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# Achieving Digital Customer Service Transformation

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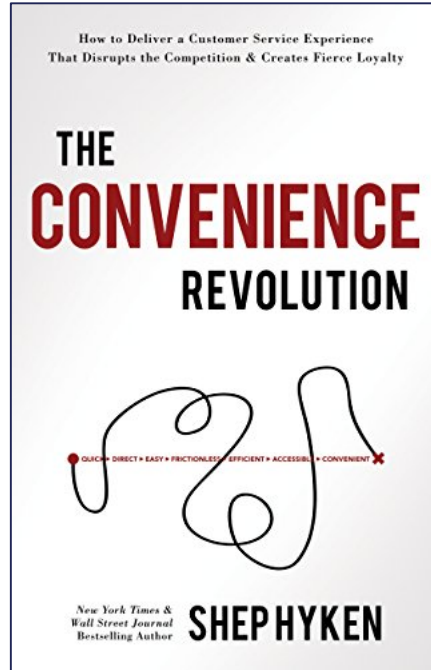
# Today's presenters



**Shep Hyken**

Hall of Fame Speaker—New York Times and Wall Street Journal Bestselling Author

**SHEPARD**  
VIRTUAL TRAINING  
Another Shepard Presentation



**Jeff Nicholson**

Global Head of CRM





Are you abusing your customers with unnecessary friction?

