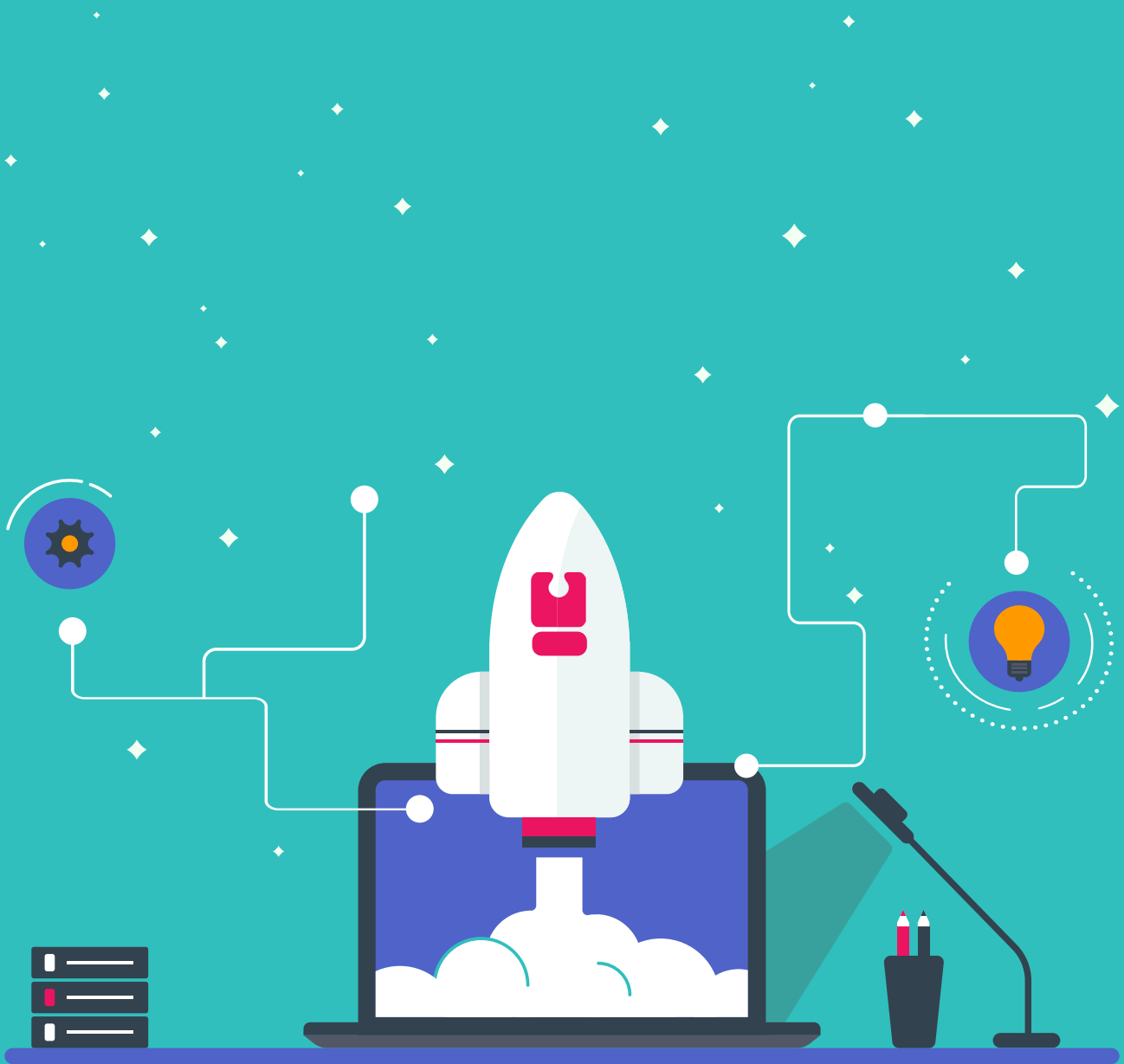


2021 CX Service Strategy planning guide



Introduction

The coronavirus pandemic has elevated the role of the contact centre and redefined its value, both for customers and organisational leaders.

