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HOW TO IMPROVE EXPERIENCE AND PERFORMANCE WITH CUSTOMER JOURNEYS

The contact center leader's guide
to journey-based omnichannel optimization

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Introduction

If you're like most contact center leaders, you have separate platforms or tools to measure voice, chat and IVR. The owner of each typically monitors and optimizes their respective channel, hoping this improves overall performance.

But when it comes to understanding how contact center interactions impact customer satisfaction and experience, it's up to you to figure it out. Plus, you need to show the C-suite how your contact center initiatives will affect business objectives like customer retention, cost to serve and revenue growth.

The need to improve measurement across all service channels has never been greater. Measuring omnichannel experiences is key to identifying the drivers of poor experiences and quantifying the impact of contact center experiences on business outcomes.

In this ebook, you'll learn how using a journey-based measurement approach enables you to achieve your business goals and improve performance while increasing customer and employee satisfaction.

WHY IT'S TIME FOR A NEW APPROACH

Contact center leaders typically measure the performance of each channel independently

Traditionally, the owners of service channels, such as voice, chat and IVR, work independently. They leverage channel-specific systems to measure and optimize touchpoints to hit their metrics.

But while measuring your channels independently can tell you how a single touchpoint is performing, it can't explain how an interaction in one channel impacts another channel or your customer's overall experience with your contact center.

For example, let's say average handle time (AHT) in the voice channel is increasing. It's easy to assume agent training needs improvement.

But the problem might lie in the IVR, chat or another channel entirely beyond the contact center. Perhaps abandonment is increasing for chat and self-service rates are slipping overall. This indicates your customers' needs aren't being met in other service channels. Your time is better spent optimizing chat and IVR rather than agent training.
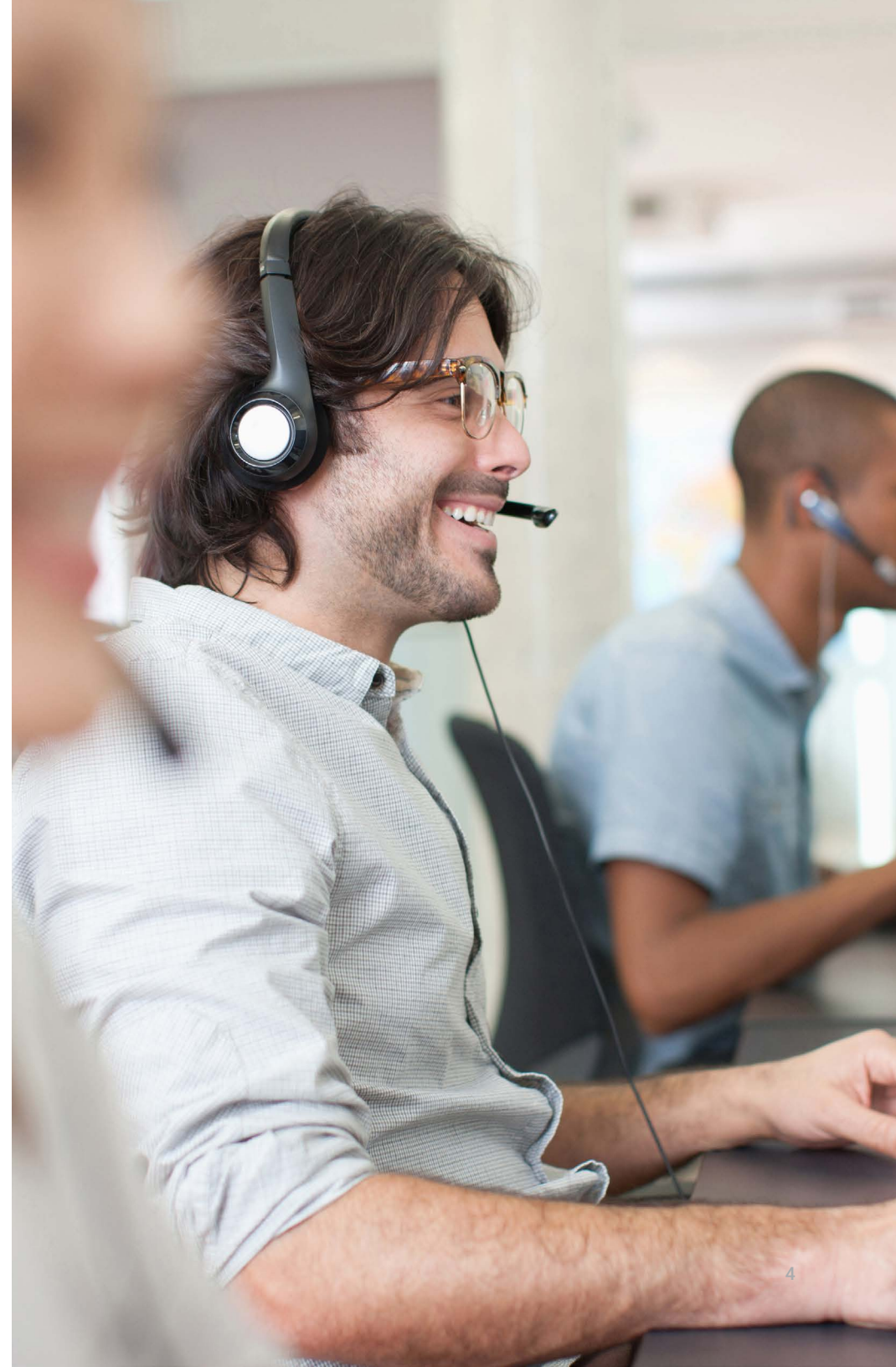
Hiring more analysts is a temporary fix

