PEGA®

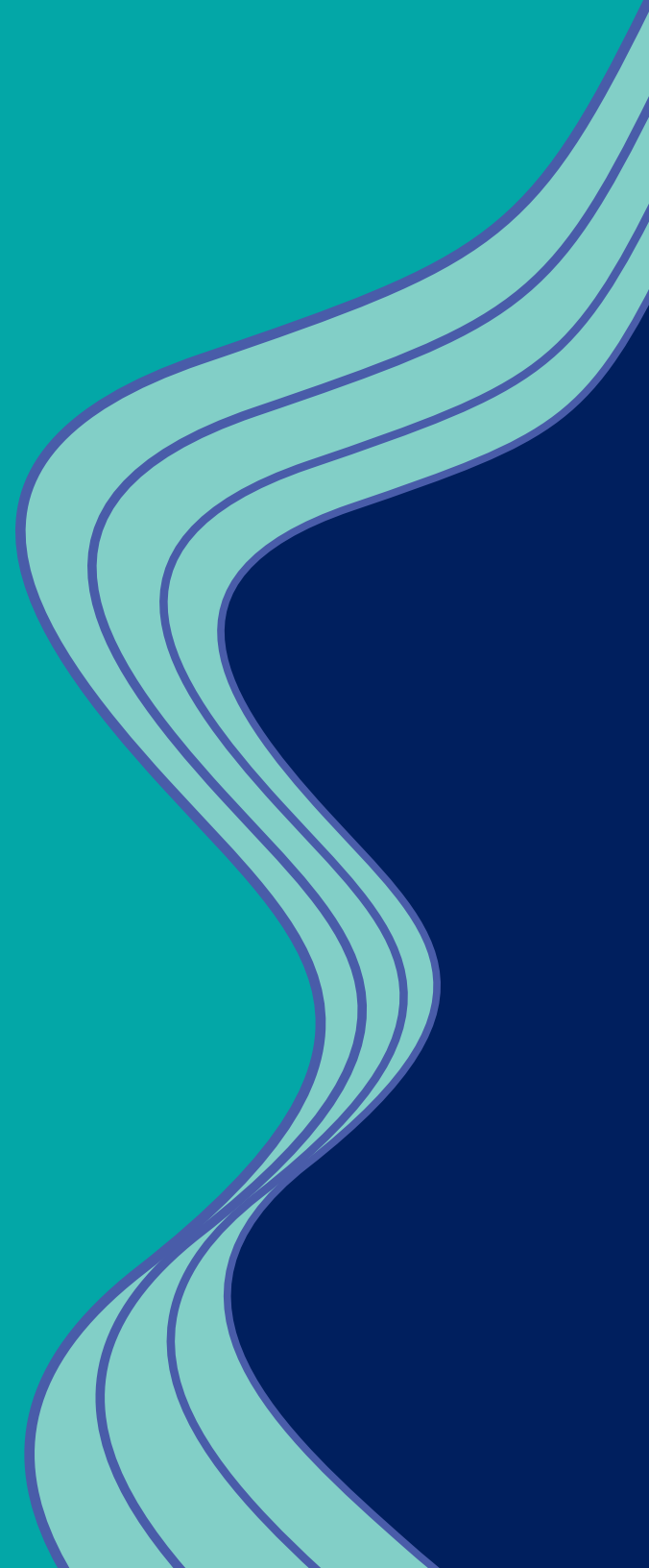# How to succeed with omni-channel customer service

Contents

Delivering exceptional service across every interaction

For more than a decade, nearly every enterprise has been striving to achieve omni-channel service: to deliver engaging customer service that meets customers on any (and every) channel. And you've probably made significant strides in your efforts. Maybe you've implemented a chatbot to welcome customers on your website or developed a mobile app, or maybe you built a new self-service portal for customers to easily get the answers they seek. But achieving that true omni-channel experience is easier said than done. It can be tough to evolve quickly enough when new channels are constantly emerging and customer expectations are constantly shifting.

