# personalizing
## customer experience
seven barriers and how to break through

## BRIGHT PAT•TERN

**Ted Hunting, Senior Vice President of Marketing at Bright Pattern**

Hunting has over 25 years of experience successfully building brand and demand generation programs in start-up and global companies creating revenue growth and market leadership. Hunting is a recognized speaker in the CX industry with keynotes and presentations at top conferences including Gartner, Forrester, IQPC Customer Contact Week, ICMI, Enterprise Connect and Execs in The Know. He is also a recent CCW Advisory board member.

# introduction

In an increasingly digital world, when it comes to customer experience (CX), companies want to become modern digital businesses that personalize CX much like mom-and-pop companies of the past.

As I was preparing a presentation for a New York City Forrester event on customer experience, I reached out to my son, who had worked at disruptive companies like Dropbox and Lyft, for a younger perspective on the future of customer experience. I expected he would talk about virtual and augmented reality or the Internet of Things, but what he said instead surprised me.

His first words were, "Make it the usual, Betty." He was referring to the need for digital interactions to be like they were in the '50s though he wasn't even alive in the '50s. He mentioned that CX needs to be as personalized as in the past when you walked into a diner and asked Betty for the usual. He mentioned his favorite coffee spot in San Francisco. When he walks in every morning, they know he is a regular, they call him out at the back of the line, direct him to the front (personalized routing), and greet him personally with "Hey, Andrew, the usual?" It's exactly the kind of experience I remember as a kid, going into my grandparents' local hardware store.

The future of customer experience is all about personalization, but with all the existing technology, why is it not happening? Dimension Data states that the next wave of customer experience after omnichannel experiences is personalized and predictive service. Let's look at seven barriers to personalization along with some ideas for breaking through each barrier.

## 7 BARRIERS TO PERSONALIZATION:

1. Lack of Omnichannel
2. Siloed Systems
3. Lack of Real-Time Customer Data
4. Lack of Personalized Business Rules and Approaches
5. Lack of Automation and AI
6. Organizational Issues
7. Personal Data and Privacy

# breaking through the barrier for personalized cx
## barrier one: lack of omnichannel

The first barrier to personalization is the lack of omnichannel customer experiences. Omnichannel was originally a retail term and it referred to a single, continuous conversation across all channels, including digital and physical channels. Dimension Data, Gartner, and IQPC report that only 8–20% of companies today offer an omnichannel experience. Additionally, a recent study we commissioned at Bright Pattern in August 2019 found the figure to be 20%.

Most companies today are able to communicate with customers in a multichannel manner, over channels such as voice, email, chat, text message, mobile apps, and IVRs. And more innovative companies are also adding to the mix, emerging channels, such as bots, asynchronous messaging, and messengers like Facebook Messengers. Forrester reports that the average number of channels in customer experience today will increase from 9 to 11, yet most companies are multichannel, as the communications in each channel are independent and require all information to be repeated again when the customer enters via another channel.

**Contrast that to a full omnichannel experience that is both personal and low effort:**

A customer is chatting on a website with a bot about a new TV for the upcoming football season. The bot provides some help and when the chat escalates to an agent, the agent knows the full context of the bot conversation and greets the customer personally to continue the conversation. Later, the customer calls the company and rather than being greeted by an impersonal IVR asking her what language she speaks, the system says, "Julie, you were last chatting with us about a new TV. Would you like to be routed to a TV specialist?" And later when she is ready to buy, she texts the company and the company knows who she is and sends her a Google map to the closest store with directions. When she enters the store, an iBeacon notes her cell phone, identifies who she is, and an associate in the store with a TV skill set greets her personally at the store. That is a full omnichannel experience that is personal and easy across every channel from voice to digital and even in store. It's possible today. Barrier 1 is the lack of omnichannel customer experiences, which leads me directly to barrier 2.

## 20%
of companies offer omnichannel

# breaking through the barrier for personalized cx
## barrier two: siloed systems

Customers have been clamoring for omnichannel for years, yet only 20% of companies currently offer omnichannel conversations. The primary reason is that companies have built siloed systems piecemeal, which has led to impersonal siloed communications. Most companies have added each channel as a separate, disparate system.

