5 STEPS TO CREATING PERSONALIZED CUSTOMER EXPERIENCES

Customer service is the current competitive arena. The secret to winning? Personalized experiences.

By: Phillip Yeich and Frank Tersigni

Customers want to be more than a number. They want companies to quickly recognize who they are, anticipate what they want, and solve their problems quickly. And they want this recognition to extend across any interaction they have with a business—whether it's phone, email, chat, SMS, or social media.

Fortunately, they've also grown increasingly comfortable with companies collecting their personal data, as long as it's used to improve their experience. And 75% of customers are willing to spend more to buy from companies that give them a good customer experience, according to a recent Zendesk report.

Customer service is the current competitive arena. Happy customers will lead to trust, loyalty, and increased revenue. The secret to winning? Personalized experiences. ConvergeOne executives Phillip Yeich and Frank Tersigni outline five key steps to creating them.

1. Immediately recognize your customer when they contact you

This may seem basic, but too often, a customer must run through a laundry list of information to identify themselves to customer service agents. And if they've been transferred to more than one agent, the potentially worst words for them to hear are, "How may I help you?" That's because most likely, the customer has already gone through the process of explaining who they are and what they need, whether that be via an interaction into the contact center or time spent on the company website — a frustrating and time-consuming endeavor.

A better way? Implement voice, facial, or fingerprint recognition technology to automatically know which customer is calling, why they are calling, and where they have already navigated in a particular transaction. If they are transferred or are looking for agent assistance, their identity and current data go with that transfer. This way, you're treating people not as the next number in line, but as real people.

2. Know what your customer really wants

Once a customer has been identified, it's important to know what a person wants — whether that's derived from various customer data points or based on a person's perusing a particular topic on your website. This can feel somewhat Big Brother-ish, but if done correctly and with privacy in mind, companies can build a dynamically unique experience just for that customer. This is far better than forcing a customer to wade through an IVR menu with endless prompts to get help for a certain problem.

3. Pay attention to now

While there's a growing push to understand the "customer journey," or the entire lifetime history of a customer, a customer's history may not have any relevance to why he is calling you today. Perhaps a banking customer is conducting online searches for auto loan rates. This data gives an agent the opportunity to be specific in her interactions with the customer, asking if the person is inquiring about financing or purchasing a new vehicle—versus just asking how she can help. By zeroing in on the specific nature of a person's call, you're providing a personalized experience.

4. Use data to anticipate problems before the customer sees them

Wherever possible, use data to predict and identify a problem in advance and then reach out to customers before they even know it's an issue. A hospital might send a text message to all elderly patients who haven't gotten a vaccine yet, providing guidance on how to get one. Or a cell phone company might see a potential problem in service and reach out to schedule a fix—before a customer even knows something might be wrong. Customers love it: They did nothing and they got great service.

5. Be consistent across every communication channel

A truly personalized experience can only be achieved if customer data and conversations are shared across all contact channels. A customer who talks to a call center agent on Monday should be able to continue that conversation via web chat the next day with no hiccups. That continuity is vital to improving service and making people feel valued.

Yet accomplishing those steps can be challenging without guidance and the right technology. Most companies use a wide variety of platforms and software for their customer interactions, leading to hodge-podge systems that don't always communicate with each other. That's why ConvergeOne created C1 Conversations, a new platform-as-a-service that integrates customer engagement applications. Cost-effective and agile, C1 Conversations culls data across all channels and websites to ensure consistent conversations, biometric identification, and artificial intelligence to anticipate customer needs.

By knowing your customers beyond merely just another number in the queue, and anticipating what they want, focusing on the present issues, and anticipating problems before they happen —you can create personalized experiences that elevate your company above the rest. And if achieved across all support channels, it will drive loyalty, satisfaction, and ultimately long-term revenue.