CEB
WHAT THE BEST COMPANIES DO

CEB Customer Contact Leadership Council®

Blueprint for Building a Low-Effort Service Organization

AVOID CHANNEL SWITCHING

General Considerations

- ☐ Conduct an internal assessment of channel containment in self-service to identify potential causes of why customers switch from self-service to live service channels.
- ☐ Have reps learn about channel switching root causes by simply asking phone customers if they tried to resolve their issue in self-service prior to calling, and why they were not successful.
- ☐ Work with Web team to develop a Web-based survey that tracks the reasons why customers fail when self-serving, and understand what their next likely steps entail.
- ☐ Identify cost and loyalty impact of channel switching, based on internal assessment and CEB Customer Contact data, to begin rallying business support around self-service improvements.
- ☐ Involve reps in identifying self-service language that could be clarified and when to encourage customers to take additional steps online (i.e., “while you’re online, you should also do this”).

Guidance Derived from Cisco Best Practice

- ☐ Form a task group to brainstorm how different types of customers solve problems, arriving at customer segments indicative of specific self-service styles.
- ☐ Partner with Web team to introduce intuitive paths for each of these segments to easily self-serve.

Guidance Derived from Travelocity Best Practice

- ☐ Identify top 10 call reasons; revise related online FAQs using a readability index (e.g., Gunning-Fog Index targeting an 8th grade reading level).

How CEB Customer Contact Can Help

- Assess the most likely sources that cause customers to channel switch using CEB Customer Contact’s Web Stickiness Audit tool.
- Leverage CEB Customer Contact data for benchmarks and to augment business cases for self-service or multi-channel investments.
- Use CEB Customer Contact’s Issue-to-Channel Mapping tool to identify the appropriateness of existing channels for resolving particular customer issues and requests.

PREVENT NEXT LIKELY ISSUES

General Considerations

- ☐ Have reps note calls which are clearly repeat issues to better understand the scope of likely next issues.
- ☐ Allow QA to note calls which are clearly repeat issues to better understand the scope of likely next issues.
- ☐ Enable QA to note where “next issue avoidance” should have occurred, but isn’t happening. Work with supervisors to create coaching plans based on these findings.

Guidance Derived from Wells Fargo Best Practice

- ☐ Implement rep-level repeat call metric for FCR to ensure that “next issue avoidance” is being practiced.

Guidance Derived from Bell Canada Best Practice

- ☐ Leverage rep focus group to identify likely next issues based on the original customer inquiry (for the most common inquiry types); create a map of original issues and the associated likely next issue.
- ☐ Encourage rep usage of issue map to identify which issues to forward resolve during the initial customer contact.

Guidance Derived from Fidelity Best Practice

- ☐ Have reps learn about channel switching root causes by simply asking phone customers if they tried to resolve their issue in self-service prior to calling, and why they were not successful.
- ☐ Liaise with Web team to incorporate next step prompts for customers engaged in online self-service activities.

How CEB Customer Contact Can Help

- Use CEB Customer Contact data to benchmark FCR rates and measurement approaches with peer organizations.
- Engage in an overview or brainstorming session on next issue avoidance approaches with CEB Customer Contact Advisory Services.

PRACTICE EXPERIENCE ENGINEERING

General Considerations

- ☐ Explain benefits of experience engineering to reps accounting for both the improved customer experience, and improved rep interactions with customers.
- ☐ Explicitly account for the differences between soft skills versus experience engineering with the entire leadership team, managers, and reps.

Guidance Derived from Osram Sylvania Best Practice

- ☐ Have QA identify most common “no” scenarios and negatively-framed communication with customers.
- ☐ Have QA identify and listen for overuse of negatively-framed communication (e.g., can’t, don’t, won’t, no) for coaching opportunities.
- ☐ Leverage trainers/coaches to create guidance for rephrasing common “no” scenarios and negatively-framed communication with customers into positively-framed exchanges.

Guidance Derived from Loyalty One Best Practice

- ☐ Have QA identify how top-performing reps orient the customer to “next-best” alternative solutions or less-than-ideal customer outcomes. Focus attention on how they qualify true customer needs and frame solutions in light of those needs.
- ☐ Leverage trainers to develop a “blueprint” that helps reps initially learn to qualify underlying customer needs and account for those needs as a solution is positioned to the customer. Use this blueprint for teaching reps experience engineering techniques.
- ☐ Have trainers create development plan complete with introduction, role plays, on-floor skill drills, and coaching.

Guidance Derived from Bradford & Bingley Best Practice

- ☐ Introduce concept of personality types and differences between each personality.
- ☐ Conduct training session to help reps internalize concept of personality types.
- ☐ Have trainers and coaches create role plays that illustrate personality types of hypothetical customers; use role plays as practice for diagnosing caller personality types.
- ☐ Teach reps how to treat each customer type and how to modify responses based on personality.
- ☐ Have coaches continually reinforce the lessons of personality-based issue resolution.

How CEB Customer Contact Can Help

- Allow us to train your trainers at CEB Customer Contact Workshops on personality-based customer service.
- Access CEB Customer Contact’s Soft-Skills Resource Center, complete with training facilitation guides, role play scenarios, exercises, and QA forms for the deployment of personality-based customer service.
- Leverage CEB Customer Contact’s Executive Advisors as guidance for rollout of experience engineering approaches.

COACHING

As coaching is the single greatest performance lever in the customer service organization, all coaching efforts should align with effort reduction and rely on proper coaching methods.

How CEB Customer Contact Can Help

- Assess the current health of coaching practices with CEB Customer Contact’s Coaching Pulse Survey.
- Have your trainers attend CEB Customer Contact’s Train the Trainer Workshop on Coaching Effectiveness.
- Review proper coaching approaches in CEB Customer Contact’s work on Redefining the High-Performing Supervisor.
- Communicate the importance of coaching on the customer experience to your team using CEB Customer Contact’s training materials on best-in-class coaching methods.

