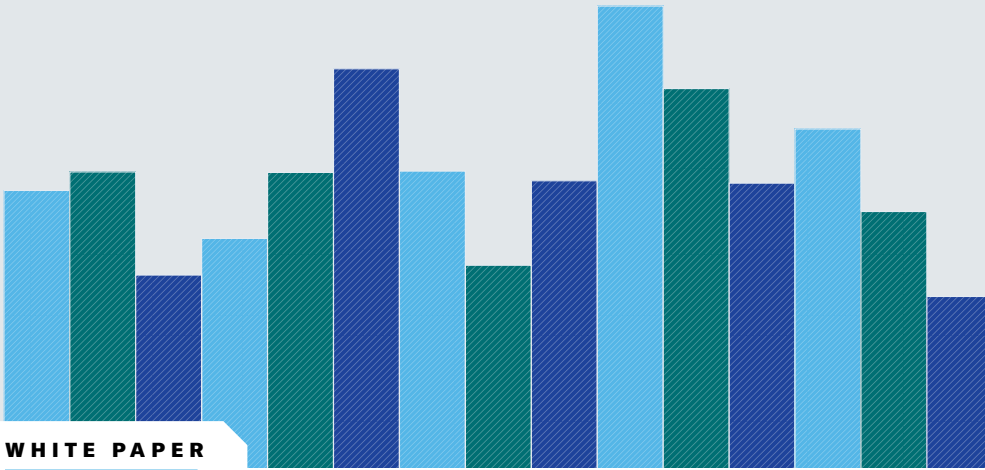




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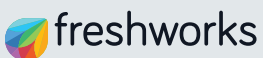


WHITE PAPER

Rethinking Customer Engagement in the Era of Delight



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For most consumer-facing businesses, the customer life cycle is a time-tested regimen: acquire, engage, and retain—activities that often fall squarely in one of two domains: pre-sale or post-sale. As a customer experience (CX) executive, I think it's time to see them as more than just standalone silos.

Historically, customer service has designated customers as support tickets to be resolved as soon as possible. Support teams relied on siloed customer information, and agents had to rely on their own knowledge and grit to help them do their jobs well. The elusive concept of “delivering delight” was treated as transactional and one-off, as opposed to what it should be: a deliberate effort to build loyalty.

Today, the lines between sales and service have permanently diminished. New digital channels like social media and instant messaging are emerging every year, each vying for a piece of the attention economy. According to research cited in this report by Harvard Business Review Analytic Services, customers expect brands to be available on these channels and constantly engage them before, during, and after a sale. Raising a support ticket is the start; the goal is to have meaningful conversations and build long-term relationships with your brand.

This missing link between what is and what can be? Engagement.

Engagement can mean different things to different businesses. If you sell low-priced goods and witness high volumes of website traffic and support queries, you might engage customers using a support infrastructure with bots and artificial intelligence (AI) at its core. On the other hand, businesses dealing in luxury and high-value products might define engagement as providing high levels of personalization throughout the customer journey.

How do you quantify the success of engagement? Executives in support, product, marketing, or operations might view Net Promoter Score and Customer Satisfaction Score as their North Star metrics—metrics that, as stated in this report, depend heavily on how well you employ high-speed messaging channels, AI, and automation to improve CX, agent experiences, and operational costs.


That said, there is no single defined playbook. The only yardstick should be a relentless focus on building positive and purposeful relationships with your customers.

I hope this report, sponsored by Freshworks, encourages you to ask yourself those big-bet questions about your CX roadmap, with the biggest one being, “Am I leaving my customer with a warm, positive feeling after every interaction?”



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Rethinking Customer Engagement in the Era of Delight



In 2020, enforced travel restrictions all but shut down the travel industry and led to months of canceled trips. In 2021, a resurgence of travel planning led to a shortage of flight availability, which snarled airports and caused many headaches. These and several other factors meant the travel industry was one of the most highly impacted industries during the events of the past two and a half years. And at Manchester, U.K.-based Travel Counsellors, a business enabler working with more than 2,000 global travel business owners, that meant a big pivot when it came to how it serves customers.

Each Travel Counsellor is a franchisee running a travel business remotely. The Travel Counsellors (TCs) provide highly personalized travel experiences for their customers.