Everyone involved has had to embrace huge change over a short period of time – from home working to digital-first engagement – all within the demands of budgets cuts and increased expectations from customers. Few imagine the near-term future will resemble pre-COVID operating models.

However, an uncertain outlook does not mean service leaders and teams can continue to rely on the slipstream created during the initial momentum of the pandemic. Agile execution comes from an aligned view of priorities.

In today's fast-changing world, priorities need regular review and engaging ways of sharing them with the many teams who power operational customer experience.

This is the reason Puzzel has teamed with industry innovator Martin Hill-Wilson to bring you a practical and fun way of planning your CX service strategy for 2021.

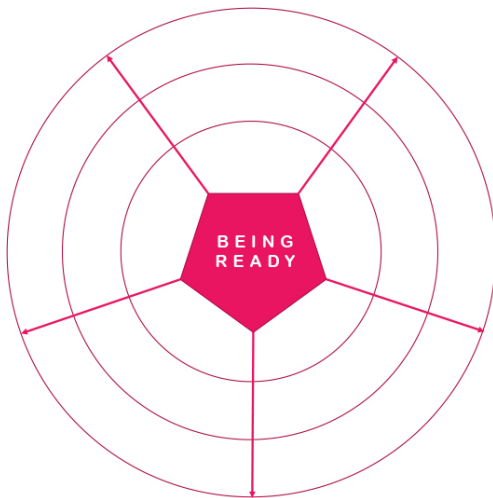


Overview of the Planning Process

You have probably received this e-book because someone attended an online briefing on how to run this planning process, Being Ready. You can listen to the recording of that briefing at <https://www.puzzel.com/uk/webinars/>

This e-book follows the same format with extra tips on how to develop an effective 2021 service CX plan.

Here are a couple to start with:



As an outcome, you are aiming to produce something which your teams will find easy to understand, recall and align with. As such, orientate your thinking to the headlines of what you want to achieve as opposed to the detail.

2021 is likely to be an equally eventful year requiring organisations to be agile and responsive in how they assess their priorities. Therefore, aim to provide people with an understanding of how the key elements of your strategy fit together rather than the detail. In-depth plans can be produced later.

Secondly, we recommend you aim to complete your plan within the following schedule since everyone is stretched for time:

- Answer all questions in the planner over two half-day online sessions at most
- Turn these into a draft version of your Being Ready plan using the blank slides in the provided PowerPoint pack in three hours or less
- Approve and rehearse your plan within two hours or less
- Present to internal teams and partners in three hours or less

Once everyone is initially orientated to the plan, we suggest you continue using the Being Ready template as a map throughout the year to help find new pathways to your outcomes as the next unexpected challenge arrives.

How to Organise Planning Sessions



You construct your plan from answers generated through team discussion in response to a series of questions.

These are organised into five strategy zones with three related topics in each zone. Each topic has a set of questions to guide team discussion with examples.

Pick your team with enough diversity to challenge conventional wisdom, but keep it small enough to maintain the pace of discussion.

As pre-workshop planning, make sure you set an agenda with clear timings. As your intended outcome, it is better to achieve a rough draft of the plan that can be polished afterwards than

get stuck on a topic or dive in too deep by trying to plan the detail. Appoint both a facilitator and timekeeper to keep conversations relevant and tight.

Remember the value of doing this is to refocus everybody's attention onto a flexible agenda suited to uncertain times. That means it must be simple enough to be easily understood and remembered.

