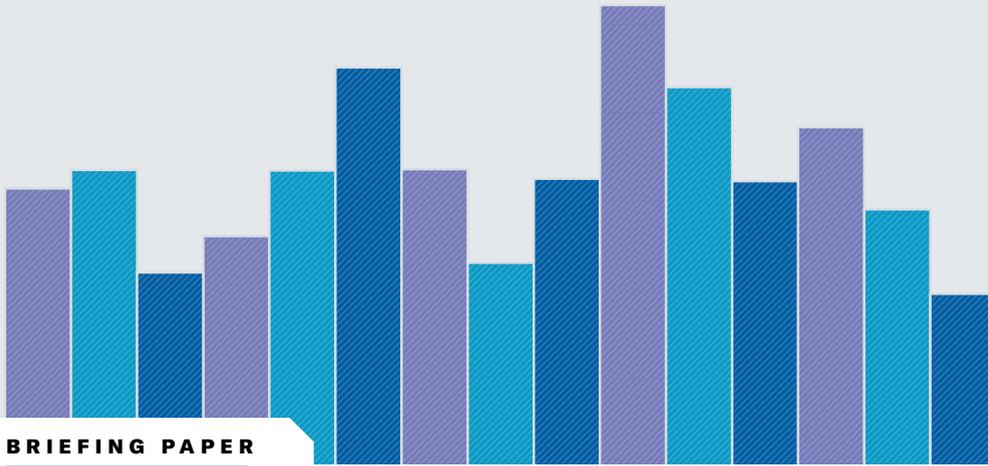




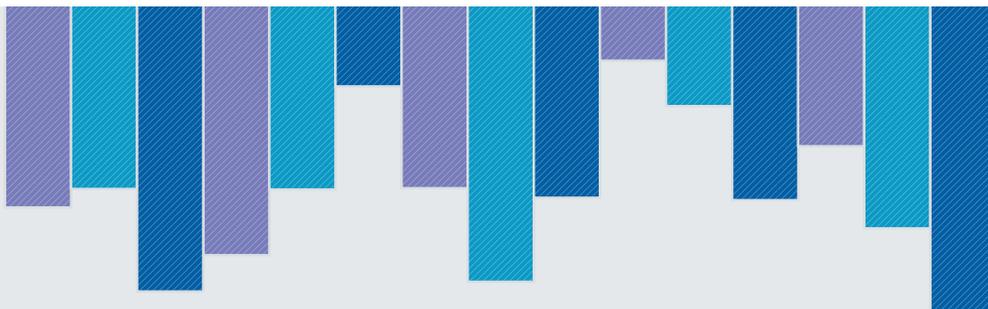
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ANALYTIC SERVICES



**BRIEFING PAPER**

# Using Tools and Data Better to Improve the Customer Experience in Contact Centers



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# Using Tools and Data Better to Improve the Customer Experience in Contact Centers

Contact centers are on the front lines of the most urgent customer interactions as customers seek assistance for matters too complex to handle on their own. By the time they do call, they might already be frustrated—a problem that is compounded if the agent has an incomplete view of their needs and asks questions the customer thinks the company should already know.

To provide a superior customer experience (CX), contact centers must have a platform offering a shared, easy-to-understand, always accessible 360-degree view of the customer that supports cross-channel engagement and real-time personalization. This fuller picture allows service teams to delight customers by responding quickly with up-to-the-minute information. Contact centers can also use the 360-degree view—the complete view of the customer’s interactions with their business—to interact more efficiently with other departments, such as field service, sales, and marketing, that play a key part in shaping the customer experience.

As contact centers look to the future, they are prioritizing strategies to make customer-centricity their driving force. Objectives like customer satisfaction and collecting and acting on customer feedback will be more important by 2025 for the vast majority of contact centers, according to a October 2020 survey of executives responsible for customer experience by *Customer Contact Week Digital*. **FIGURE 1**

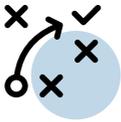
Tellingly, all these priorities relate to using data more effectively and gaining a better understanding of the customer. Contact centers seek the much sought-after 360-degree view of the customer, where all of an individual’s pertinent data can be easily pulled together from across the company in a comprehensive, easy-to-digest manner.

## HIGHLIGHTS

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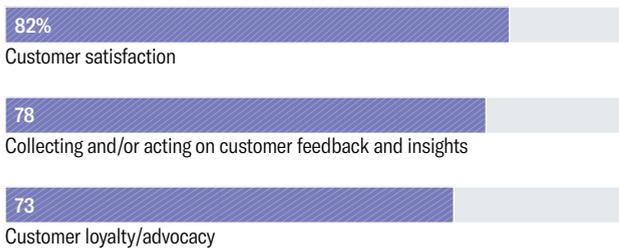
Contact centers, which have the most experience in dealing with omnichannel encounters on a minute-by-minute basis, “can be the organizing principle for dealing with the multiple-channel experience,” says Andy Haas at Deloitte Consulting.