One major hotel chain I recently spoke with indicated that the company is moving to omnichannel, but agents currently have 11 desktop applications for their channels! Agents can barely navigate their desktop, let alone navigate a personal conversation with each customer. If a company has an integrated omnichannel platform, the agents can have a single unified omnichannel desktop that lets them see every interaction from every channel. This allows them to respond personally to any interaction, regardless of channel. A platform approach to unifying all channels and conversations is the key enabler to reducing friction, improving personalization, and breaking through the first couple barriers, which leads me to barrier 3.

nearly **60%** of companies use two or more systems to manage channels in their contact center

| one system | two systems | three systems | + |
|---|---|---|---|
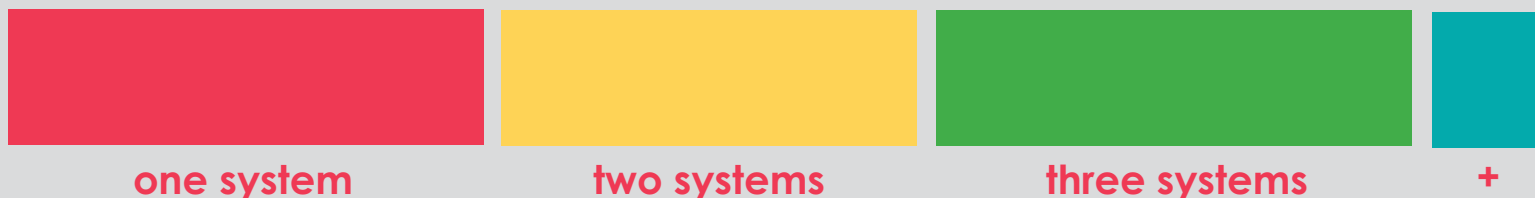
# breaking through the barrier for personalized cx
## barrier three: lack of real-time customer data

Just as customer experience systems for communicating are typically fragmented by channel, the underlying customer data is often locked away in separate databases and customer relationship systems (CRMs). This customer data is a prerequisite for a personalized customer experience and needs to be seamlessly connected to the omnichannel customer experience platform so agents can understand the customer and "act personally in the moment."

Real-time data is a key enabler of personalization. Knowing who the customer is, whether they are a "gold customer," and any previous interactions in the customer journey, are all funda-mental pieces of customer information an agent needs in order to offer a personalized experience. Real-time APIs connecting disparate databases and CRMs to the customer experience platform allow this barrier to be broken, which leads me to barrier 4.

Customer data must be coupled with business rules and innovative customer experience approaches. For example, with a simple routing rule in an omnichannel customer experience platform, gold customers can be routed to "gold agents" or as one of the most innovative healthcare providers does, to the member's "healthcare concierge." If a customer is spending a lot of time on a website, a business rule can be turned on in the customer experience platform to proactively offer a chat. Additionally, if a customer calls, texts, or chats with the company, the customer experience platform can even match the customer to a compatible agent based on sentiment (i.e., satisfied, neutral, unhappy), if sentiment analysis is turned on to evaluate a customer's general satisfaction, so that the customer's needs are met by an agent skilled to handle them.

These business rules require innovative approaches as part of personalizing the customer experience. I recently heard the head of customer experience at BaubleBar, an innovative online fashion accessory company, talk about personalization. On the company's website, different channels are offered, allowing customers to connect and get advice via email, chat, or even video chat so you can have an associate hold up earrings to see them on a live person versus in a static photo. Talk about innovative and personal yet digital! Gartner and other analysts claim that video chat has reached a tipping point and it provides an innovative channel for personalized customer experiences.

Another personalized approach involves biometrics. Today it is with a voice but in the future it may come from an embedded chip, or you name it. Call up most companies and the first thing they typically ask you is, "Name, rank, and serial number?" as if you are going to customer experience jail. But with new technology like voice biometrics, a company can, with near certainty, identify and authenticate you using just your voice. So instead of a high-friction, impersonal question, you can instead hear, "Hi Julie, great to have you back as a gold customer. How can we help?"

Business rules need to be easily turned on and configured in a manner that is nimble. This requires automation. During yearly sign-ups for health insurance, for example, a healthcare insurance provider may decide to hire more agents for chat to handle a spike in inquiries, much like a retailer during a Black Friday sale. The customer experience platform provides the ability to easily configure and orchestrate a personalized customer experience by nimbly changing business rules based on business conditions. Ideally, business users can make the changes versus having to have it built rigidly by an IT or professional services team.