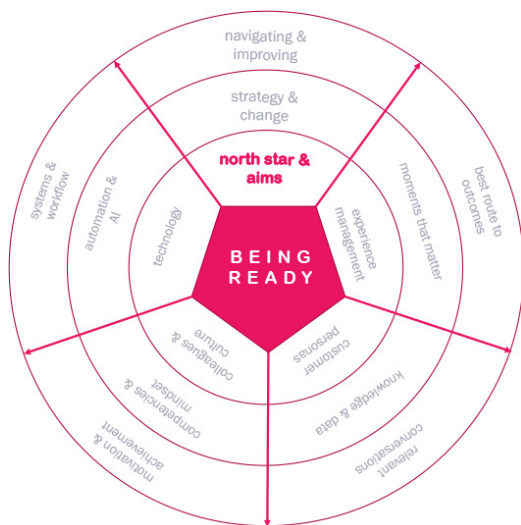
As a warm-up exercise, ask the group to reflect on 2020 and what made it such an extraordinary year. Then set the context that in such volatile times, it is important to have a plan, but it must be one that is flexible and helps keep everyone on the same page as things change.

Then offer an overview of the Being Ready planner using the PowerPoint version to rapidly take everyone through the zones and associated questions. This will help everyone get an initial sense of where certain topics appear. Explain that you might not need nor have plans for every topic. If so, you will just move onto the next topic.

Outputs from each discussion can be captured directly on the relevant blank page in PowerPoint, or on an online whiteboard and transferred later. The five strategy zones can be tackled sequentially or simultaneously by dividing the group into smaller teams and using breakout rooms on your preferred conference platform. Each group can then report back and make sure the strands of the plan align.

Zone One...

Direction and Focus



The topic of Direction and Focus starts with the most fundamental question about your collective orientation during 2021. This is often referred to as your North Star.

Here is the question to kickstart the discussion. What is our point of reference guiding 2021 priorities and decisions?

By means of example, it could be that the changing needs of customers guides everything you do, since the pandemic has triggered a sea change in the way customers live their lives and service expectations are also hanging faster than normal.

Or you might want a more focussed point of reference, for instance an intention to reduce

inbound demand. In this case, your north star is that you design service experiences to be proactive rather than reactive whenever possible.

The second question on Direction and Focus is about your key aims. What is the single most important outcome we want this year for customers, colleagues, and organisation?

Your headline answers could be as follows. Customer loyalty. Colleague wellbeing. Improved CX at lower cost.

When you have found the right way of expressing them, check that they provide a clear sense of Direction and Focus.

The second topic under Direction and Focus explores how you intend to make things happen. What do we need to focus on to make each outcome happen? As such, it needs to be tightly linked with whatever you decided in the first topic.

Here are some examples laid out to highlight how outcomes and strategy should link:

- Customer loyalty - fast reaction to poor CX
- Colleague wellbeing - a culture of self-care
- Organisation - effective self-service



Service expectations are also hanging faster than normal

Zone One Continued...

Direction and Focus

Once clarified, the next question becomes what do we need to do differently? Here is an example of how that could be answered:

- Customer loyalty - fast reaction to poor CX - clear accountabilities
- Colleague wellbeing - a culture of self-care - scheduled education
- Organisation - effective self-service - conversational AI



The third topic under Direction and Focus asks you to think about your collective responsiveness. Making a plan is one thing, delivering it involves continuous adaptation. So how do you practically develop this capability, especially if 2021 ends up as volatile as the previous year?

Here is your trigger question: How do we organise ourselves to keep adapting during a year full of change?

You might start thinking about your current Voice of Customer (VoC) programme as one of the ways in which you are alerted to changes in customer behaviour. However, you recognise it takes too long to get that information out to the right teams given the speed of change since COVID struck. Therefore, as an example, your

answer might be to target improved VoC responsiveness to new customer behaviour. An unrelated example could be that you decide to revisit your scenario planning for Brexit.

The second part of this topic focuses on your approach to improvement. How do we go about making things better? For example, you might decide to follow the approach many organisations are now taking by investing in agile-based, cross-functional teamwork.

As you complete each zone, take some time to sense check that topics link when necessary and that your language is precise (says what you intend) and concise (says it in as few words as possible).

Please note that the examples provided here range from the traditional to the most recent industry best practices. They are only intended to show the type of answer each question poses. They are not intended as nudges for a 'right' answer and their relevance will vary based on your own situation. If it helps to use other more relatable examples to trigger more relevant discussion, please do so.