Why businesses struggle with omni-channel roadblocks

Despite your best efforts, you may be running into some challenges that prevent you from delivering superior service on any channel – especially with our rapidly changing global environment. Those challenges often include:

- Increasing difficulties ensuring a consistent experience with each new channel

- Customers still putting in too much effort and waiting too long for resolutions

- Agents toggling between multiple applications and user interfaces with the emergence of new channels

- Agents still struggling to achieve visibility into the full customer context

If this sounds familiar, you are encountering some of the common roadblocks in the omni-channel approach. In reality, there is a lot more to it than offering service on all channels, or even offering a consistent customer experience across them (which is already hard enough).

Consistency is a great start, but it's not enough. You must seamlessly connect the customer journey for your customers (and agents), regardless of channel. It's about increasing efficiency, providing higher-quality service, and making things easier for everyone involved.

"Consistency is a great start, but it's not enough. You must seamlessly connect the customer journey…"

Challenge #1: **New channels are hard**
Focus on the journey

Chasing channels is not enough

Many organizations get so caught up in focusing on the multiple channels that they forget that it's the customer journey that really matters. It's acutally *more* difficult to **deliver great customer outcomes** when you're directing all of your energy to the channels.

Customer journeys increasingly span across multiple channels. You'll have a hard time moving with a customer between channels if you've treated each channel as a self-contained silo with its own logic. Keeping channels as separate silos will lead you to suffer from disconnected channels, disjointed conversations, and even worse – overly complicated customer experiences.

It's time to think channel-less

Start thinking about channels as merely a conduit for delivering service, so you can **focus on the customer journey.** When you take a channel-less approach, you can stop spending time thinking about each individual channel and concentrate on delivering easy, effortless customer experiences across the entire journey.

Stop worrying about channels and instead put the customer journey at the center – devising your strategy from the center out. A Center-outTM approach allows you to carry that journey, context, and history across every channel – rather than embedding siloed logic into each channel. The outcome is a seamless customer experience, regardless of how customers choose to interact – from digital self-service to asynchronous messaging to agent-assisted service.

Exposing data and context in a channel-less way will help you speed up your time to resolution, while minimizing the frustration your customers and agents may feel.

Looking to provide consistent, brilliant customer service experiences? Take the logic out of the channel and focus on the journey by using a <u>Center-out approach</u>.

Customer journey supersedes channel

NASCO focuses on customer journey over the channel. The U.S.-based healthcare company, a wholly-owned subsidiary of Blue Cross Blue Shield, manages complex healthcare requests that span across multiple systems and channels. NASCO implemented Pega Customer Service™ to provide agents with a comprehensive view of customer information and history. With this cohesive interface, email response rates improved to 98% within 24 hours and average handle time reduced by 10%. Among other great results, NASCO has achieved faster resolution and a more consistent experience across channels for members and providers.

Get the full story ▶

Challenge #2: **Customer effort is high**

Make service simple

Leave the heavy lifting to the machines

At the center of your service strategy should always be your customers and their satisfaction. They shouldn't have to do the heavy lifting. Unfortunately, too often, the service experiences customers encounter force them to do just that – from wading through information to repeating themselves until they feel like a broken record. The experience varies depending on which channel they choose and customers dread switching for fear of having to start over from square one again.

It's time to leave the heavy lifting to the machines. Employ artificial intelligence (AI) to carry data and customer context to **remove these points of friction.** When you approach service in this AI-enabled way, you can better utilize customer insights to understand customer intent and reduce the level of effort that's required from them. This also helps a customer get to a resolution faster, which is always the goal.

Create customer-centric experiences

When applied across the entire customer journey, AI uses relevant customer insight to identify and serve up the suggested next best action for each customer, one at a time. By tailoring experiences to a customer's specific need at that moment, you can **deliver personalized service** and help drive greater customer retention as well as cross-sell or upsell opportunities. Putting your customers first and maintaining context across channels will get them to resolution faster, no matter how they choose to engage with your organization.