Automation now has a new face beyond automated business rules. AI can automatically help customers personally with bots and can also help agents to be more personal. When a customer asks about a TV, AI can provide suggested personalized responses to the agent via knowledge base. Similarly AI can detect sentiment and if sentiment is poor, that interaction can be automatically monitored, detected, and routed to an agent with a "retention specialist" skill set. AI can also detect keywords such as "cancel service" or profanity in real-time over voice or digital channels (e.g., email, chat, text messages) and similarly route them to the best person to salvage what would otherwise be a poor customer experience.

# breaking through the barrier for personalized cx
## barrier six: organizational issues

We discussed previously siloed channels and the need to break through silos with omnichannel. But silos can exist beyond channels. Organizational silos are one reason customer journeys are impersonal. When the Marketing team "owns" the company mobile app, the Sales team owns the website, and Customer Service owns the phone line and email, it's no surprise that customers are treated impersonally by each organizational silo.

A retired customer experience officer of a leading pet retailer told me how each board meeting began with a discussion on customer experience being the first priority and the existing issues from each organization were shared. It was effectively a "CX intervention" for surfacing customer experience issues from different teams within the company. This company was a poster child for a company that truly put the customer experience first with a top-down mandate from the CEO that the customer experience comes first. Customer experience is now a top-three spending priority of CEOs but in addition to technology and spending, it starts with people and a culture that is focused on the customer experience.

" The most important thing we are doing here is collapsing the silos. When we think about a program, we don't think about IT and finance and commercial operations. We think about how the program improves our customer or employee experience. "

—Eash Sundaram, EVP of innovation and CIO of JetBlue

The final and most volatile barrier that needs to be broken involves privacy. To better personalize the customer experience, companies need personal information, and increasingly, customers must "opt in" and agree to provide this information. Companies can take an approach where they communicate to customers the benefits of providing their information versus just asking for it. For instance, when someone visits the website or calls in, the company could automatically ask their name and mention it is so they can offer an easier, more personal customer experience. By taking this "give to get" approach, companies can explain why they are asking for personal data and communicate the benefit to customers. All too often today, companies ask for personal data but it goes into a black hole and customers are unsure how their information will be used.

Companies also need to be careful not to be "overly personal." By relaying too much personal information, a company can come off as a stalker. Or as Gartner advised at a recent Gartner Symposium: get personal, but don't be creepy.

In addition, companies should consider balancing personalization with customer opt-ins as well as legal privacy regulations such as HIPAA, GDPR, and PCI compliance. In a world where people are afraid to reveal personal data, privacy of data is one of the most difficult barriers to overcome.

# final thoughts

The nexus of big data, omnichannel customer communication, and organizational commitment will together ignite a new world of effortless and personal customer experience. The inevitable coming wave of personalization is finally making it to shore.

The wave of personalization won't come easily but will require companies with vision to hit the personalization target on the horizon. Companies will need to take a visionary approach and analyze past journeys to identify siloed and impersonal interactions that create friction. Based on impersonal journeys of the past, companies can understand the "bumps in the road" and then smooth out the journey to make them easier and more personal.

As part of orchestrating new journeys, companies should start with the customer first and architect personalized journeys based on what the customer wants. This creates great "outside-in journeys" based on what customers want.