“During the pandemic, everything ground to a halt. At that time, people dealt with cancellations. The roles of anyone who worked in travel changed,” says Emma Cowsill, a continuous improvement manager with Travel Counsellors. “A few years ago, it was unusual to have Travel Counsellors troubleshoot a booking; obviously that’s changed.”


As Travel Counsellors experienced firsthand, the past two and a half years have required a fundamental change in how many organizations approach customer support and the expectations of their clientele. Businesses have been forced to figure out and accelerate how to serve customers digitally and across multiple channels, and ensure they are doing it effectively and effortlessly. Through these extraordinary circumstances, businesses both established more digital-first capabilities that gave customers the ability to

HIGHLIGHTS

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help themselves through digital channels and utilized agents to serve customers more seamlessly in digital mediums.

It is through these circumstances that the concept of customer delight—when a brand goes above and beyond the expectations of the customer—took on new meaning.

“Continuing to provide a bespoke and personalized service remained a priority for our TCs. When you have the information and the tools that you need to help solve the customer’s problem and they leave the interaction feeling like it was a positive experience, you can do amazing things,” says Cowsill.

Customer delight is a positive feeling the customer has and something the customer experiences when interacting with customer service. But customer delight should not be conflated with rewards and discounts or confused with customer satisfaction. Customer satisfaction simply means that the customer’s needs are met; customer delight requires a business to surpass expectations and even surprise the customer. Customer delight constitutes positive engagement that enables brand loyalty and an overall good feeling about the brand, the product, and service the company offers.

Specifically, customer delight is about meeting customers where they are and quickly and intuitively helping them solve a problem or obtain the information they are looking for. Delight occurs because businesses actively design and think about delivering delight as part of their service. It is a function of personalized and proactive engagement delivered at scale. An effortless experience is positive for both the customer and the agent who services the customer. For agents, it means they exit the experience feeling like they made a difference, providing them with job satisfaction and a morale boost.

But customer delight requires a reexamination given the new demands and customer expectations that have emerged in the past two years, requiring companies to think differently about customer engagement in 2022. This report explores how customer expectations and purchasing habits have changed in recent years and what kinds of tools and strategies companies must look to in order to deliver customer delight in today’s service era.

How Digital Evolved Customer Engagement

In a survey conducted by Needham, Mass.-based research firm IDC in the first year of the pandemic, 23% of consumers reported that they were shopping mostly or entirely online and that this was a change from their pre-pandemic shopping patterns. Respondents also said that they expect to continue to shop primarily online even after the pandemic is behind us, because “[they’ve] grown accustomed to it and prefer it.”

A McKinsey & Co. global survey from October 2020 found that the Covid-19 crisis accelerated the digitization of customer




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and supply chain interactions by three to four years. The report advises businesses to stay competitive in this new business and economic environment by implementing new strategies and practices such as prioritizing building better digital-first engagement with customers and equipping customer-facing agents with tools and strategies to deliver positive experiences.

“When we build new experiences, we shift the way people do business with us,” says Dan Gingiss, a customer experience expert and author of *The Experience Maker*. “Today, almost anytime we buy something, we research it first. Consumers are far more knowledgeable than they were before. Companies need to understand that and support it. They should strive to be the supporters of gaining that knowledge and to provide information in any channel that the customer wants to access it. Customers want convenience and simplicity. The reason their experience then turns into delight is because the company understands how they work.”

With online as the standard first line of interaction with a business, people want to feel valued and special when they make contact. They want the companies they work with and buy from to understand and respond to their individual needs. They want a more meaningful connection with a brand, Gingiss explains.

“Today’s customer wants a relationship with brands they spend money with,” says Gingiss. “That relationship leads to lifetime value. If a company looks at building the experience as not one single transaction but as part of a long-term relationship, it allows them to think differently about how they create the experience.”



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Digital Channels, Messaging, and Social Media

For years, social media has been changing how customers think of customer delight, especially with respect to always-on customer support. But the availability of company customer service on social channels ramped up considerably in recent years, and the new pressures of digital business in 2022 are not only redefining customer delight but also increasing the demands on customer service agents to deliver it across new mediums.

