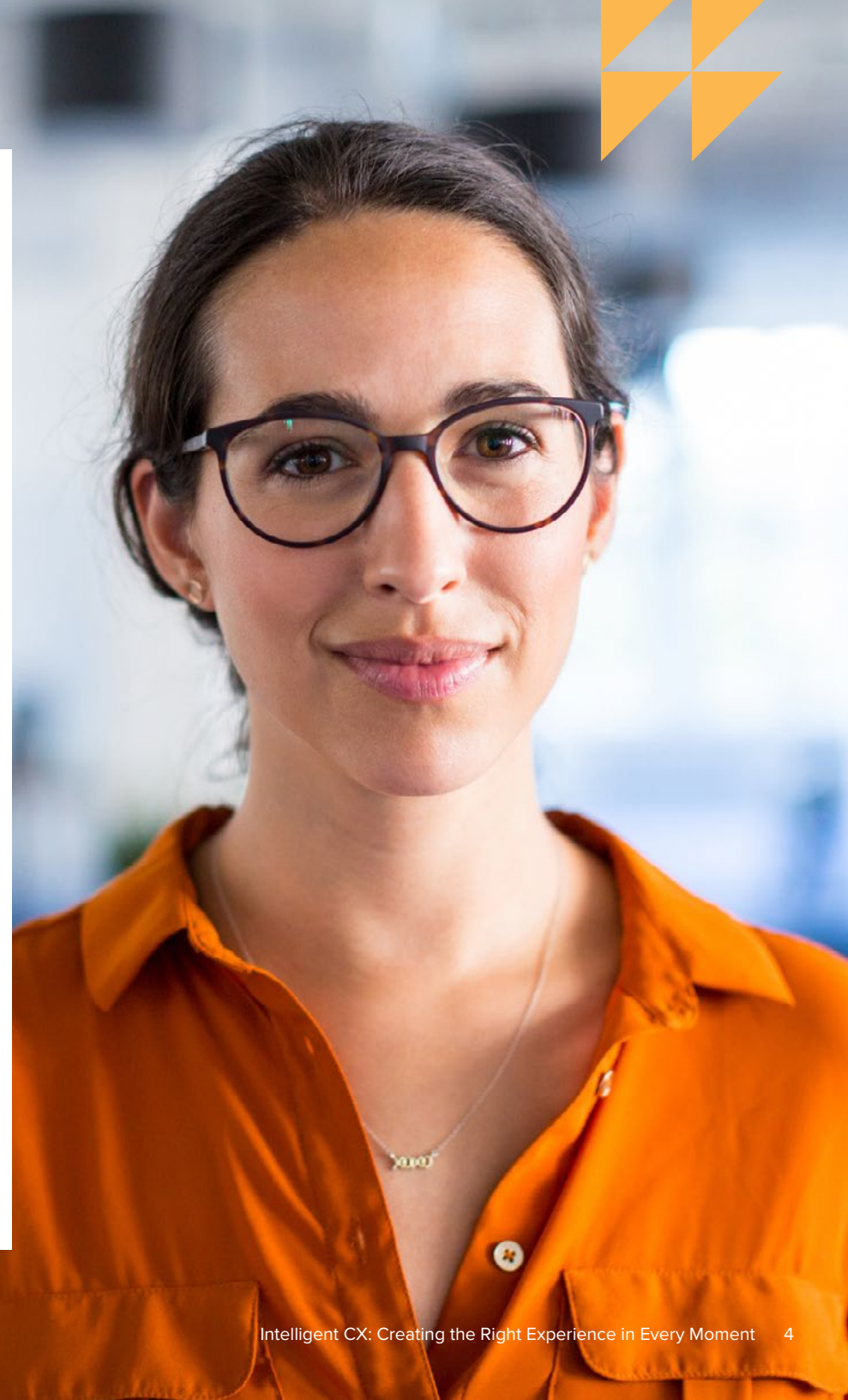
Omnichannel focused on delighting the customer with messaging that felt personal and consistent. It finally delivered the connection between touchpoints that multichannel lacked. However, it was a reactive process that relied on post-interaction analyses — rather than listening to customers. Businesses need a way to proactively anticipate customer needs and deliver the right experience for the individual.