FIGURE 1

### Becoming Customer-Centric

Customer satisfaction ranked highest in importance for contact centers in 2025.

As you look toward 2025, will these objectives be more or less important to the contact center? [PERCENTAGE ANSWERING “MORE IMPORTANT”]



Source: Customer Contact Weekly Digital, October 2020

“The aspiration of having a 360[-degree] view of customers has been there for a long time,” says Andy Haas, managing director with Deloitte Consulting LLP and leader of Deloitte Digital’s service transformation practice. “In practicality, there hasn’t been a lot of progress toward this goal for an equally long time. However, that has changed in the last 12 to 18 months, and the ability to gain a more complete view of the customer has accelerated significantly.”

This change is due in large part to major advancements in cloud-based capabilities, which provide a foundational basis on which to realize the full value of the data stores. The Covid-19 pandemic has accentuated the need for more flexible approaches as companies grapple with customers who demand more from digital channels and contact-center agents who need new ways of working.

“The employee experience has never been more important,” Haas says. “Companies are using new tools, new measures, and tinkering with staffing models to increase contact-center employees’ satisfaction, which enables them to make the customer more satisfied.”

### Customer Experience Outweighs Costs

As its value becomes more apparent, the customer experience has become paramount across all aspects of enterprises. “The experience market has never been more tangible,” Haas says. “Many companies had an aspiration to improve the customer experience, but cost outweighed experience as a priority. As more knowledge is applied to experience, we can map experiential outcomes to tangible values, like revenue protection and reducing churn.”

Like most departments, contact centers have historically operated in data and process silos. Many gathered mounds of data but did not aggregate it in a systematic way so it could be shared with other functions. A growing number of companies have realized that data silos impede contact centers from delivering the personalized service that customers demand.

When properly used, contact-center data provides vast opportunities and insights for enterprises. Steven Van Belleghem, co-founder of the Belgium consultancy Nexxworks, points to Smartphoto, a European company that lets consumers upload pictures and information and turns them into handsome photo books. The company’s contact center noticed that a number of customers were upset that their photo books were marred by typos the customers had input into the books when uploading their material. The contact center could do nothing but have customers reorder and pay for a new book.

“People didn’t want to spend 150 euros on another book, but their memory was ruined,” Van Belleghem says. Based on the contact-center input, the company decided to offer customers a free replacement. The relatively small cost generated huge loyalty—and excellent word of mouth—which translates into more revenue in the long term.

“The contact center is really the friction hunter in your company,” Van Belleghem says. “You should leverage their knowledge and data to rethink processes.”

Until recently, many companies had optimized individual channels and used each channel in isolation to deal with customers. Contact centers, which have the most experience in dealing with omnichannel encounters on a minute-by-minute basis, “can be the organizing principle for dealing with the multiple-channel experience,” Haas says.

Information about a customer issue delivered through a chatbot, for instance, must be easily shareable with a



**With customer experience a top business priority, it's critical that contact centers become connectors, friction removers, and places where answers and empathy are readily available.**

contact-center agent, and then just as seamlessly relayed to mobile workers who are dispatched to deal with that issue in the field.

“Field service that is disconnected from the contact center is a massive source of customer dissatisfaction, a cost driver, and a churn driver,” Haas says. “In the past, companies have not thought about the servicing component until a product was already out the door. Now they realize that the downstream servicing drives ongoing profitability.”

### **Meeting the Customers Where They Are**

Contact centers can ease frustration—or create it. With customer experience a top business priority, it's critical that contact centers become connectors, friction removers, and places where answers and empathy are readily available.

Consider Benefitfocus, a cloud-based software solution for health care and benefits administrators whose customers include employers, health plans and brokers, and the employees and consumers who use its benefits. This group of customers has diverse needs, but the common denominator is that they are concerned about services that are fundamental to people's lives, and that they often use at some of the most difficult moments of their lives.

“Benefits are difficult and complex to understand,” says Annmarie Fini, executive vice president of customer success for Benefitfocus. “Often, people don't know what they need until they are trying to manage a health care situation.”

During most of the year, the company has a few hundred agents in its contact center, which it labels “the service center.” During enrollment periods, when consumers are selecting their health plans, the number of agents can swell to over 1,000, each handling delicate, extremely personal inquiries.

“A customer who is calling us has a unique situation happening in their lives,” Fini says. “They want an empathetic conversation and someone who truly understands their situation and their benefit plan. Every company that we represent has individual aspects to their plans, so agents have to understand a lot of information that is unique to each employer.”