During the pandemic, as social distancing and lockdowns were introduced, many stores were forced to shutter brick-and-mortar operations, and people turned to e-commerce. Many companies scrambled to navigate the new realities of how to engage with customers from afar and get them to buy amid extraordinary circumstances.

“For example, when inventory issues first began, brands could not keep up with updating information online,” says Ginevra Adamoli-Kalbli, digital customer experience director at Epsilon, a New York City-based global advertising and marketing technology company. “What was observed in social media channel listening is there was a lot of complaining. Covid really created a lack of loyalty as brands were trying to figure out how to acquire and retain customers under these new circumstances.”

Savvy companies have also learned how to tie the digital channel experience together and harness social media channels or messaging apps such as WhatsApp and

Apple Business Chat. In addition, consumers are turning to messaging platforms on social media, including Facebook Messenger, and direct messages on Instagram and Twitter. These investments appear to be well worth the dollars, as research from Cambridge, Mass.-based Forrester indicates 68% of consumers say that if they can choose where to make a purchase, they are more likely to go with the business that offers convenient communication.

Meeting Customers on Their Channels of Choice

Customer delight also requires companies to embrace an omnichannel approach that keeps customers up to date through various channels, such as social media and messaging apps. As so much ordering is now done online in the wake of Covid, Adamoli-Kalbli highlights Beaverton, Ore.-based Nike as a company that does a good job of keeping customers in the know about stock and order status. The information is available on the website and on social media, as well as through email if an order is placed.

“You are kept up to date on where your order is from the moment you place it until it is delivered,” she says.

Many young companies also managed to use social media strategically to gain traction and build a new customer base that increasingly wants to engage with brands on social media channels. But a successful social media strategy starts with understanding the audience and who they are,



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notes Adamoli-Kalbli. Gen Z is more inclined to use TikTok, Instagram, and Twitter, for example. Generally, younger, newer companies understand the power of new mediums, according to Adamoli-Kalbli, whereas older, more established companies tend to take longer to find their way onto newer channels. This is a mistake, warns Gingiss, the author, who notes that these companies are missing out on easier ways to serve consumers of all ages.

“Today’s customer doesn’t want to have to email and call,” Gingiss explains. “That’s why many companies are exploring new communication channels, such as SMS [text] and different uses for SMS. There is a conversational element, but it’s asynchronous. It’s self-service. Customers look positively on companies that make it easy to find information or answer their own questions.”

The convenience of social media, messaging apps, and an omnichannel approach enables more efficient customer service experiences. Connecting customers easily with what they need to move on with their day is the ultimate objective, according to Richard Gianvecchio, vice president, operations and process excellence at El Segundo, Calif.-based Saviynt, a security software firm. “As I tell everyone, the most expensive support ticket is the one that didn’t have to happen,” says Gianvecchio. “Our job is to give people peace of mind in the way that they prefer to receive it.”

Agents Lead the Way on Engagement

Customer support agents are, of course, crucial to executing on customer delight. To deliver positive customer experiences, it is vital that agents be engaged, and they must be properly equipped. Agents want to be engaged in solving complex queries rather than fielding low-value queries.

Increasingly, modern tools that use artificial intelligence (AI) can help agents avoid these types of menial tasks. For example, AI-enabled tools can assist agents with categorizing, prioritizing, and routing tickets so they can avoid the time-consuming task of sorting through each. Chatbots can be the first line of defense and can assist with answering simple customer questions, allowing agents to focus on more complex questions.

But having the tools and skills to deliver customer delight also benefits the agent. “Customer service reps are attacked a lot,” says Paul Greenberg, a customer service expert and founder and managing principal of Manassas, Va.-based The 56 Group LLC, an advisory firm focused on customer-facing strategic services. “But with better technology and support logistics, the agent has the kind of system that provides them with the information they need to help the customer. And that means they, too, are going to be better off psychically and emotionally.”

A modern customer experience strategy has engagement at its heart and equips agents to delight customers with a mix of assistive technology, predictive analytics, and intelligent automation. According to Greenberg, training and teaching soft skills such as social awareness and communication are not enough today. It is now essential for agents to be able to navigate databases and other supportive technology quickly. In-depth customer information—as granular as whether a customer prefers to be reached by phone, email, chat, or messaging—must now be at the fingertips of every agent.