Better yet, taking this customer-centric, channel-less approach, you can even start to provide **proactive service.** Breaking down silos and getting smart about your customers enables you to flip the conversation. You're better able to understand the customer context when you have the right, AI-driven insights. You don't have to wait for an issue to arise, forcing your customers to reach out to you to resolve it. Instead, you can get them on the path to resolution before they even realize something is awry.

Are you interested in reducing the level of effort your customers must exert to resolve service challenges? Let AI help you work smarter and make your customers' lives easier.

Challenge #3: **Your agents have to do it all**
Streamline the agent experience

Don't overlook your agents

While customers are at the heart of everything you do in customer service, your **agents are the backbone that supports truly excellent customer care.** As critical as the customer experience is, you also need to **think about your employee experience.** Under the traditional omni-channel approach, each time you add a new channel it adds another interface for your agents to deal with, more screens to manually copy and paste customer information between, and increased potential for error or missed opportunities.

No doubt it's important to consider the ease of the customer experience, but don't forget about the agent experience. The potential benefits of adding more channels for the customer can be quickly offset by the downsides for the agent. Agents end up spending more time wrapping up interactions, working in disconnected systems, and toggling between multiple user interfaces and applications just to serve their customer.

Agents can benefit from a channel-less approach as well. With context and history that's carried across interactions and channels, agents can spend more time focusing on their customers rather than on their computer screen.

Empower agents to add value

Agents need tools and actionable insights to make it as simple as possible for them to help a customer. They don't want to toggle between systems or have to pass customers from one department to the next like a game of hot potato. The channel should not matter; all that matters is that agents have the context they need to understand where a customer has been and what should happen next to help them get to a resolution as quickly as possible. A single, agent-friendly interface can go a long way in overcoming these challenges and improving agent happiness.

AI, case management, and robotic process automation (RPA) – paired with a customer-centric mentality – underpin the success of a channel-less strategy. AI and case management carry a customer's digital footprint across channels or interactions, so the customer doesn't have to repeat information they already provided on other channels. This allows agents to simply pick up wherever the customer left off and start adding value to the engagement right away. By using RPA, bots can assist agents by automatically filling in or updating information in multiple systems. With bots working in the background, agents are freed up to focus on solving the customer's challenge and providing an excellent experience.

Do you want to ease your agents' burden and frustrations with your current omni-channel strategy? Give them the right tools to solve customers' issues quickly and make it easier for them to do their jobs.

"The potential benefits of adding more channels for the customer can be quickly offset by the downsides for the agent."

Implementing next-gen service

Anthem, a leading health benefits company, needed to implement a next-generation service desktop to help give consumers greater access to care and a higher-quality experience. Anthem used Pega Customer Service to create Solution Central, which provides customer service representatives with the right content, instructions, and links at just the right time, which reduces dependency on training and service. Solution Central has also helped to reduce training time and increase agent productivity, while also providing a frictionless customer experience that has led to increased member retention.