Customer Experience Management

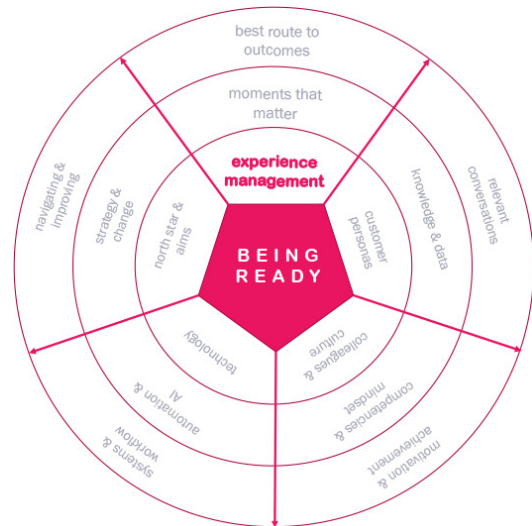
Most contact centres rightly see themselves as an important contributor to customer experience. This zone probes where you are in relation to how customer experience is managed as an organised discipline.

Some organisations use enterprise methodology and resources, others have embedded capability within the contact centre operation. So the question to answer is: what is our approach to experience management?

As an example, you might opt for investing in a multi-skilled CX team embedded in the contact centre. Equally you might have more modest ambitions and simply include the topic in your quality assessments and induction training.

The follow-up question in this topic focuses on outcomes. What is going to be 'new and improved' in our top service/sales journeys during 2021? This could range from prioritised phone access for vulnerable customers as a way of building on a popular 2020 service innovation, to introducing messaging with bot triage as a preferred customer channel offering more convenient asynchronous engagement.

As a final point, you might also choose a more expansive definition of experience management that includes both customer and employee, which acknowledges the synergies between both.



The next topic in the zone of Customer Experience Management is a deep dive into those points in service or sales journeys that customer feedback tells you matter and can be affected by you.

They are crunch points in terms of impacting cSAT (Customer Satisfaction) or NPS (Net Promoter) scores. They can weaken customer loyalty and potentially trigger a customer decision to look elsewhere.

The question becomes what are the loyalty breaking moments we must get right? An example is the frustration customers feel when asked to restate their needs because of being forced to swap channels or start again. Equally it could be an irritatingly complex sign-up process, an insensitive policy or a frequently broken SLA that was never updated since COVID.

Customer Experience Management

The second question explores priorities and commitment to action. Which are we going to fix this year? And for those that cannot be fixed this year because of time and resource constraints, the question becomes how do we minimise their impact meanwhile?

An example of how we intend to fix it could be as comprehensive as a new omnichannel platform. Damage limitation strategies could be retraining and monitoring the impact of proactive apologies or a more in-depth approach, such as investing in emotion management.

The final topic in the zone of Customer Experience Management is a radical one you might want to skip or feel inspired to experiment with.

Since the pandemic encouraged customers to trial new ways of engaging, the promise of omnichannel is quickly becoming a reality. While research suggests customers welcome a choice based on their circumstances, it does not follow that they want to use multiple channels to achieve their outcome.

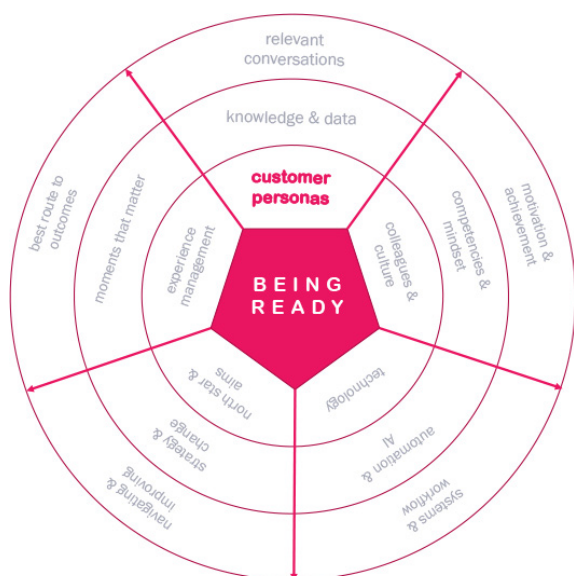
So, if we balance organisational and customer needs, the question becomes what are the 'best CX at lowest cost' routes that deliver customer outcomes in our top journeys? In other words, have we consciously designed and tested what we confidently believe is the fastest and lowest effort route to getting something done? An example might be that as far as applying for a new car insurance, we recommend a chat channel that uses a combination of virtual and human assistance.