According to Judy Duff, fulfillment product management leader at Wayfair, a home goods retailer based in Boston, technology is critical to helping her team members work both smarter and more efficiently. In her role, Duff is focused on customer delight—and her division’s customer is not only the consumer who orders from Wayfair, but also the team member who serves the customer and assists with product fulfillment and delivery.

“When I am thinking about customer delight, I am thinking about the whole person and the whole experience. We want to deliver an informed, delightful delivery experience,” she says. “So, we oversee the tools [that team members] have to deliver value, and we have to be aligned with their users and customer success metrics, as well.”

As an example, Duff says this alignment requires team members to be on top of certain key success indicators, such as the number of items they handle per hour.

“If, in using a new tool, we take up too much time and reduce the number of units per hour, the new tool is going to be a complete failure, no matter how much it does,” she explains. “My work has to respect their metrics.”

In addition to improving efficiency, Duff says Wayfair strives to ensure the tools it gives team members are pleasant and easy to use.



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“If I am going to scan the box, it shouldn’t take six steps,” she says. “[A new tool] also recognizes factors like if they are wearing work gloves. A touch-sensitive tool ensures you can touch it with gloves. We are thinking about the person and the entire interaction rather than just what happens on the screen. ‘You made my job easier’ are the words I most like to hear. People feel better when they can actually do their job.”

Ultimately, supply chain plays an integral role in shaping customer experience. Duff says that the supply chain issues that arose during recent years forced Wayfair to look more closely at how supply chain plays a role in customer delight and how her agents can facilitate that.

“Every aspect of the supply chain contributes to the consumer getting their product on time and in good condition,” she asserts. “All of the tools we offer along the way allow team members to make good on fast delivery promises. We want to make it easy for them to fulfill the order in the right way.”

Data Helps Deliver Delightful Customer Engagement

It should probably come as no surprise that delivering customer delight brings with it multiple benefits for the companies that do it right. Research from Forrester finds companies that lead in customer experience outperform those with less-mature customer experience programs by nearly 80%.

Companies that deliver customer delight can expect to see reduced customer turnover, an increase in customer lifetime value, and more customer loyalty. Simply put, happy customers are cheaper to retain. Gingiss says the benefits of customer delight reach far beyond the initial interaction with the consumer.

“When you create customer delight as a brand, people talk about you,” he says. “For example, I recently had a fun back-and-forth with Skittles on social media. They sent a tweet to every person who had complained about them removing lime from their flavors. They said, ‘We want to apologize for removing lime’ and sent a video individually to every person who complained about removing lime. Now I feel more connected to that brand because I feel they heard me.”

The key in being able to deliver these kinds of experiences—and reap the benefits—is the data and tools that make it possible, says Saviynt’s Gianvecchio. Today more than ever, companies must be attuned to the customer’s situation during the interaction and what the customer is hoping to accomplish by reaching out to customer service.

Often customers have an urgent or distressing matter they want addressed, and they don’t want an agent who is going to make small talk or take up too much of their time. They want to get straight to the point and find a solution.



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“Other times when you interact with customers, you can establish a personal connection,” he says. “Know if there are times to make a connection and when it’s time to get right to the work.”

According to Gianvecchio, that knowledge is rooted in having access to, and effectively applying, relevant data. Data that includes records of previous customer interactions, as well as purchase or service history, allows agents to efficiently access key information and quickly get to the heart of the issue the customer is calling about.


“It is more about how we match them with knowledge than fixing things. Most of these systems are about having the right database,” he says. “How do you extract from it, and what do you do with it? A team with bad tools is going to have a tough time doing that job.”

Conclusion

Whether customers are coming to a company for help troubleshooting an issue or because they simply want information to make a purchasing decision, customer support is a must. Making it a delightful experience is where the magic happens, Gianvecchio asserts.