Some leaders solve their measurement woes by hiring more analysts to look at data across systems and try to understand why:

- Customers exit self-service channels
- Customers contact you
- Problems aren't resolved efficiently

But often, the analysts can't keep up with the continuously increasing demand for answers. The required data must be identified, extracted and transformed, so it takes a lot of time to address each request.

Plus, you end up increasing overhead and struggling to prove your ROI.

Your agents need information in real time to give customers the best possible experience. If you don't optimize contact center measurement, you'll continue with the status quo — delivering frustrating, disconnected experiences that lower customer satisfaction (CSAT) and affect employee turnover.

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WHAT'S AT STAKE: CUSTOMER AND EMPLOYEE EXPERIENCES

Customers expect efficient, empathetic experiences — regardless of channel

Your customers become frustrated when they must repeatedly explain their needs.

Whether they interact with digital or live agents, customers expect those agents to understand their needs and prior experience — the actions they've already taken and the emotions they've felt.

To meet customer expectations, you need visibility across service channels. Asking customers to repeat their name, phone number and the reason they're calling is no longer acceptable.

That's why monitoring and measuring cross-channel experiences is critical. Your agents need visibility into customers' current goals and prior experiences, or you risk frustrating them. And that affects satisfaction, retention, revenue and profits.

"More than 70% of consumers believe that companies should collaborate on their behalf so they don't have to repeat information to different representatives."

Customer Experience Trends Report, Zendesk, 2020

Employee and customer experience is on the line

Monitoring and measuring cross-channel customer behavior is crucial.

Unfortunately, most agents don't feel equipped to handle customer interactions effectively and efficiently. This hurts contact center performance in two critical ways:

1. Customer satisfaction:

Customers are easily frustrated when agents can't solve their issues quickly. Ninety percent of consumers worldwide consider issue resolution their most crucial customer service concern.

2. Employee satisfaction:

Agents who feel they lack the information and tools to perform their jobs are more likely to feel dissatisfied. Feeling overwhelmed and frustrated can easily lead to an increase in agent turnover, something most enterprises can't afford.

"Agent job satisfaction (along with first contact resolution rate) *drives* customer satisfaction; it drives agent turnover, and it *drives* agent absenteeism."

Employee Engagement in the Contact Center:
Metrics and Drivers,
ICMI, 2019

A BETTER WAY TO MEASURE CONTACT CENTER EXPERIENCE AND PERFORMANCE

Customer journeys enable better measurement and experiences

According to Microsoft, [49% of consumers use three to five](#) different communication channels to contact customer service. The need to evolve from single to omnichannel measurement and optimization is more urgent than ever. That's why contact center leaders are adopting journey-centric measurement approaches.