Intelligent CX — Beyond Omnichannel

Omnichannel is now undergoing the disruption cycle. New knowledge and technologies usher in the next evolution of customer experience. **What emerges is an “omni-digital” approach called “Intelligent CX.”** This method focuses more on understanding the experience than merely connecting the channels.

Intelligent CX strikes a balance between personalization and efficiency. **The ultimate goal is to reduce customer effort, which is a [leading factor](#) in building customer loyalty.** It relies on data to understand the intent of the customer at each touchpoint, journey mapping to find the most effortless path to each touchpoint’s goal, automation to increase efficiency and accuracy, and a properly trained workforce to provide customers connected, personalized experiences at the right moments.

In this book, we will explore SYKES’ application of Intelligent CX, and show you how you can use this approach to become an efficient, experience-led organization and grow unparalleled customer loyalty.





Chapter One:

The SYKES Approach to Intelligent CX

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SYKES' purpose-driven strategy of “helping people, one caring interaction at a time” has enabled the organization to become an industry leader in providing the highest-quality customer interactions. With highly-evolved and rapidly-shifting customer expectations, SYKES stays ahead of the consumer trends curve to continue delivering compassionate engagements on behalf of its brand partners.

SYKES' new approach focuses on understanding and respecting the needs of the customer and providing them with an experience that exceeds their expectations. This understanding could mean deep and engaging interactions with live agents. It could mean agent-free online sales or support experiences. It could also mean respecting the customer's time and using automation and other digital tools to reduce the number of interactions to a minimum.



With the goal of understanding and tailoring experiences for diverse customer needs, SYKES has made a series of strategic acquisitions and investments over the past 10 years. These include:

- **Alpine Access (2012)**: Pioneer in home-based customer care
- **TalentSprout (2012)**: Expert in learning and talent development services
- **Qelp (2015)**: Innovator of digital self-service software and content optimization
- **Clearlink (2016)**: Leader in digital marketing and sales, specializing in data science, personalized online experiences and customer acquisition
- **XSELL Technologies (2017)**: Visionary of machine-learning platforms to provide sales agents with real-time support
- **Symphony Ventures (2018)**: Trailblazer of robotic process automation and other digital operations through global consulting, implementation and managed service

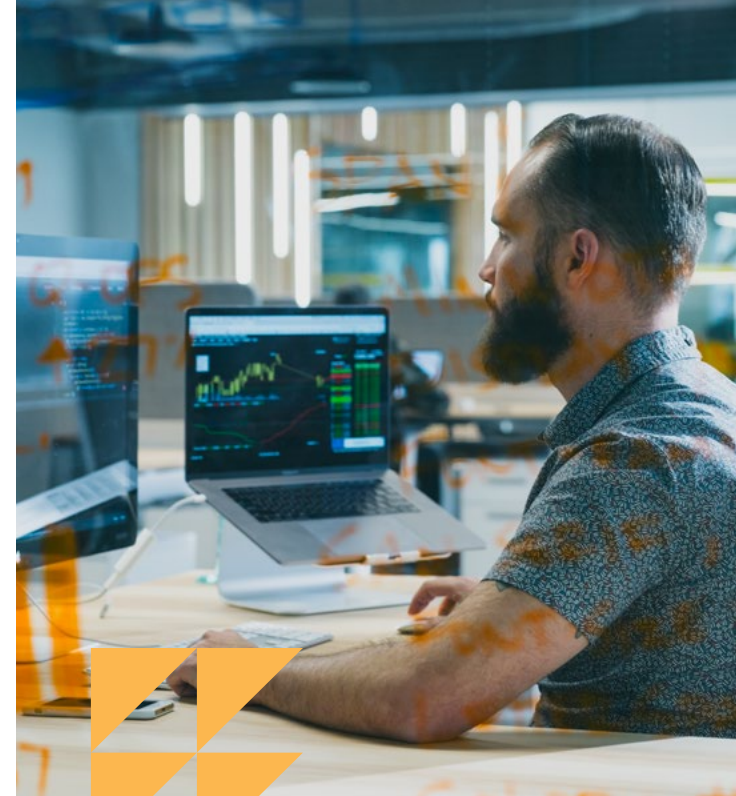
By intentionally combining and leveraging the expertise of these companies, alongside SYKES' foundational customer experience-center capabilities, the SYKES family of brands provides the people, technology and data needed to apply an Intelligent CX process to any or all parts of the customer journey.