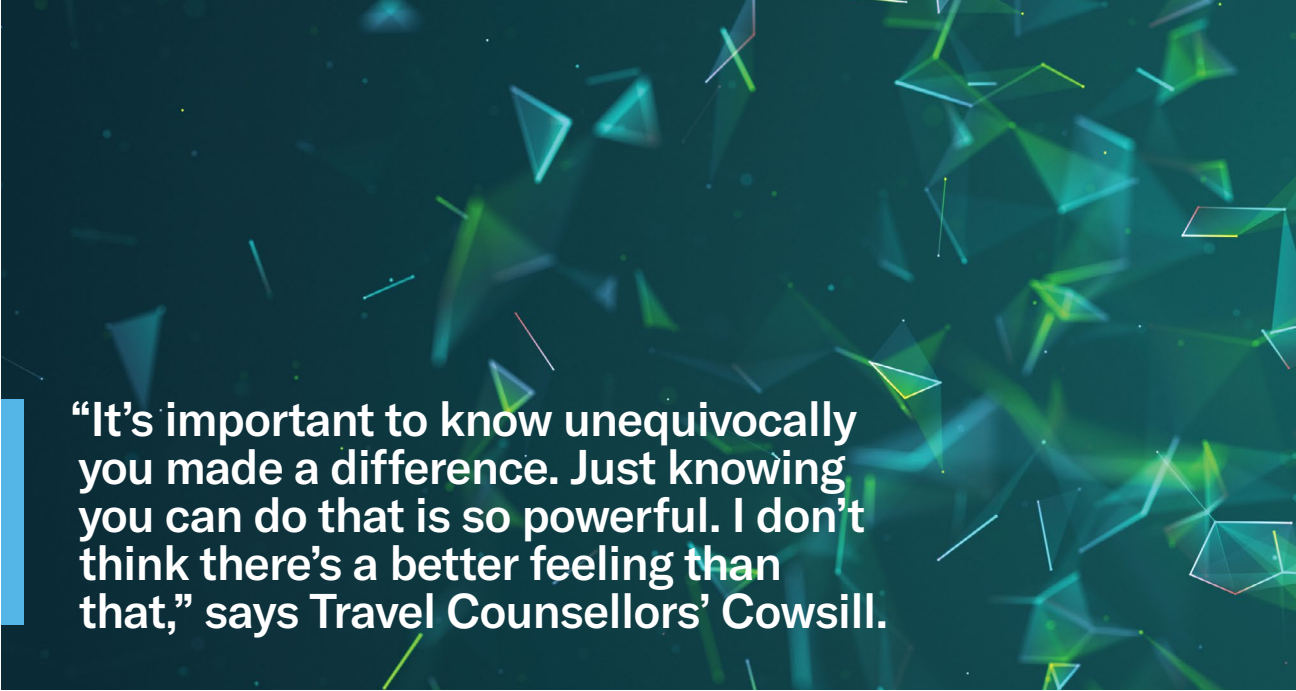
“I believe support is a differentiator,” he says. “If your support person knows you, knows your history, then they are better prepared to deliver information at the time you need it.”

But even with technological advancements and company investments, many organizations still struggle to make things easy for their customers. Interacting with an organization becomes much easier when customers can reach it through any channel they want, whether that is social media like



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Instagram or Twitter, or via email or phone. It’s easy when agents don’t have to switch between many screens to assist a customer and already have a body of knowledge to draw upon to help an existing customer have a more intuitive experience. All of this leads to a more seamless experience, with the ultimate goal of an effortless interaction—which leads to customer delight.

Travel Counsellors’ Cowsill points to the tools it uses to give its workers a solid knowledge base and a way of documenting previous interactions with customers as the key to the company’s success in making things easy for the customer and delivering delight. “It enables us to capture data we never had before,” she explains. “And with that data, we then see the commonly asked questions, the things that

we should be able to self-serve, and we were able to build a process from that.”

Cowsill believes customer delight occurs when agents, referred to as colleagues at Travel Counsellors, are given the space to take away high-volume, low-value tasks in order to focus on more complex tasks. It’s about clearing away the clutter to focus on solving the problem or answering the question at hand. The outcome is a customer who feels seen and helped and colleagues who know that what they do matters and therefore demonstrate to their customers that they really do care.

“It’s important to know unequivocally you made a difference. Just knowing you can do that is so powerful,” Cowsill says. “I don’t think there’s a better feeling than that.”



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