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ENABLE REPS TO REDUCE EFFORT

General Considerations

- ☐ Clearly message effort reduction as the primary goal of the organization, and communicate how employee actions connect to the effort reduction strategy.
- ☐ Create a high control quotient (CQ) environment to ensure reps can take control over customers
- ☐ De-emphasize internal productivity metrics to ensure focus is placed on appropriately serving the customer.
- ☐ Ensure reps have transparency into service organization goals and are able to have a clear line of sight as to how their daily work impacts these larger goals.
- ☐ Create formal peer support networks by providing virtual and/or live ways for reps to connect with each other on a regular basis without management presence.
- ☐ Explicitly account for ways in which you are making it easier for reps to create low-effort customer experiences (e.g., systems enhancements, removal of outdated policies).

Guidance Derived from Telco[1] Best Practice

- ☐ Have QA conduct outbound interviews to augment the QA process, specifically identifying where the rep could have better accommodated the customer.
- ☐ Coaches and trainers should incorporate the direct customer voice into coaching interactions.

Guidance Derived from Sun Life Financial Best Practice

- ☐ Facilitate voluntary workshops for groups of reps to understand service organization goals and come up with rep-level actions to support these goals
- ☐ Ensure the workshops are run by reps, with the facilitator merely guiding the conversation
- ☐ Have managers work 1:1 with reps on their teams to come up with individual development plans to tackle these rep-level actions

Guidance Derived from Telecom New Zealand Best Practice

- ☐ Make changes relevant and concrete to supervisors by asking them to identify specific examples of things they can change in their daily activities.
- ☐ Use social networks to create accountability and help sustain behavioral changes.

How CEB Customer Contact Can Help

- Benchmark productivity metrics and identify methods for reducing the constraining nature of such metrics while being mindful of bottom line impact.
- Brainstorming session with CEB Customer Contact's Executive Advisors on ways to communicate low-effort focus to reps in a clear way.
- Improve coaching delivery by deploying CEB Customer Contact's Integrated Coaching Method.
- Use CEB Customer Contact's Executive Advisors to discuss ways to boost the control quotient (CQ) in your organization.

CAPTURE AND MEASURE EFFORT REDUCTION

General Considerations

- ☐ Socialize the concept of customer effort throughout the organization through a kickoff initiative. Highlight and recognize the actions of "low-effort" champions in the organization.
- ☐ Create a low-effort motto or service commitment for internal use (e.g., Nedbank's "Ask Once" motto).
- ☐ Communicate the connection between customer effort and reps actions. Involve reps in identifying such connections and augment communication with CEB Customer Contact data on the impact customer effort has on disloyalty.
- ☐ Pilot the use of the Customer Effort Score 2.0 as a customer experience metric.
- ☐ Augment customer effort measurement by capturing targeted VOC indicative of high or low effort experiences.
- ☐ Use the Customer Effort Score to help highlight and prioritize immediate customer effort reduction wins.
- ☐ Have QA highlight sources of customer effort and identify improvement areas at the rep and organization level.
- ☐ Examine Customer Effort Score by issue type codes, rep batches/pools, service channel, and lines of business to identify trends.
- ☐ Launch the Customer Effort Assessment at your organization.

How CEB Customer Contact Can Help

- Leverage CEB Customer Contact's Executive Advisors to discuss how to deploy the Customer Effort Score customer experience metric and tailor it for your customers or current survey tool.
- Discuss initial Customer Effort Score datasets and brainstorm next steps with the CEB Customer Contact research team.
- Audit current customer experience survey; identify and collaborate with CEB Customer Contact's Executive Advisors on how to improve or redesign survey to capture loyalty indicators.
- Gain access to dedicated network of companies that have implemented the Customer Effort Score.
- Use CEB Customer Contact's Customer Experience Forum, with over 16,000 peers in customer service management, to understand their approaches to reducing customer effort.
- Talk to your account manager about CEB Customer Contact's Customer Effort Assessment.

PROACTIVELY SEEK CUSTOMER FEEDBACK

General Considerations

- ☐ Distribute post-contact survey to customers asking them to rate their experience and Customer Effort Score in service interactions.
- ☐ Treat scores of moderately-high to high customer effort (specifically 3s and 4s on the CES scale) as a leading indicator of disloyalty or "at-risk." Treat such customers as candidates for proactive service outreach.
- ☐ Speak candidly and directly with customers to learn more about sources of customer effort and customer pain points.

Guidance Derived from National Australia Bank Best Practice

- ☐ Have reps (in their downtime) outbound call customers who indicate having a poor service experience on a survey.
- ☐ Train reps on basic root cause analysis to meaningfully gather feedback from customers.
- ☐ Resolve outstanding customer issues prior to capturing any customer feedback during the outbound call.

Guidance Derived from Ameriprise Best Practice

- ☐ Have reps explicitly note instances where they cannot fulfill customer requests because of policy (i.e., "capture the no's").
- ☐ Prioritize potential improvement areas based on customer impact and ease of change; communicate to internal partners using the customer data.

Guidance Derived from Fidelity Investments Best Practice

- ☐ Have reps ask customers if they attempted self-service before calling; if yes, ask what inhibited online resolution.
- ☐ Share channel-switching data and cost implications with Web team; highlight quick win Web improvements.
- ☐ Have analysts categorize the top reasons for channel-switching and their associated issue types. Use this information to drive Web site improvements.

How CEB Customer Contact Can Help

- Directly network with companies that have mature proactive customer service approaches.
- Conduct a general thought session to discuss how to initiate a proactive service approach in your organization with a CEB Customer Contact Executive Advisor.