# The 3 things your customers now expect



## Personal

- Compelling
- Contextual
- Journey



## Easy

- Frictionless
- Fast
- Effortless

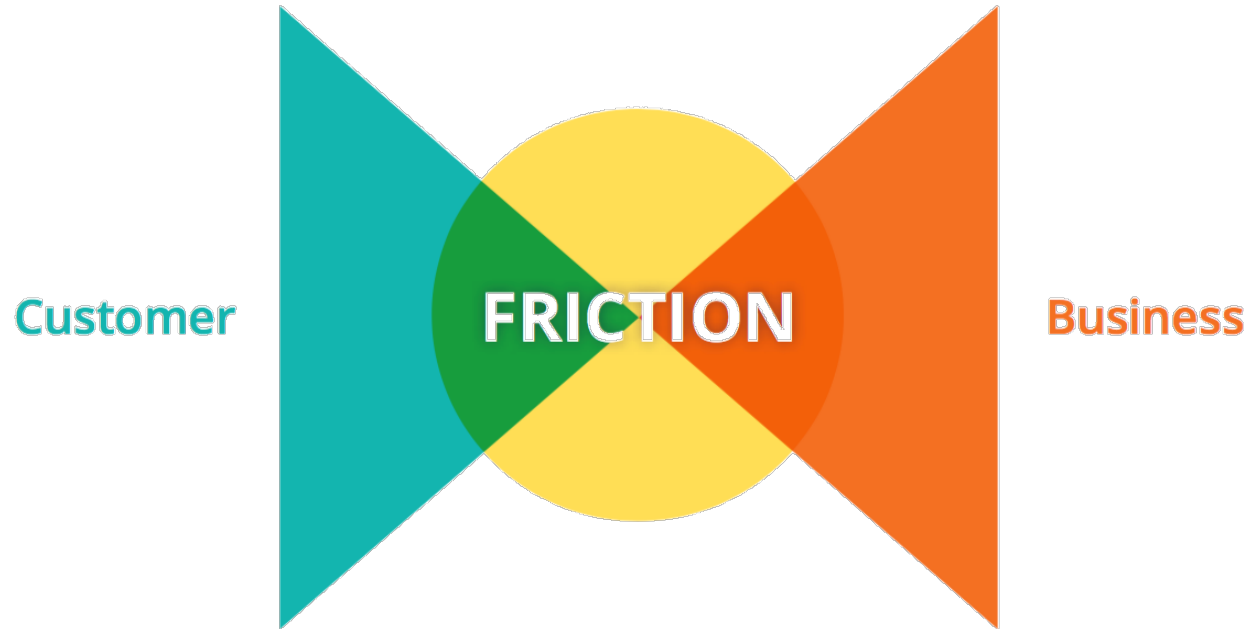


## Connected

- Across channels
- Across interactions
- Seamlessly



# Customer service friction: A double-edged sword



# Identifying service friction points: Customer-side



Category	Identifiers	Rapid Resolutions
Duration	<i>"Why does this take so long?"</i>	<b>End-to-end automation and robotics</b> accelerate outcomes across systems
Identity	<i>"Why don't you already know who I am?"</i>	<b>Real-time omni-channel AI</b> to understand each customers' journey, in real-time
Memory	<i>"Why do I have to repeat myself?"</i>	<b>Case management</b> maintains each customer's state across channels, agents, and interactions
Consistency	<i>"Why is the answer different each time?"</i>	<b>Real-time omni-channel AI</b> and <b>case management</b> powers decisions and processes that are channel-less
Visibility	<i>"Where do I even stand in the process?"</i>	<b>Case management</b> supports transparency to avert agent interaction altogether
Empowerment	<i>"Why can't I do this myself?"</i>	<b>End-to-end automation</b> lets you redesign your processes for digital self-service
Proactiveness	<i>"Why did I even have to ask?"</i>	<b>Real-time omni-channel AI</b> uses pattern and event detection to anticipate customer needs

# Identifying service friction points: **Employee-side**



Category	Identifiers	Rapid Resolutions
Manual sign-on	<i>"Why do I need to log into all these systems manually, just to get going?"</i>	<b>Robotic desktop automation</b> can be applied as a personal robot on each agent's desktop
Siloed applications	<i>"Why do I have to deal with so many screens and applications?"</i>	<b>Robotic desktop automation</b> and <b>interface "mash-up"</b> can hide the complexity from agents
Manual data entry	<i>"Why do I need to use pen &amp; paper to help me move info across systems?"</i>	<b>Robotic desktop automation</b> can move information across non-integrated applications
Enterprise amnesia	<i>"Why do I have to ask the same question they've already answered elsewhere?"</i>	<b>Dynamic case management</b> maintains customer's state across channels & interactions
Dis-empowerment	<i>"Why do I need to pass this customer from person to person?"</i>	<b>Case management</b> and <b>AI-powered "next best action"</b> provide channel-less brain and muscle
Failed self-service	<i>"Why couldn't they find this information on our website?"</i>	<b>Contextual self-service</b> senses customers' needs and surfaces relevant insights
Manual wrap-up	<i>"Why do I have to spend so much time wrapping up each interaction?"</i>	<b>Robotic desktop automation</b> automates dissemination of this information

**“After pursuing omnichannel for almost a decade, over 85% of organizations have fragmented customer engagement channels, leading to inconsistent customer experience (CX).”**

“Hype Cycle for CRM Customer Service and Customer Engagement, 2018” Gartner July 2018





# “Channel-less” is the new way forward

## Moving From Omni-Channel To A Channel-Less Customer Experience



Shep Hyken, CONTRIBUTOR

I write on customer service, customer experience and related topics. [FULL BIO](#) ▾

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Frankly, I'm tired of the terms *omni-channel* and *multi-channel*. For several years everyone has been talking about omni-channel support or multi-channel support. Being able to connect to a company on the customers' preferred channels is important. Do they want to contact you through email, a social media channel like Twitter or Facebook, a review site, the traditional way via phone or even in person? Do they want to buy online, onsite, in-store or over the phone?