If this seems like a useful way to reduce omnichannel complexity and focus everyone on ensuring channels are optimised for explicit customer outcomes, then the next point of discussion is how do we encourage customer adoption? Examples of how this is achieved can range from a high visibility recommendation on all online support pages to automatically routing customers via digital voice or visual IVR.



Zone Three...

Personalisation



One of the mega themes in customer engagement is personalisation. It has been a long-term ambition in digital marketing and one that becomes increasingly possible as digital-first agendas take root in customer service.

Another way of thinking about personalisation is relevance, which acts as a key enabler of fast, effective, low-effort resolutions.

The question to unlock the first topic in this zone is possibly new to some service teams. In terms of either distinct needs or behaviours, how many customer personas can we recognise and respond to?

A persona is a fictional character created to represent a user type that might use a site,

brand or service in a similar way. An example could be that we can recognise customers aged 65 and over with new online habits since lockdown. As a result, they might be more open to using web chat or might be attracted to digital voice-enabled service, which blends a familiar modality in a new online context.

One of the lessons from the pandemic is that people's behaviour can go through periods of accelerated change. This is what our second question explores. Are these personas up to date representations since the pandemic?

An example could be a persona that came into its own during 2020 – vulnerable customers. Many organisations have created prioritised routes for phone support as a result. As such, we might find we need to rethink who we categorise as vulnerable given the ongoing economic and health impact of the pandemic putting more customers at risk.

Of course, personalisation requires relevant data. So the question becomes what historic, third party or real time customer data can we start using? And in what situations?

An example could be using CRM data to pre-populate a new loan application. Or a more recent example could be using real-time customer intent recognition to drive routing decisions.

Many service organisations have responded to the pandemic by accelerating their self-service capabilities. This implies a robust approach to knowledge management that enables customers to easily find relevant and complete answers to their questions.

Your discussion on this topic begins by asking what are we doing on knowledge management to evolve self-service? Examples could be to rewrite the top ten FAQs with the intent of reducing escalation to live assistance or to invest in semantic search and auto tagging capabilities to increase discoverability.

Personalisation

The final topic in the personalisation zone is relevant conversations. This is sometimes described as the core customer expectation of Know Me.

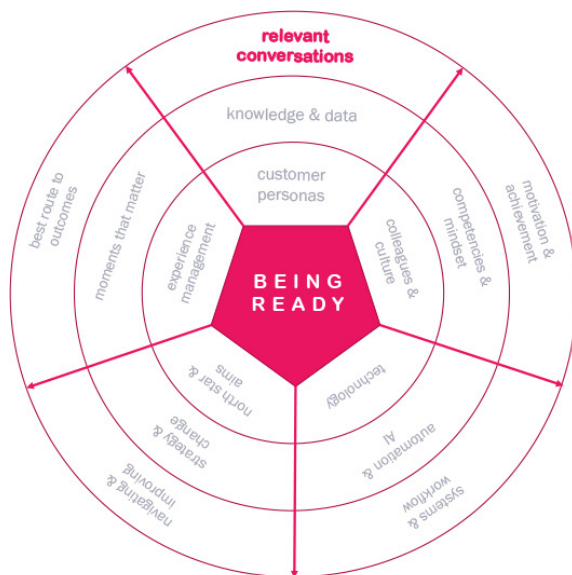
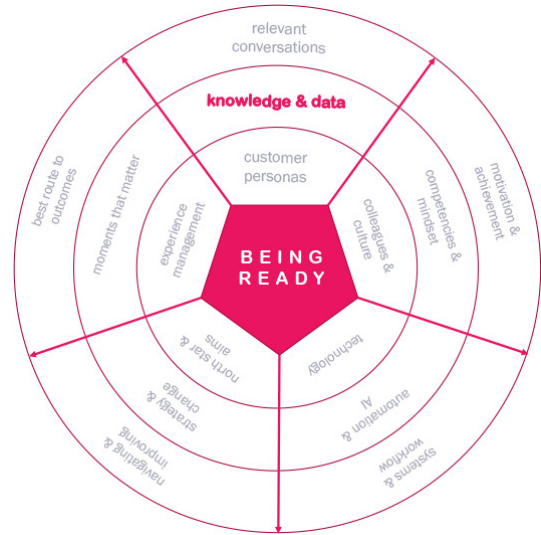
There often remains a gap between what is already known about a customer and using that insight to anticipate what matters to them.