In sectors as varied as finance, health care, utilities, and retail, the pandemic has upped the ante on more personalized experiences, requiring empathetic agents who have pertinent customer information at the ready to deal with any issue. That empathy is also data driven, because the data provides the insights into how to best assist customers at every stage of their journey in any channel. By having a complete view of the customers, contact centers can become proactive, resolving issues before the customer even reaches out to them.

“We can anticipate a great deal about what a member is calling about because of the data,” Fini says. “For a few years, we have been on a journey to understand the customer journey better. The tools have evolved to help us make a better experience in every channel the customers use.”



“Many customers have self-service needs. They want to go to a mobile app or a web page, and search for what they want, and get the exact same information they would on the phone,” says Anmarie Fini at Benefitfocus.

The many channels customers use to reach contact centers are part of an evolving and complex equation. Some 58% of customers prefer to solve urgent issues by phoning the contact center, according to Accenture’s Keep Me Index/Moments That Matter study, conducted in 2019. A similar number said phone is their preferred channel to ask, explain, reason with, or negotiate with customer service.

At the same time, digital channels will play an increasing role in contact centers, though opinions vary as to which channels will be best suited to various needs. “If you bump your car fender, you’re fine about filling out a form online,” Van Bellegem says. “If your house burns down, you want to talk to a human being right away.” **FIGURE 2**

The upshot is that companies need diverse access points for customers and to share data seamlessly among these channels. Fini says customers have to be met where they want to be met. “Many customers have self-service needs,” she says. “They want to go to a mobile app or a web page,

and search for what they want, and get the exact same information they would on the phone. People want the fastest path to the information they want.”

Benefitfocus continuously looks for ways to provide customers with the most efficient communication mechanism. The company moved its chat widget to a more prominent location on its web page, enabling the chat icon to scroll with the user.

“Before, chat was in the header or footer of the experience,” Fini says. “You needed to click on a link to open up the chat, so it was not as noticeable. We have embedded it in the experience so it pops open automatically.”

In addition, the chat capability now follows the customers (and remains visible) as they navigate within the benefits platform. This capability has made it much easier for customers to connect via the chat channel, regardless of their location. These actions have had a significant impact:

- Chat adoption increased four to five times year over year.
- Customers engaged in 40,000 more chats.
- Chatbots have been used to support more than 12,000 chats after hours.
- The average “handle time,” the time an agent chats with a customer, improved by 90 seconds, delivering a more efficient experience through the customers’ channel of choice.

For Benefitfocus, such success is dictated by customer experience. “We are working on having artificial intelligence [AI] and bot interactions be helpful and empathic, without coming across as the same answer for everyone,” Fini says. “The ultimate goal is to have a great experience for everyone, no matter how you accomplish it.”

## Deeper Human Interactions

For all the talk of contact-center technology, the irony is that this technology is promoting deeper human interactions.

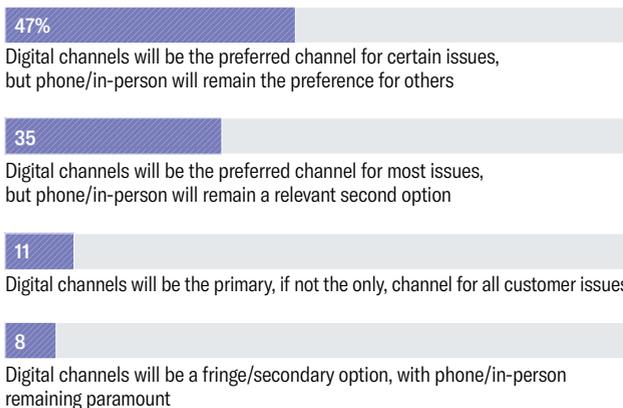
“People wanted to have more of an empathic conversation,” Fini says. “During the pandemic, we saw it was more important for agents to have a great conversation with people, which fully answered all their customers questions, rather than the quantity of contacts an agent had. People are more flexible than in the past. If an agent had a dog barking in the

FIGURE 2

### Digital Channels’ Increasing Role

Nearly half of all respondents feel digital channels will be the preferred go-to venue for customers.

What role do you see digital channels playing in the future of the contact center?



Source: Customer Contact Weekly Digital, October 2020





**With customers increasingly addressing easier contact-center issues with self-service tools, agents have been called on to deal with more complex and nuanced matters.**

background, they would laugh about it rather than think it was unprofessional.”

Along those lines, contact-center agents and frontline mobile workers feel more empowered and satisfied when they have the tools and knowledge to do their jobs most effectively.