Measuring customer journeys means changing your mindset to see things from the customer perspective. Rather than tracking performance in individual channels, you measure how customers engage to achieve specific goals — regardless of which channel they choose at any point in time.

Customer journeys are the steps consumers must take to achieve a goal, such as transferring money or moving Wi-Fi service to a new address. This allows everyone — from channel managers to agents to contact center executives — to understand:

- The goals customers want to accomplish when they reach the contact center

- The paths individual customers took to reach (or not reach) their goals

Providing agents with each customer's unique context empowers them to serve customers with empathy. This makes both your customers and employees more satisfied which, of course, affects overall performance.

CUSTOMER JOURNEY

noun

1. A sequence of steps to achieve a customer goal
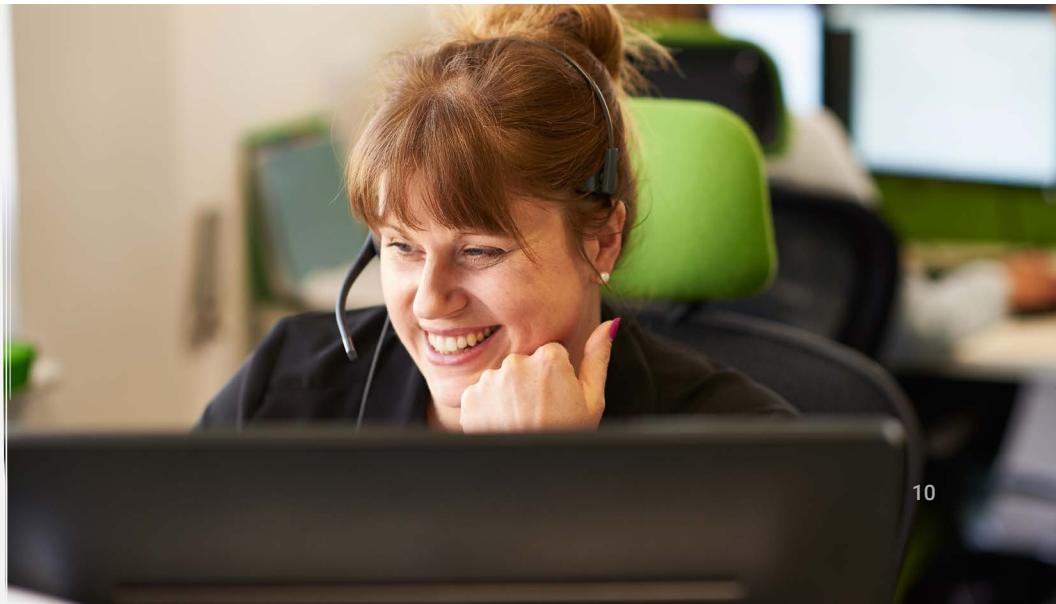
Journeys reveal what's working — and what isn't

When your chat abandonment rate rises, you typically collaborate with the chat operations manager to understand and solve the problem.

But what if a health insurance member abandons her session with a chat agent because she's simultaneously using the website to confirm that a specialist is in-network? Or what if she uses the chatbot to enter the specialist's NPI number to determine network status? Now, she no longer needs a live agent to help her.

By understanding this member's goal and the path she took to achieve it, it's clear that an initiative to better train chat agents might be unnecessary.

Similarly, measuring Net Promoter Score (NPS) in aggregate makes it difficult to identify what exactly causes it to rise or fall. But measuring NPS within the context of a particular customer journey makes it easier to identify the root cause — and a solution — when NPS decreases.

"Customers everywhere are still demanding a more personalized and frictionless experience. Empathy, creative thinking and new tools can help organizations address their customers' needs."

Why Call Center Agents Are Today's Heroes, Forbes, 2020

Exceed customer expectations
and achieve your business goals

When you understand what customers do across service channels, it's easy to anticipate their needs and serve them with empathy. Measuring journeys rather than isolated interactions is the key to making efficient and empathetic experiences possible.

And journey-based measurement helps you quickly pinpoint obstacles that impede your customers' success and quantify the impact on customer satisfaction and business performance. This allows you to prioritize actions that will improve your key metrics.

"Empathy requires an understanding of what customers are looking to achieve and the context of the steps they have taken so far."