Ready to get started? Looking to provide an effortless, personal customer experience with an innovative omnichannel contact center solution that is easy to turn on and low cost? Bright Pattern can show you what's possible in a personalized demo.
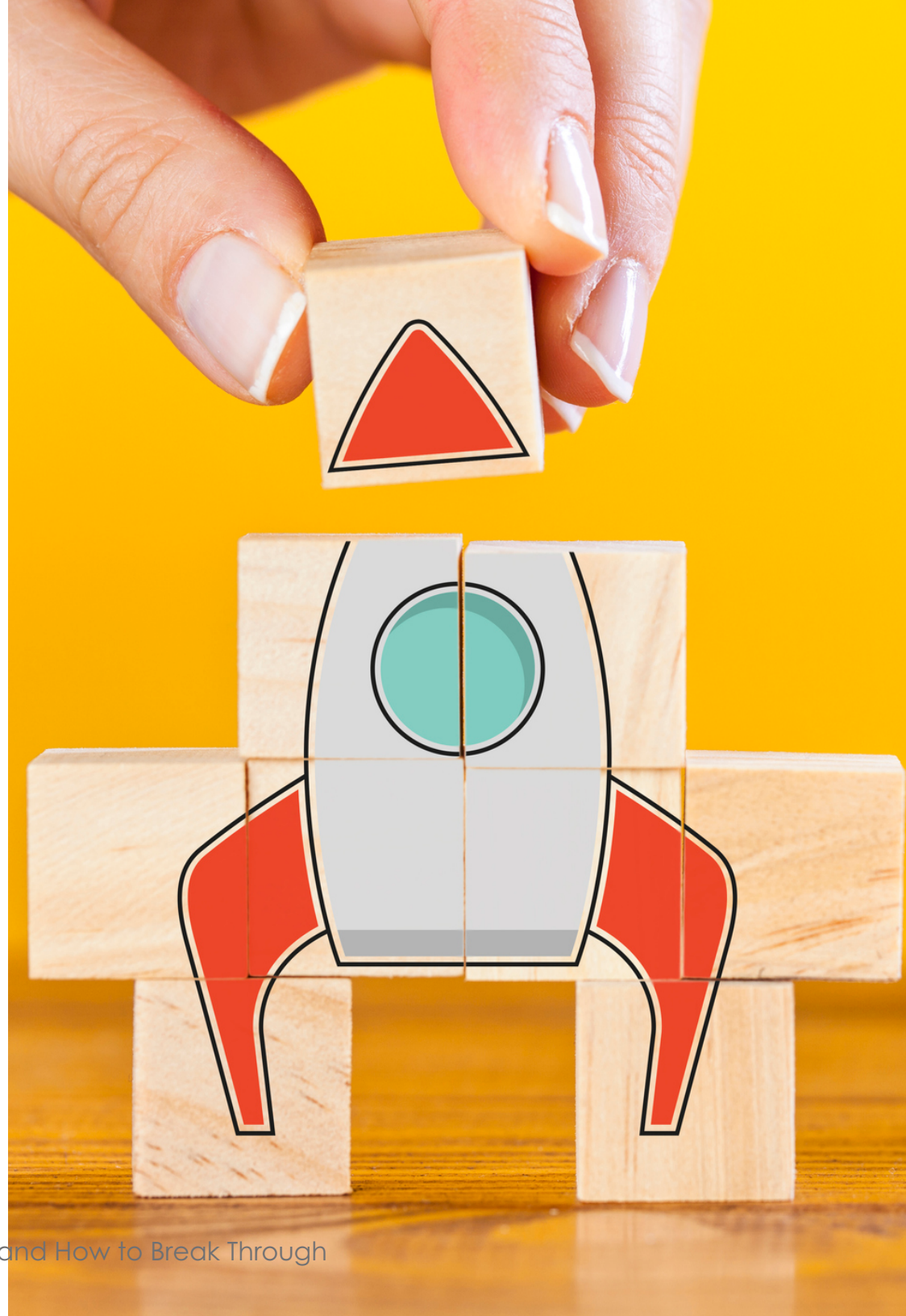
## Your Digital Transformation Starts Now!

We have discussed the current era of digital disruption, how effortless personal omnichannel can help you win, and the five keys to make it happen. At Bright Pattern, we are here to give easier, brighter customer service to companies of any size. It's a revolutionary cloud contact center that is easier and more modern than any other solution on the market. It's simple yet powerful.

## About Bright Pattern

Bright Pattern's cloud contact center software simplifies omnichannel customer service for customers, agents, and contact center managers. Bright Pattern's cloud contact center solutions are used globally in over 26 countries and 12 languages by companies of all sizes.

# BRIGHT PAT•TERN

**Bright Pattern is a true omnichannel platform, built for the modern contact center. I keep up my due diligence but I haven't found anyone doing it better."**

**Roger Meador
Co-Founder
Trusource Labs**

VIEW OUR 2019 TOP CX TRENDS

SEE HOW WITH BRIGHT PATTERN

www.brightpattern.com    |    sales@brightpattern.com    |    +1(650) 529-4099