In the SYKES customer journey, digital marketing, sales, support and customer retention are augmented with automation at appropriate points for increased speed and accuracy. By bringing these capabilities under one umbrella, it eliminates silos that often exist between various business units. The holistic approach to the customer journey allows the journey itself to take center stage, rather than the touchpoints.

We'll breakdown how this process works in practice in a bit; but first, it's necessary to lay the foundation on which Intelligent CX builds: data.

Start With a Foundation of Data

As previously mentioned, the issue with a multichannel approach is that adding channels increases opportunities for inconsistencies across voice, messaging and experience delivery. While experience scores for individual touchpoints may be strong, ratings for the complete journey can suffer. An experience-led organization focuses on the connections between touchpoints to deliver the most effortless journey for the customer. Creating those connections and streamlining experiences requires accessible data, which is where many brands fall short.



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Intelligent CX uses an encrypted data repository capable of ingesting data from any internal or external input. This capability means brand partners can benefit from their own data sources, as well as sources from across the SYKES organization. **SYKES uses its suite of CX data management services to collect, connect and contextualize information of a customer's journey and predict the best path to the next touchpoint.**

Accessing the data is achieved through application programming interfaces (APIs) from applications for each department. For example, when routing a customer's call to a sales agent, the interactive voice response (IVR) API pings the data repository to find information connected to the customer's phone number. If the customer used that phone number to populate an online order form, it triggers a priority status for the call, showing high intent to purchase. The agent then knows that the customer came from an online shopping cart and knows which product or service the customer is considering. The call or chat could pick up right where the online experience left off.



SYKES has a data advantage over other companies, primarily due to the high volume of customer conversations that flow through its customer experience centers. A recent [HFS Research report](#) identified this advantage:

“[Companies need to] make the contact center the strategic hub of their business in order to listen better to the voice of the customer and cater to their needs.”

- Melissa O'Brien, HFS Research

SYKES has agents handling millions of calls and chats focused on sales, support and retention every year. Such consumer touchpoints provide first-hand data inputs from which SYKES can identify trends and opportunities to improve the customer experience. This includes examining data from the website clickstream, marketing analytics, IVR, call flows, chat logs and post-contact surveys to understand the types of interactions customers prefer. Keeping efficiency at the forefront, SYKES looks at data gathered at each stage to reduce friction within — and between — them.

Ways SYKES' Data Can Improve the Stages in the Customer Journey:



- **Marketing:** Phone and chat data can help identify key customer terms to optimize SEO and PPC. Understanding the features and benefits relevant to customers informs campaign messaging effectively.



- **Sales:** Aggregating data from successful sales interactions helps identify replicable patterns for future customers. Comparative analyses reveal conversion rates for various packages and products.



- **Support:** Frequently asked questions and common issues that arise from customer experience-center data can inform and optimize online self-service content. Known issues can be passed on to the product department for updates and bug fixes.



- **Retention:** By understanding implicit and explicit intent signals that lead to churn, proactive steps can be taken to prevent customers with a high propensity to cancel from abandoning the brand. For customers coming to the end of a contract, personalized renewal offers can be created based on what matters most to that customer.

CASE STUDY

SYKES' End-to-End Solution Helps a Travel-Booking Giant's CX Soar

[View Case Study >](#)





With this solid data foundation in place, SYKES can begin to implement the Intelligent CX process for its brand partners across their various customer-journey touchpoints.

Focus on Reducing Effort

The goal of Intelligent CX is to provide the most effortless path for customers to complete a task. Personalization still plays a role, but Intelligent CX's main tenet is that reducing the number of necessary interactions or keeping to fast interactions is best.

This approach contradicts the prevailing omnichannel theory that customers want to be “wowed” at every turn. While personalization has been shown to improve customer satisfaction (CSAT) and Net Promoter Score® (NPS®), it does little to encourage customer loyalty. **When it comes to earning customers' business for the long-term, companies that reduce customer effort come out on top.**

Net Promoter, Net Promoter Score and NPS are registered trademarks of Bain & Company, Inc., Satmetrix Systems, Inc., and Fred Reichheld.