The question to explore here is how can we express greater empathy for customer needs by better using what we know about them?

The emphasis is to reduce our reliance on expecting customers to keep reintroducing themselves. Instead, we use that insight to turn standard services into customised experiences.

For instance, we might offer customised recommendations as customers book their car for an annual service based on the history of that customer's prior service requests.

A more advanced version would be to enrich those recommendations by adding what others similar to that customer found relevant using machine learning to analyse other customer behaviours at scale.



The second question explores this opportunity in the context of self-service and proactive messaging. Are there ways we can make our self-service and proactive messaging more personalised and relevant this year? A relatively simple solution could be to use post codes to geo-target outbound updates on an energy or broadband outage. An example of a more sophisticated solution would be customised support pages based on real-time analysis of what a customer has been previously looking for or doing elsewhere on the website or mobile app.

Zone Four...

People

The overwhelming story of 2020 is how the pandemic has changed daily life. 2021 will be a continuity of that impact even with optimism around the timing and impact of vaccines and therapeutics.

While you are free to choose an entirely different focus, we have opted for the most topical as the trigger for the discussion about people. How do we continue to evolve colleague care during 2021?

This is in recognition that wellbeing and mental health are growing challenges and remain essential foundations for executing any service CX strategy.

Examples to guide that discussion could be a decision to invest in practical tools to self-diagnose and find solutions for personal wellbeing or it could be a decision that it is now time to upgrade homeworking standards as more organisations embrace a permanent home-office hybrid model.

The second question in this topic is the all-important question of culture. Of course, there are many approaches to exploring this topic. We have chosen to emphasise that culture evolves in line with the needs of people. In that sense, use the question how does responding to 2020/21 challenges influence what we value? An example of the way in which you might answer that could be greater commitment to trying new ways and rapidly adopting those that work.

Maintaining the right balance of skills in a rapidly changing world needs conscious attention. What new skills matter to our outcomes and how are they added during 2021?

This question provides an opportunity to review your skill needs based on decisions made during your zone one discussions.



People

Relevant examples could include service design to transform customer journeys, investing in the skills for wellbeing buddies, or it might be conversational AI design to accelerate self-service adoption or even micro learning to make traditional online courses more useful.

The next question explores what healthy mindset should we all aim to adopt this year? Examples could include compassion, gratitude, or willingness to show vulnerability.

The final topic in the People zone regards productivity and making sure we are doing everything to help people stay on their A-game.