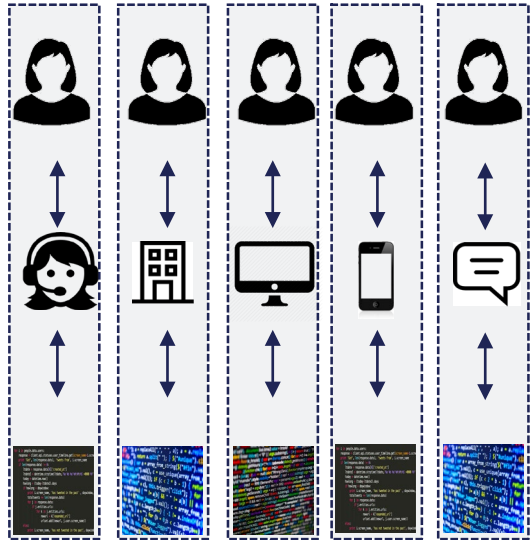
# Forbes

“*Channel-less* is not only easier for a customer, it's also an easier concept for companies to grasp.”

- Shep Hyken  
March 2017

# Evolution of omni-channel strategy

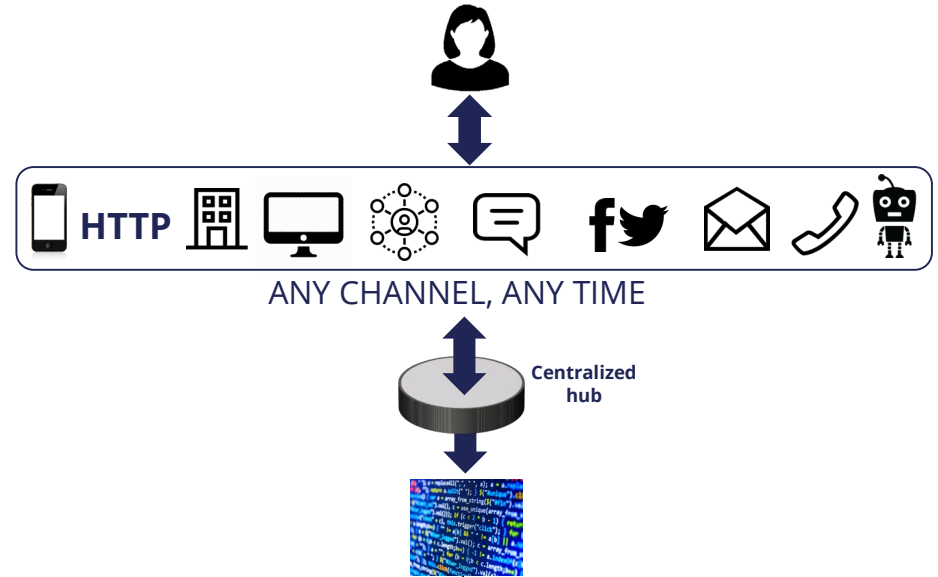
## Channel-led execution



**Lacking:** Centralized rules, logic, deep understanding of the complete customer journey.

VS.

## Channel-less execution



**Included:** Centralized hub that can aggregate in real-time: Cases, predictive insight, personalized with understanding of the complete end-to-end customer journey.