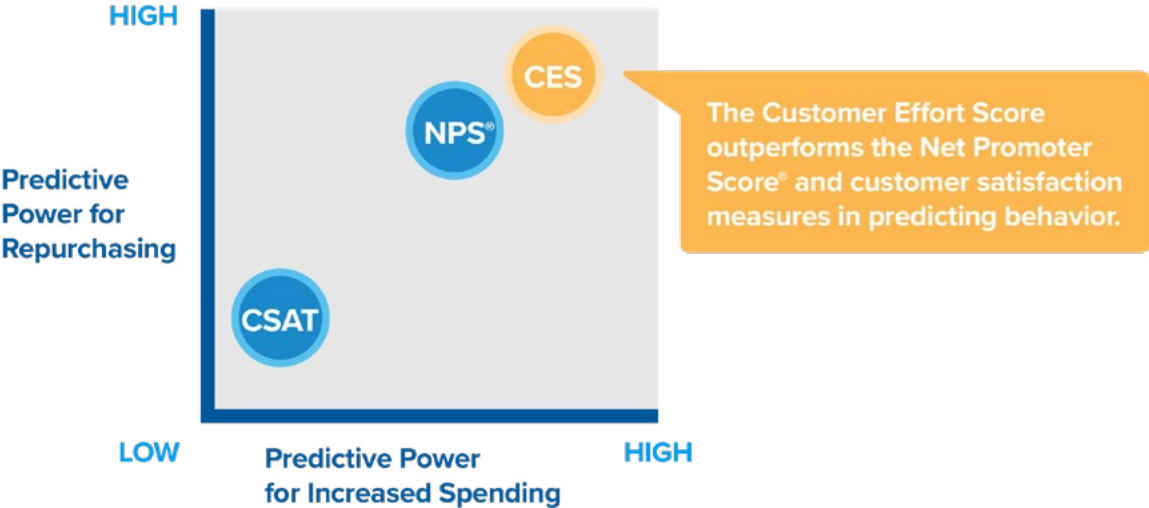
In 2010, the [Harvard Business Review](#) unveiled a metric called the Customer Effort Score (CES), which asked a single 1-10 scale question, “How much effort did you personally have to put forth to handle your request?”

The survey polled 75,000 B2C and B2B customers about recent service interactions across common digital and voice channels, including live phone calls, voice prompts, web, chat and email. The results revealed two key findings: “First, delighting customers doesn’t build loyalty; reducing their effort — the work they must do to get their problem solved — does. Second, acting deliberately on this insight can help improve customer service, reduce customer service costs, and decrease customer churn.”

Mapping the CES against CSAT and NPS® showed a significant improvement in predicting whether a customer would “keep doing business with the company, increase overall spend or spread positive (and not negative) word of mouth.”

“Delighting customers doesn’t build loyalty; reducing their effort — the work they must do to get their problem solved — does.”

- Harvard Business Review



As of 2018, the preferred method of measuring CES is by asking a single question and scoring the response on a scale from 1 to 7, with 7 being the highest level of agreement with the statement “The company made it easy for me to handle my issue.” This is a simplified way to measure effort, but the change in measurement did not change the results. The book [The Effortless Experience](#) states that, “96% of customers with a high-effort service interaction become more disloyal compared to just 9% who have a low-effort experience. Disloyal customers are likely to cost the company more — they spread negative word of mouth and cease future purchases.”

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- *The Effortless Experience*, Matthew Dixon, Nick Toman and Rick DeLisi

With this in mind, let’s examine how to use the tools at your disposal to begin reducing the effort in your customer interactions.

CASE STUDY

SYKES Cuts Leading Telecom’s Customer Support Calls by 20% With Intelligent CX

[View Case Study >](#)





Chapter Two:

Intelligent CX Step-by-Step



Chapter Two: Intelligent CX Step-by-Step

To provide the customer with the most efficient path through their journey, implement Intelligent CX using the following steps. Apply them at the macro- and micro-levels, in separate components or — ideally — all together.