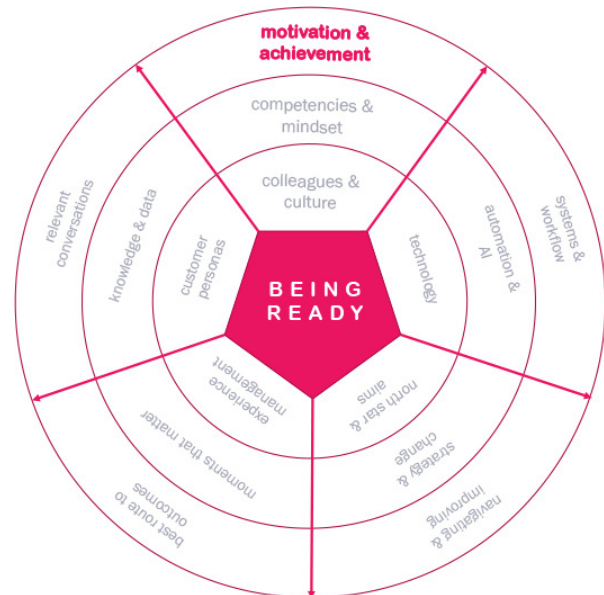
Ask the team what motivates us in how we work and engage each other and our customers?

The answer might be as simple as more frequently celebrating our successes and working out how that happens.

Secondly, 2021 is going to be a demanding year that will require people to keep performing in the way the best did throughout the first year of the pandemic. So the question becomes how can we better support each other to become and remain a high performing team?

There are many examples for how this could be addressed. For instance, you might decide to trial gamification to see if it motivates people or develop local community initiatives to channel people's motivation to help others or fund personal learning. This could include anything from digital reskilling to EQ.

The second question explores this opportunity in the context of self-service and proactive messaging. Are there ways we can make our self-service and proactive messaging more personalised and relevant this year? A relatively simple solution could be to use post codes to geo-target outbound updates on an energy or broadband outage. An example of a more sophisticated solution would be customised support pages based on real-time analysis of what a customer has been previously looking for or doing elsewhere on the website or mobile app.



Zone Five...

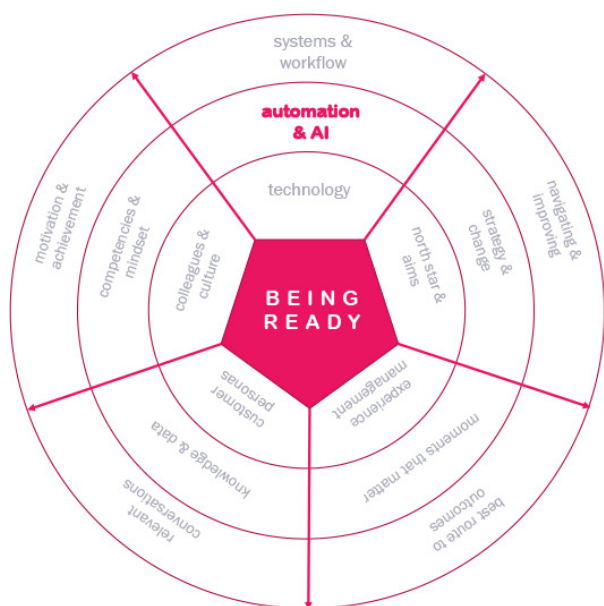
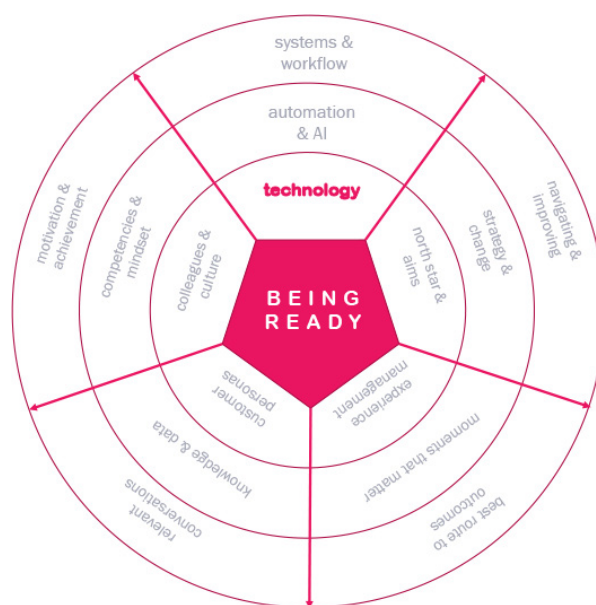
Digital EcoSystem

The final zone is about the combination of technologies that make up your digital ecosystem powering your service CX capability.

