

# ***FIVE STEPS*** to master digital customer engagement



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## Why digital customer engagement is essential now

Digital customer engagement is evolving quickly.

According to a 2020 survey from McKinsey & Company, consumers' rate of digital adoption accelerated by three to four years in just over a few months.<sup>1</sup> The same study estimates companies accelerated their digital transformations by a seven-year increase. It's no wonder businesses are responding at astonishing speeds — they're following the money. This year, customers will spend 25% more with companies that get digital transformation right.<sup>2</sup>

Digital channels like web chat, social messaging apps and chatbots hold tremendous potential for customer engagement and support. And while there's great appetite for them from both customers and businesses, customer experience leaders often feel they've yet to realize the full potential of these digital channels.

Whether you want to add new digital channels or get the most from channels you've already deployed, this ebook details five steps you can take on your journey to master digital engagement.

<sup>1</sup> 2020 McKinsey Global Survey of executives

<sup>2</sup> IDC FutureScape: Worldwide Future of Customer and Consumer 2021 Predictions

## STEP 1

# Craft your vision

You've got seven minutes until that next video meeting. Your inbox is full. The laundry needs to be folded and your dog is barking at the delivery driver. Been there. Believe it or not, this might be the perfect time to quiet the noise and rise above the details. To create masterful digital experiences, you need to start with a vision.

Your organization's digital customer engagement vision should be aspirational and directional. Allow room to grow into it. Imagine how you want customers to engage with your business and how you want your team to be equipped to respond — not just this year, but two to five years from now.

You may already have a defined vision statement for digital customer engagement. It might even be part of a larger digital transformation initiative at the organization level. If it provides the big picture you need, great! You're a step ahead. If you need more definition or detail, go ahead and capture it.

## PRO TIP:

The earlier you think about a connected experience across your digital channels, the easier it is to create. This is especially true if your vision includes using artificial intelligence (AI) and automation within your digital channels.

## STEP 2

# Determine your starting point

Now that your vision is defined, select a digital engagement channel to start using or optimizing. Be strategic about this. It also pays to be forward-looking with your selection. As consumer adoption of digital channels sped up last year, you may find that your customers' preferences have shifted.

If you want to add a new channel, choose one that matches your customers' needs and your business needs. If one of your goals is to resolve simple inquiries on a digital channel instead of a phone call, evaluate the nature of your most common calls and frequently asked questions. If customers need a response right away, you might want to consider chat. If they're happy to wait a couple hours, maybe messaging or email will work. And think about using bots for very standard, repetitive inquiries.

If you want to optimize a channel you've already deployed, you can take a couple of approaches. You could advance a channel that is going well by adding functionality or promoting it more heavily. Or you could focus on an engagement channel that's underperforming. Then make some improvements to get more out of it.

### **PRO TIP:**

Don't get caught up in chasing the newest channel. This is the time to be selective. You know your business and your customers best. Use your understanding of your industry, geography, target audience, and the products or services you offer to guide your selection. You can also evaluate your competitors' presence on digital channels and decide how you want to differentiate yours.

### STEP 3



## Get your stakeholders on board

The rapid acceleration of digital adoption should make this step easier: Get the all-clear to move forward. Identify your key stakeholders and socialize your vision and initial plans.

### If you're adding a new channel

Determine if your customer experience software already gives you access to the channel you selected. If not, and you'll need to invest in new technology to support this channel, start putting together your business case. Use this as an opportunity to validate your channel choice and secure the resources you'll need to deploy it.

### If you're optimizing an existing channel

Gather data from your experience so far. Look at the volume of engagements you handle on this channel, the typical types of inquiries addressed, performance against key metrics, and where and how customers are encouraged to use the channel. As you do your discovery, take note of internal experts. You'll want those who are using the tool most frequently and most successfully to help advance its use.

### PRO TIP:

Take a cue from your company's culture and procurement policies. If you're evaluating new technology and you anticipate there will be an involved proposal or procurement process, keep your long-term vision in mind. You'll likely see more value and speed with an all-in-one contact center solution that lets you rapidly deploy more than one digital channel, rather than point solutions.

## STEP 4

# Establish your channel foundation

Before you skip it — this step is worth reading, even if you've already launched the digital channel you want to optimize. If companies are struggling with channel adoption or performance, often it's because they tried to run too soon. These tips will help you establish a solid foundation on any digital customer engagement channel.

### Start with a narrow scope

Don't try to route every conversation to your new channel. Choose your goals and use cases wisely. Tackle interactions like frequently asked questions and simple transactions with a new digital channel. Work with your team to identify those and make your new preferred channel easily accessible to customers in those scenarios.

### Determine how you'll measure success

As you add more digital channels, look beyond traditional call center metrics to understand how those channels are performing. For example, speed-to-resolution is no longer a good measure of agent success in an asynchronous interaction that stops and starts over a 72-hour period. Offer post-interaction surveys to get customer feedback on how you're doing — and be prepared to really listen and act on it.

### PRO TIP:

Train for the channel. When we ask customers if they would do anything differently a second time around, this is a common response. Even experienced teams and rockstar agents benefit from tips on how to engage customers through a new channel. Provide guidance for managing a queue with mixed interaction types, juggling multiple conversations. And understand what a great experience on the new channel should look or sound like.

## STEP 5

# Expand your comfort zone

Once your channel foundation is solid, you're ready to kick things up a notch.

### Connect across channels

Companies see the most success with digital engagement channels through a blended approach. This allows you to not just leverage channels like messaging or bots, but to connect your customer experience platform with essential systems like your CRM and collaboration tools.

### Turn up the volume

Encourage wider adoption of an already successful channel by cross-promoting it from other channels. For example, add a message on your IVR that says, "Did you know you could contact us over WhatsApp?" You can also feature the channel more prominently on your company's digital properties. Widen the scope even further by partnering with your sales and marketing teams to extend the channel beyond customer support.

### Add smart automation

If you were looking for this one, you're not alone. AI has huge potential. It's also last on this list for a reason: AI is most powerful when your engagement channels are connected, and your data is structured and accessible. Once these pieces are in place, you can see incredible value from tools like predictive engagement, sentiment analysis, real-time assistance for agents, and automated forecasting and scheduling. This is one reason why it's important to build a solid foundation first.

### PRO TIP:

This applies to all three expansion tactics: Form a plan for smooth transfers. Recent data tells us customers don't mind using multiple channels to get the job done. But they do want to be heard, remembered and understood. Make it easy to move from a digital engagement to a phone call if it will provide the best experience.

## Dive deeper into each channel

You can apply these five steps to each digital channel you explore. They're repeatable. And it should get easier each time — especially the final step — as your approach becomes more blended.

Of course, there are detailed tactics and nuances for each channel. We've got you covered. Discover how to walk, run and fly with web messaging, messaging apps and bots — and learn how to connect them for seamless experiences. Our new series of practical guides will have you mastering these digital channels in no time.

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