1. Map the Customer Journey

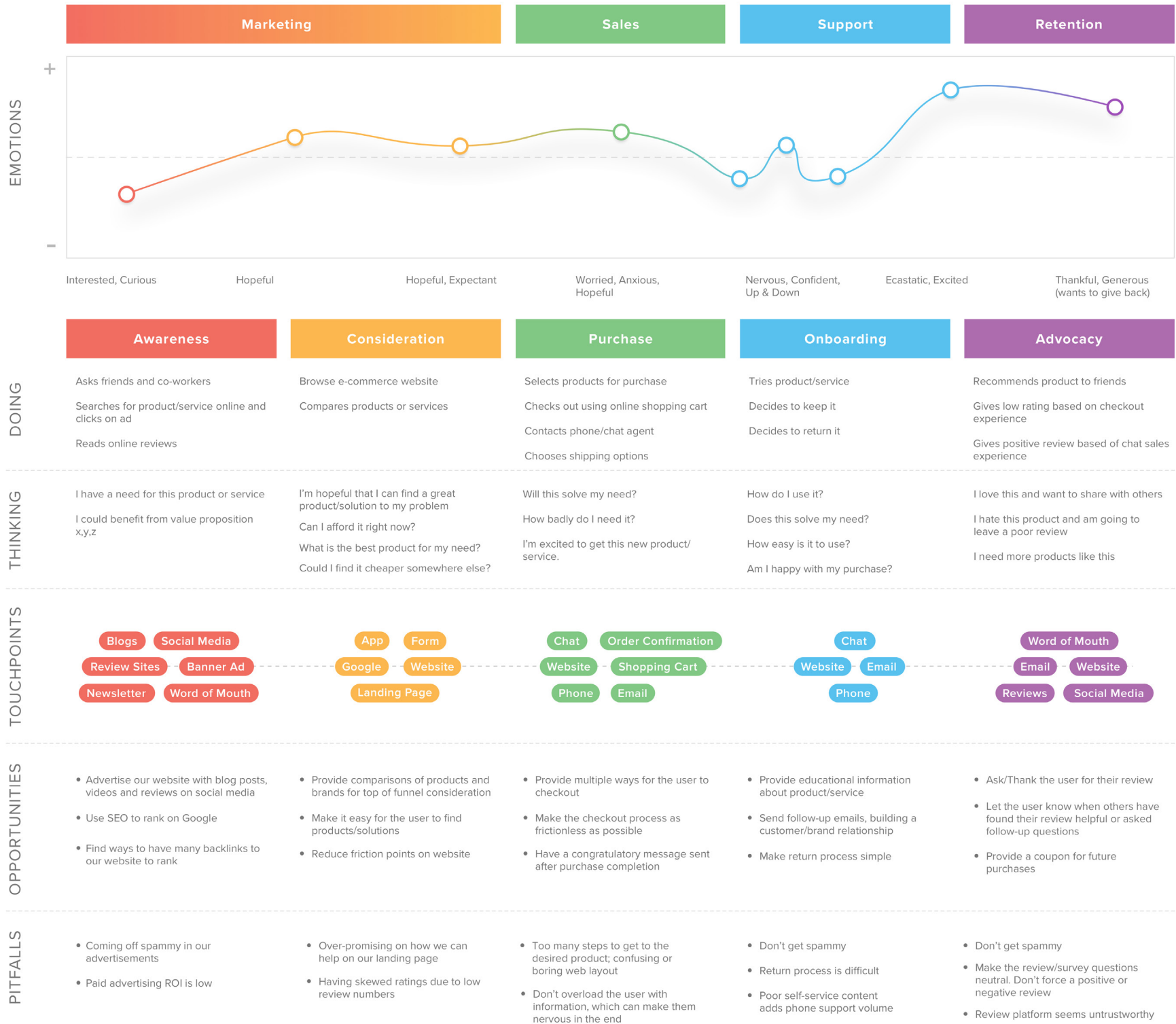
Mapping a customer journey can be a complex exercise, but one that is vital to gaining a better understanding of how customers are interacting with your brand. Instinct is enticing to trust, but data won't lie.

Separate the customer journey into stages — e.g., marketing, sales, support or retention — and align them with a common goal. An Intelligent CX journey map intends to deliver the most effortless experience possible, which provides clear direction on restructuring your touchpoints in each stage.

[Hubspot](#) has a helpful article for creating a journey map that provides a more detailed walkthrough of this process. There are several examples based on the type of business you're in, as journeys will vary by industry or product.



Customer Journey Map Example



2. Understand the Customer Objective by Stage

At each stage of the journey, examine the customer's goals within them. The design thinking method of generating a [user story](#) is a useful exercise. User stories can be summarized by the following statement, "As a (user), I want to do (this) to achieve (that)."

USER STORY FORMAT

"As a (user), I want to do (this) to achieve (that)."