Evolving needs drives our first question. What are our key technology investments for 2021 and what benefits will they bring?

Examples could include integrating Microsoft Teams for faster internal collaboration or interaction analytics as input for Voice of Customer or quality management.

The second question focuses on their deployment. How will their introduction impact and involve us during the year? You might simply note when they are due and how they will be introduced, such as both trialled and rolled out in Q1-2.



Two of the most powerful categories of technology that impact CX and operating costs are automation and artificial intelligence (AI).

In the context of starting with needs and desired benefits, the two questions for discussion are:

What automation are we introducing for customers and colleagues this year?

How are we intending to use AI technologies this year?

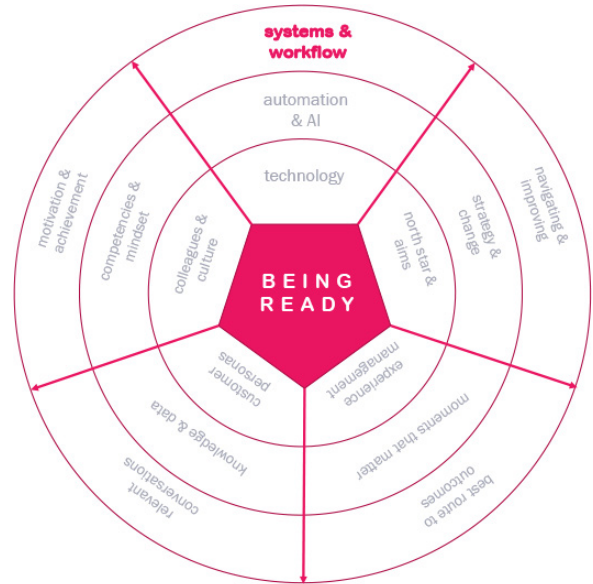
A common example of automation use is freeing up colleague time by automating post interaction administration such as call disposition and system updates. Likewise, AI technologies such as machine learning and natural language are increasingly being deployed for use cases such as predictive analytics for next best actions, agent assist and real-time intraday resource planning.

Digital EcoSystem

A key dependency for contact centres is the web of systems and workflows that need accessing to enable customer resolution. This impacts colleague productivity and enables effective self-service.

Our first question asks what systems are being upgraded this year and how will this affect us? An example could be the introduction of a new cloud-based CRM.

The second question explores what workflow improvements are we targeting and how will this benefit customers and colleagues? Examples could include the ability to digitally onboard new customers or to identify and verify them and to enable digital signatures for self-service ordering.



Final Thoughts

We hope you enjoy this approach to your 2021 plans and the result makes a positive difference to your achievements. If you have any questions about the Being Ready planner or how to run the session, please make contact with Martin Hill-Wilson via his LinkedIn profile.



About Puzzel

Puzzel is the leading European Contact Centre as a Service (CCaaS) provider. Our award-winning Customer Service Platform consists of three fully integrated, cloud-based solutions, including an omni-channel and AI-enabled Contact Centre, advanced email and Ticketing and Workforce Management, which are easy to use, quick to set-up and scalable for contact centres of all sizes. Customers can also customise the platform with dozens of third-party integrations available through our Puzzel Marketplace.

Puzzel was recognised as a Challenger in the 2019 Gartner Magic Quadrant report for Contact Centre as a Service in Western Europe and ranked in the top three European CCaaS providers for 2020 by Frost & Sullivan.

Based in Norway, and with offices across Scandinavia, Europe, the UK and Asia, we work with more than 900 customers across 40 different countries, helping businesses to achieve success beyond voice, connected experiences and empowered employees.

For more information please visit www.puzzel.com



Brainfood provides consulting and mentoring services for customer service and customer experience leaders and their teams. Current topics include digital first strategy, AI enabled engagement, emotive CX for customer interaction, and wellbeing strategies for 2021 and beyond.