Watch the video ▶
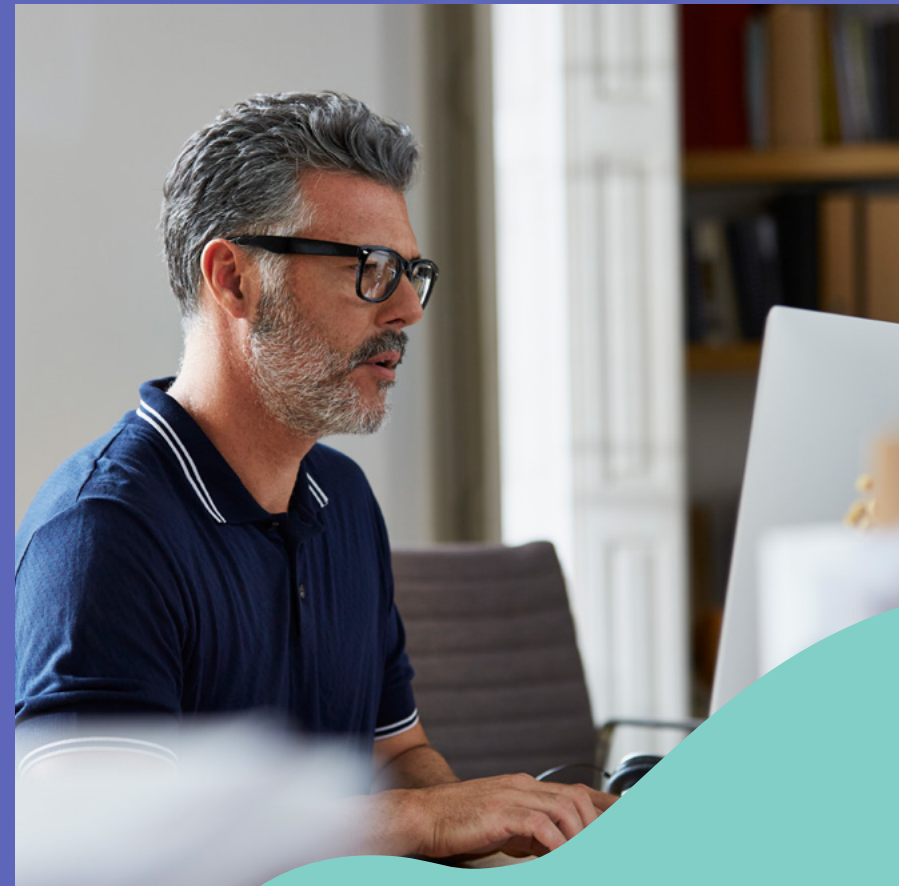
Not all roads (or channels) lead to an agent

Resolutions at every channel

Your agents are one of your greatest assets. In fact, 48% of customers consider knowledgeable service agents to be one of the most important aspects of customer service. But that doesn't mean your agents need to handle every customer inquiry. The recent increase in digital volumes might be causing you missed opportunities to **contain customer inquiries.**