Look at the stages identified in the journey map, apply the user story statement to each stage, then determine the most effortless way to achieve that statement. Examine whether the user story is to complete a task or to gain a deeper understanding through personal interaction.

3. Determine if Personal Interactions are Beneficial

Depending on the customer's objectives identified, ask, "Can the user's objective be met by not engaging with a live agent?" If the answer is no, then use data and technology to make the interaction as personalized and rich in value as possible. A few examples include:



Online-to-Offline Data Passing: Clickstream data about the customer's online experience transfers to the offline world to dynamically change IVR messaging and agent call flows.



Intelligent Call Routing: This routing type uses data associated with the customer's phone number to route the call to an agent with the highest likelihood of providing the best experience.



Personalized Offers: The technology uses customer data — alongside predictive lifetime value estimates — to tailor offers specific to each customer. Those offers are passed to the agent in real-time to give them the most relevant product information, as well as a powerful customer acquisition tool.



If the objective can be reached without interaction, examine which process can help achieve that goal. Processes can include utilizing an online ordering system, online self-service content or intelligent automation like chatbots.

Some examples of this type of augmentation include:



Knowledge Bots: These bots comb through knowledge bases for agents, instantly delivering the answer to customer questions.



Robotic Desktop Automation (RDA): Intelligent bots perform repetitive data entry tasks for agents, freeing agents to better personalize the experience without sacrificing speed or quality.



AI-Assisted Chat: Conversation data from past interactions is analyzed, aggregated and used to inform chatbots. These chatbots follow along with the agent's conversations and suggest the best responses based on historical data.

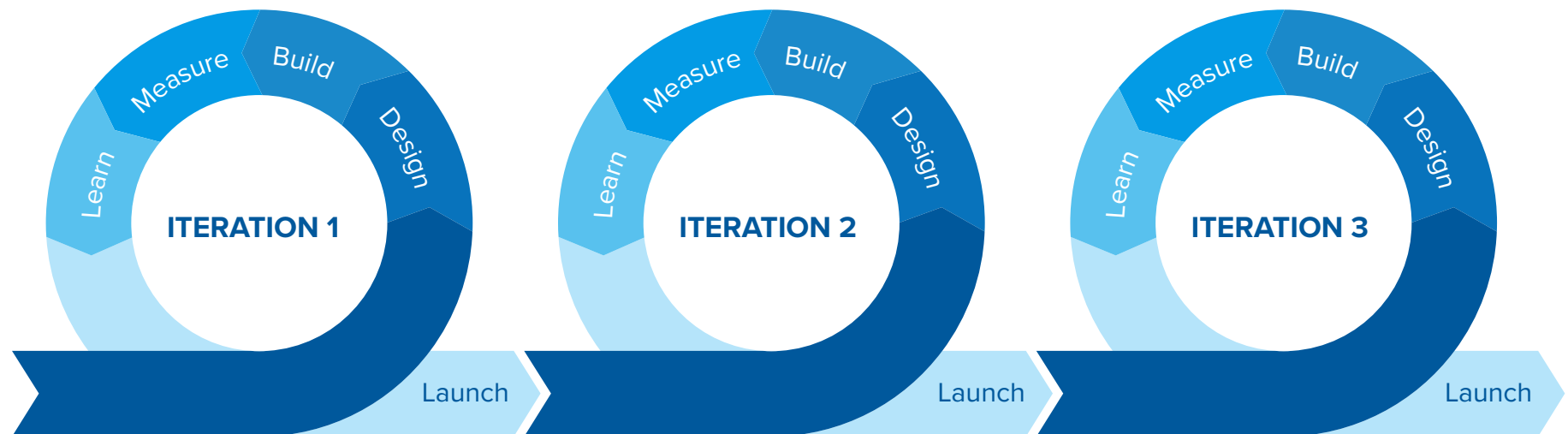
Once you reach the objective, it's time to begin the optimization process.



4. Collect the Outcome Data and Optimize Future Interactions

Feedback loop optimization is vital to Intelligent CX. At this stage, measure the outcome data from the various stages against the user stories developed in Step 2. Did the process address the goal of the journey map?

Identify areas for improvement, implement changes and continually reexamine. Following this methodology allows the process to adapt to customer behavior as it changes.



With the step-by-step outline in place, let's look at how using automation can help make your Intelligent CX faster and more accurate.