# “Contiguous” Experience



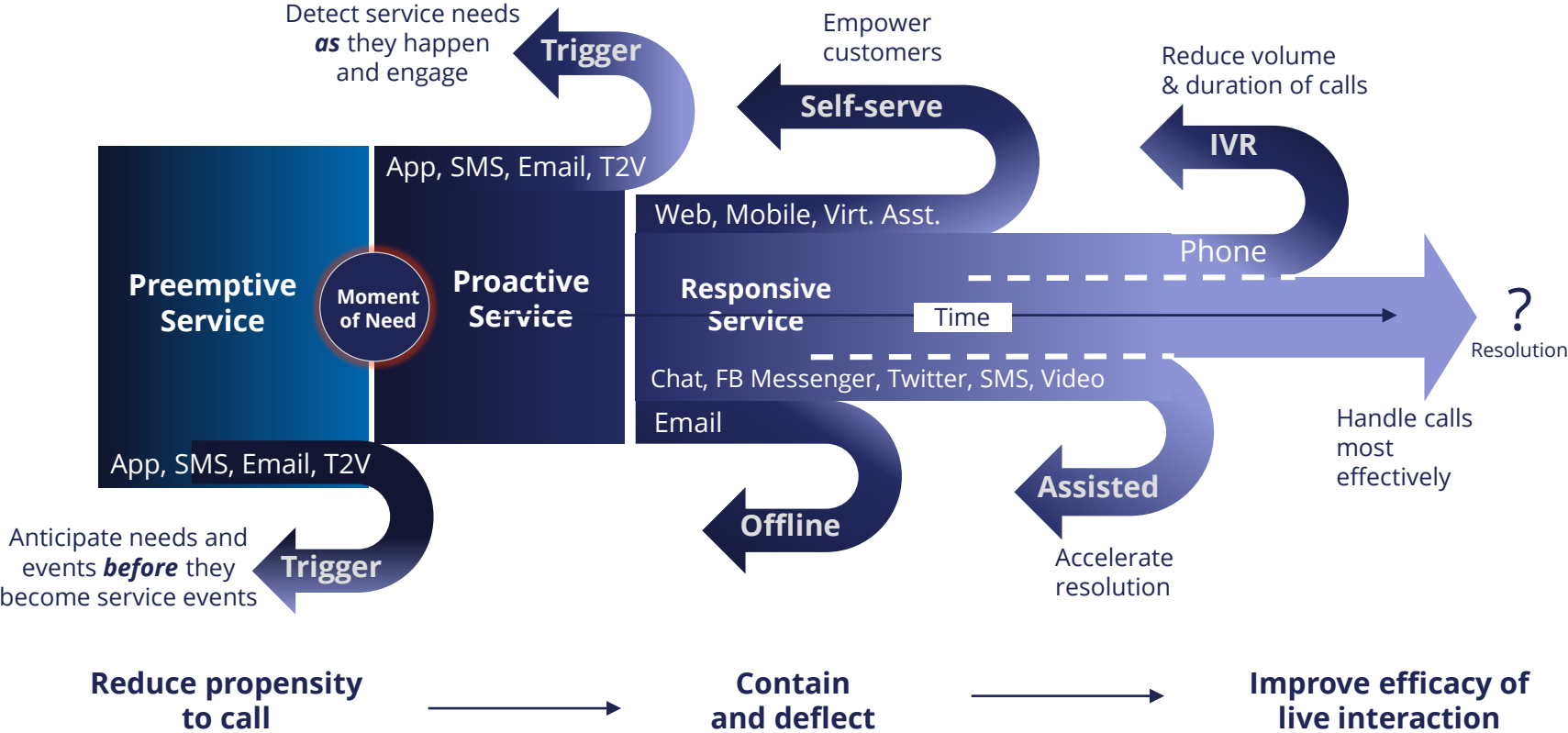


Omni-channel?

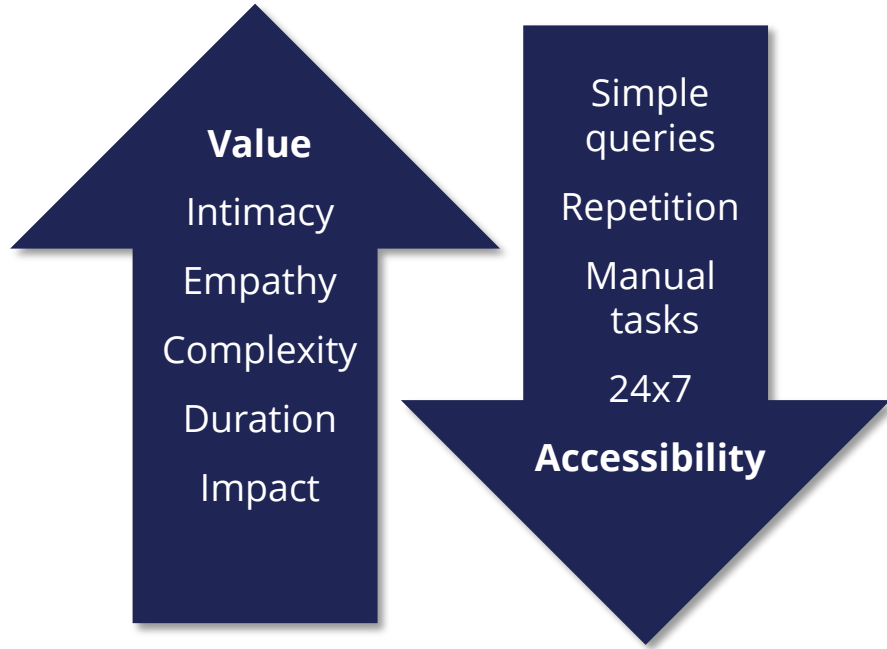
A long, straight asphalt road stretches from the foreground into the distance, leading towards a range of mountains under a warm, golden sunset sky. A dashed blue horizontal line is drawn across the middle of the road. The text 'Channel-less' is overlaid in white at the bottom.