In a channel-less world, any and every channel can and should lead to resolution – sometimes faster than a traditional call into the contact center. With AI and appropriate customer insight, your customers may be able to get the answers or solutions they need through an intelligent self-service portal, from a chatbot, or via a mobile app. This opens up several different paths customers can take to get the service they're looking for, many of which have no agent involvement. Containing certain inquiries through these channels can speed up the time to resolution, while decreasing the volume of interactions your agents must handle. This creates a win-win situation: Customers receive the solution they're looking for on whichever channel they prefer, and agents can focus more time and energy on the customers who seek their assistance.
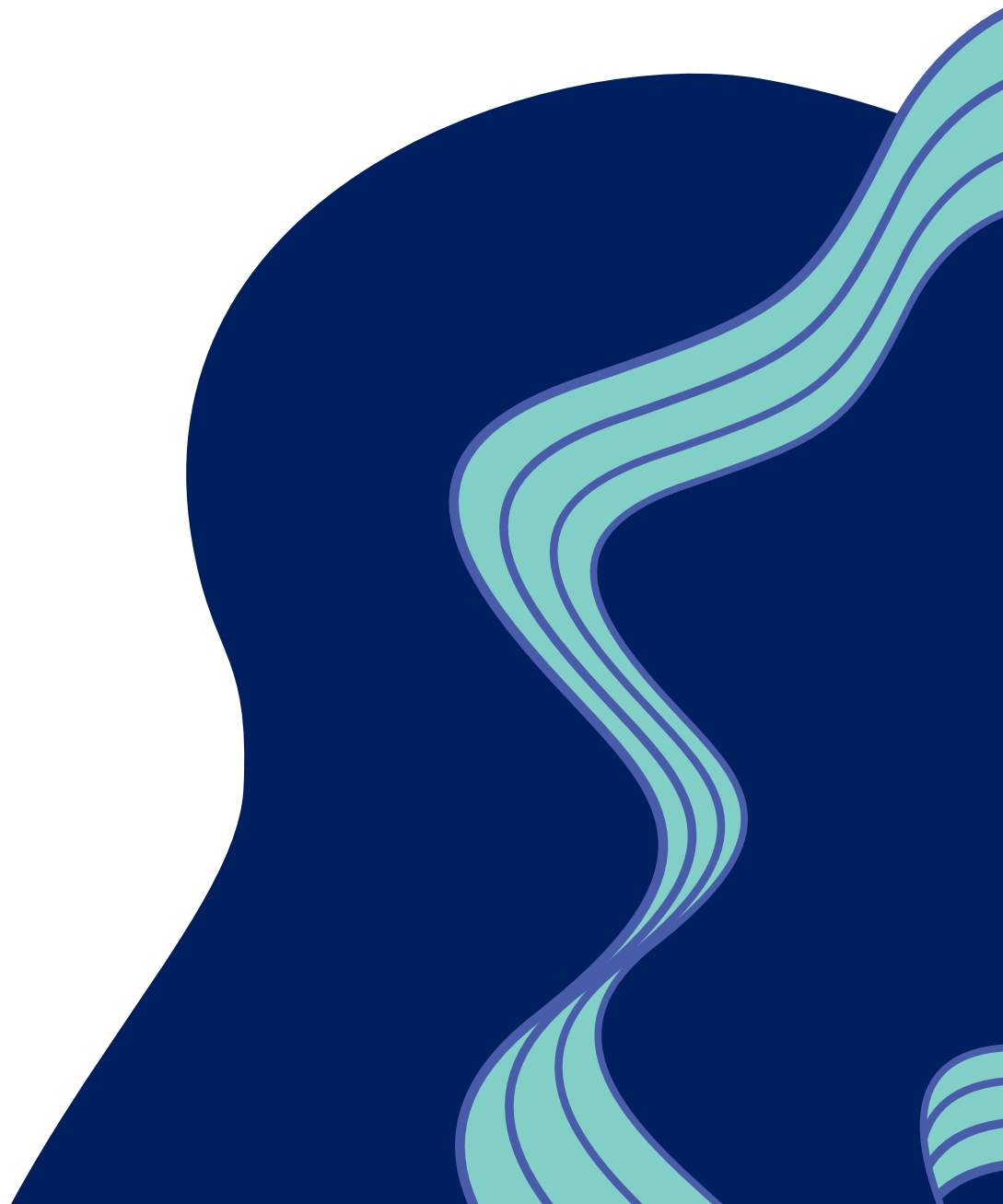
Achieving channel-less success

If you want to overcome the shortcomings and common roadblocks of the traditional omni-channel approach, it may be time to switch up your mindset. Put the customer journey at the center of your customer service efforts. To get there, remember these six tips:

1.   **Move from a channel-led to channel-less approach.**

2.   **Devise your strategy from the center out.**

3.   **Leave the heavy lifting to the machines.**

4.   **Create customer-centric experiences.**

5.   **Don't overlook your agents.**

6.   **Empower agents to add value.**

Once you've defined your new mindset, Pega is here to help you with the technology and tools to make your frictionless vision a reality.

Looking to get started on your journey?

Check out our 30-minute webinar: The Omni-Channel Breakthrough: Go Channel-Less.

Visit our website to take your first step toward channel-less customer service.

About Pegasystems

We are Pegasystems, the leader in software for customer engagement and operational excellence. Our adaptive, cloud-architected software – built on the unified Pega Platform™ – empowers people to rapidly deploy and easily change applications to meet strategic business needs. Over our 35-year history, we've delivered award-winning capabilities in CRM and digital process automation (DPA), powered by advanced artificial intelligence and robotic automation, to help the world's leading brands achieve breakthrough business results.

For more information, please visit us at **pega.com**