Chapter Three:

The Intelligent CX Workforce

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When it comes to the people in your workforce, they can both implement the Intelligent CX process and benefit from it.

On the implementation side, employees must understand the goals of Intelligent CX. Implementing it also involves hiring people from the onset who see the value in effortless interactions from personal experience. It means training them on the inner-workings of the Intelligent CX approach, and giving them the technology and tools needed to deliver on the promise of Intelligent CX.

SYKES recruits new hires that have well-rounded experience in the digital customer experience.

Internally, there is a priority for cross-departmental communication at SYKES. With the internal teams focused on creating the most effortless experience throughout the journey, there is a focus to not only solve the problem at hand but also head off problems that may arise in the future. **Seamlessly passing data between departments ensures that teams get a holistic picture of what others are doing and can approach problems with that context in mind.**

Examples of Questions Teams Ask to Connect the Different Stages Include:

- **Marketing-to-Sales:** Do visitors of one blog post or landing page convert at a higher rate?
- **Sales-to-Support:** Do customers always ask the support team the same question about a particular product?
- **Marketing-to-Support:** Did support inquiries fall right after adding customer-care content?
- **Retention-to-Sales:** Do certain products have a lower churn rate? Which products are most useful to offer as incentives for re-enlistment?

These questions can lead to changes in processes that benefit the customer directly, but when employee effort is reduced, the customer benefits there, too. One of SYKES' tech brand partners saw this in action recently.

CASE STUDY

SYKES Improves Customer & Agent Experience for a Major Business Tech Brand

[View Case Study >](#)

Agents interact with AI that uses conversation data from thousands of interactions and natural-language processing to create a virtual customer.



SYKES has also integrated components of Intelligent CX in brand-advocate processes and touchpoints from onboarding through training and operations. Specifically, agents interact with AI that uses conversation data from thousands of interactions and natural-language processing to create a virtual customer. Think Apple’s Siri or Amazon’s Alexa programmed to be a customer. The AI gives the agent a more realistically simulated experience of the real-world customer experience center. The capabilities of this AI-augmented training have reduced the need for roleplaying or live-training scenarios, which are unrealistic and less useful. This approach has seen a 4x increase in speed at which new hires are ready to field real calls with similar or better results than traditional classroom training.

If a brand advocate struggles to master a process or skill, SYKES applies Intelligent CX to on-the-job training. **Rather than pulling agents off the phones to attend generic classroom instruction, the struggling agent receives a five-minute, personalized micro-training, delivered directly to the brand advocate on an “as needed” basis.** These types of courses are completed between calls, offering the agent the chance to improve without disrupting their schedule. This approach means compliance issues are detected and handled early and constructively, improving the advocate’s experience at work. This ultimately translates to a better experience for the customer, as a brand advocate that feels supported and happy in their role is more likely to bring that positive attitude to the calls or chats they handle.

Respecting the employee experience sets the tone for the high expectations that SYKES brand advocates bring to customers. The company practices what it teaches.

Conclusion

Disruption and evolution remain constant business considerations to the customer experience. **The move from multichannel to omnichannel to Intelligent CX is the next chapter in the way leading brands frame the relationship with their customers.** Through the tactics and strategies outlined in this book, organizations can make the necessary changes to help customers in the most efficient way possible, earning long-term buyers and advocates. The future of CX is full of exciting possibilities for companies willing to move beyond a channel focus and into an experience-focused approach.

SYKES is proud to lead the way for its brand partners and offer them the first service offering of its kind: a holistic customer experience. With the capabilities of the SYKES family of brands, our partners can now choose which areas of the customer journey they wish to optimize, knowing they have a partner that can deliver the effortless experiences that foster long-term loyalty.

No matter where your organization is in its transformation to an experience-led business, SYKES can be the partner that helps you reach your goals.



Sykes Enterprises, Incorporated is a leading provider of multichannel demand generation and customer engagement services for Global 2000 companies and their end customers. SYKES' differentiated full lifecycle solutions and services — digital marketing, sales expertise, customer service, technical support and more through multichannel delivery platforms — effectively engage customers at every touchpoint of the customer journey. Our complete service offering helps clients acquire, retain and increase the lifetime value of their customer relationships through cost-effective solutions that enhance the customer service experience, promote stronger brand loyalty and foster high levels of performance and profitability.

Learn more at sykes.com/notjustalltalk.