Channel-less

# A Digital Transformation of Customer Service Strategy

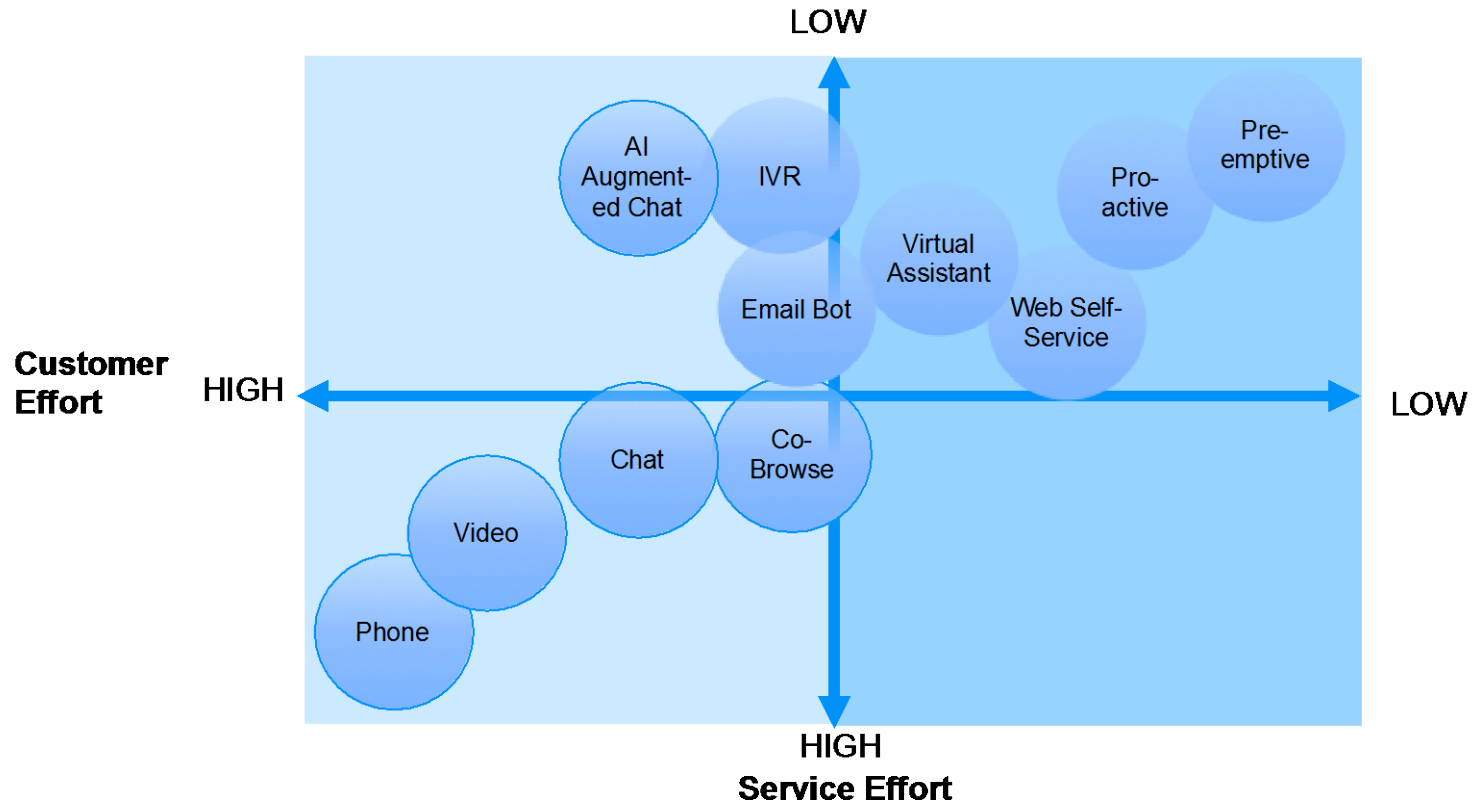


# The changing role of agents in the era of AI



# SUPER AGENT

# Mapping effort for service strategies



# Top client and business “win/wins”

STRATEGY	CUSTOMER WINS				BUSINESS WINS			
	Empower	Accelerate resolution	Reduce effort	Improve experience	Contain/deflect	Reduce labor/AHT	Improve FCR	Reduce error
Web self-service	✓	✓	✓	✓	✓	✓		✓
Chat		✓	✓	✓	✓	✓		
Chatbots/ intelligent virtual assistants		✓	✓	✓	✓	✓		
Social messaging	✓	✓	✓	✓	✓	✓		
Intelligent IVR	✓	✓	✓	✓	✓	✓	✓	
Email bot		✓				✓	✓	✓
Co-browse	✓	✓	✓	✓	✓		✓	✓

Getting your vision over the line:

Justify  
**client wins**  
 with  
 tangible  
**business outcomes**



# Executing on success: Getting started quickly

Industry	Popular customer journeys for commencing DX
<b>Communications and media</b>	<ul style="list-style-type: none"><li>Inquire into billing/order status</li><li>Conduct guided troubleshooting</li><li>Upgrade equipment</li></ul>
<b>Financial services (e.g. retail)</b>	<ul style="list-style-type: none"><li>Inquire into account info</li><li>Register complaint/dispute</li><li>Manage collections and recoveries</li></ul>