As a result, Haas says, companies realized that AI in contact centers is not just about automating chatbots to handle customer issues; it’s also about providing more intelligent help to agents—such as useful information or actionable insights—to make their interactions with customers more pleasant and effective on both sides.

This help for agents was certainly the emphasis for Benefitfocus. The company added a searchable knowledge-base center within its customer-relationship management tool to eliminate the need for agents to search across multiple tools. It also implemented a Google-like search feature that indexes its knowledge base and enables agents to search keywords and phrases to locate customer resolutions.

These actions improved average handle time by 27 seconds during the open-enrollment period, when call volumes are at the highest, while streamlining agents’ workflows with an average of 10 fewer clicks. This increased efficiency underscores the importance of automated business processes and workflows, which can reduce those clicks even more.

With customers increasingly addressing easier contact-center issues with self-service tools, agents have been called on to deal with more complex and nuanced

matters. “Contact-center agents still have to handle the unknown unknowns,” says Kate Leggett, an analyst with Forrester Research.

One national homewares retailer hired contact-center agents who had knowledge in home decoration because customer questions would often concern matching colors. And contact-center agents at a tax-software company adopted the roles of software engineers and accountants because callers needed such expertise.

Often, contact-center agents now have screens to share information with other experts around the company. “The customer experience is created by controlling the data flow from the moment the customer calls in to the final resolution of their issue,” Leggett says. A contact center can sometimes solve issues, but at other times, it acts as a coordinator that brings other departments into the matter.

“Field service is really an extension of the contact center,” Leggett says. “The contact center goes through triage and solves the knowledge-based stuff, and then rolls a truck out to the field for more extreme issues. The successful companies have a seamless transition from the contact center to the dispatcher to the field-service worker. If you have siloed data and the customer has to repeat themselves to the on-site worker, the customer just gets frustrated.”

Indeed, lack of information about service history—an issue fundamentally about disconnected data—is the main frustration customers have with contact centers, according to the CallMiner Churn Index 2020, a survey of 2,000 U.K.



**90%**

**of customers said a good experience with a contact center will reinforce their loyalty—yet another indication of the criticality of the customer experience.**

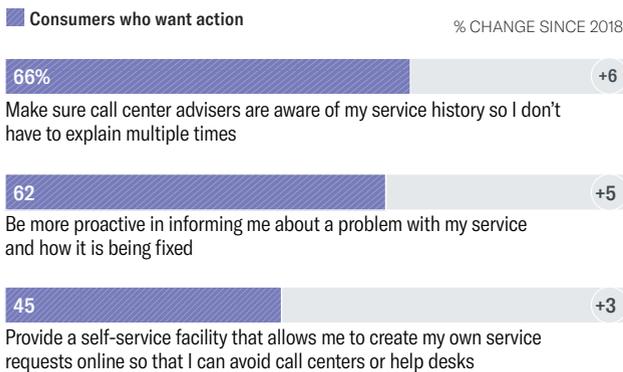


Contact centers can be places of intimate connections and intense human interactions, which require empathy and compassion, technology, and data.

FIGURE 3

### Instilling Loyalty

Arming call center advisers with more service data is what customers crave most.



Source: CallMiner Inc., May 2020

adults by speech analytics firm CallMiner Inc. released in May 2020. The desire of customers for companies to know them better has grown over the past two years, the survey found. **FIGURE 3**

Addressing customer needs is critical because frustrated customers can quickly become former customers. Some 74% of customers switch companies after a bad contact-center experience, the survey found. However, 90% of customers said a good experience with a contact center will reinforce their loyalty—yet another indication of the criticality of the customer experience.

### Conclusion

Contact centers, which play a central role in forging the customer experience, are taking a leading role in building data-driven cultures across all industries. Rapid technology advances are being applied to contact centers with an eye toward customer-centric metrics as well as traditional efficiency key performance indicators.

For example, Benefitfocus created a clear roadmap delineating the capabilities to prioritize in its service center. “My biggest advice is to make your CIO your best friend and have a cohesive understanding of what your system can do today and what you want it to do in the future,” Fini says.

Like most contact-center leaders, Benefitfocus carefully balances automation with humanity. It conducts extensive pilot programs to provide agents with different views of information and track how well they can answer questions. “The biggest challenge is integrating all the information you need to have the full picture of the customer, without overwhelming the contact center with too much information,” Fini says.

The delicate balance requires applying vast stores of data more adroitly and using that data to make stronger connections across the organization. Contact centers can be places of intimate connections and intense human interactions, which require empathy and compassion, technology, and data.

“The industry leaders are investing more in the cloud as a foundational element of their contact centers,” Haas says. “By moving away from their legacy technology, they are developing the flexibility and capacities to serve customers in the way they want to be served, positioning themselves as omnichannel leaders for the future.”



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