<b>Manufacturing (e.g. automotive)</b>	<ul style="list-style-type: none"><li>Inquire into order status</li><li>Conduct break-fix (field service)</li><li>Manage warranty/recoveries</li></ul>
<b>Insurance</b>	<ul style="list-style-type: none"><li>Execute policy change/policy loan</li><li>Resolve agent query</li><li>Manage policy payment/billing</li></ul>
<b>Healthcare (e.g. payer)</b>	<ul style="list-style-type: none"><li>Personalize interactions and care (end-to-end)</li><li>Resolve billing/benefits inquiry</li><li>Onboard members</li></ul>
<b>Government</b>	<ul style="list-style-type: none"><li>Benefit onboarding/enrollment</li><li>Service online application</li></ul>

Real stories. Real digital success.

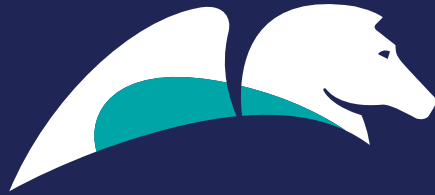


# How to get started:

## Key takeaways

- Assess 7 primary friction categories (honestly)
  - For customers AND employees
- Don't make the same mistakes of the past
  - Go channel-less, avoid silos
- Success is much more than AHT
  - Move from reactive strategies to proactive, preemptive
- Can't solve 100% overnight
  - Get started a journey at time





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Build for Change<sup>®</sup>