Empathy in Action,
Tony Bates, Dr. Natalie Petouhoff, 2021

HOW TO IMPROVE CONTACT CENTER MEASUREMENT

Step 1: Define customer goals

Measuring customer journeys is all about understanding contact center experiences from your customer's point of view. Naturally, the first step in operationalizing a journey-based approach to contact center measurement is to identify and define the goals customers want to achieve when they contact you.

Start by analyzing call reasons, disposition codes, IVR selections, chat logs and more. For example, an internet service provider might find that the highest volume and most frequent contacts stem from customers who encountered connectivity issues and require assistance to troubleshoot their problems.

In this case, the customer goal is to restore connectivity. You can categorize this goal into an overall journey type: a customer support journey.

Other journeys that prompt customers to contact your service center include setting up or activating an account, paying a bill, or changing a product or service.

Defining customer goals is the first step in improving measurement and delivering empathetic experiences. Now, you're ready to align each customer goal with metrics.

CUSTOMER GOALS

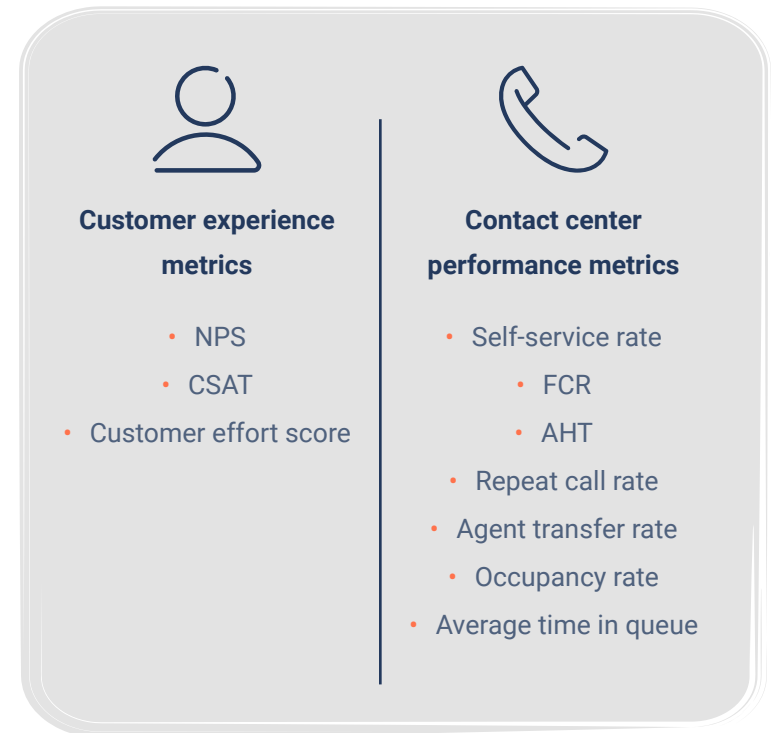|	
MAKE A PURCHASE	PAY A BILL
GET SUPPORT	MAKE A CHANGE

Step 2: Designate metrics that best capture value

Once you've identified your high-impact customer goals, identify customer experience (CX) and contact center metrics that reflect the performance of each journey. This step helps you:

- Determine how contact center experiences affect brand perception

- Connect customer behavior to business objectives

- Prioritize actions to optimize CX and performance

Let's consider customer support journeys. Whether your client struggles to dispute a credit card charge or a customer has trouble activating a new mobile device, consider metrics that reflect your customers' experiences and your contact center's efficiency and effectiveness. You could build a map like the one provided for each high-priority customer goal.

Monitoring overall support journeys gives you a high-level understanding of how your contact center is performing. And if metrics start to slip, you can easily drill down by channel or look deeper into specific interactions within that journey to uncover the cause.

You can apply this approach to each journey you define. Keep in mind: You might use similar metrics for multiple journeys — that's all right. The key is to monitor KPIs like CSAT or self-service rates by journey, rather than in aggregate, so you know exactly where to look (and what to improve) if your metrics trend downward.

Customer experience metrics

- NPS
- CSAT
- Customer effort score

Contact center performance metrics

- Self-service rate
- FCR
- AHT
- Repeat call rate
- Agent transfer rate
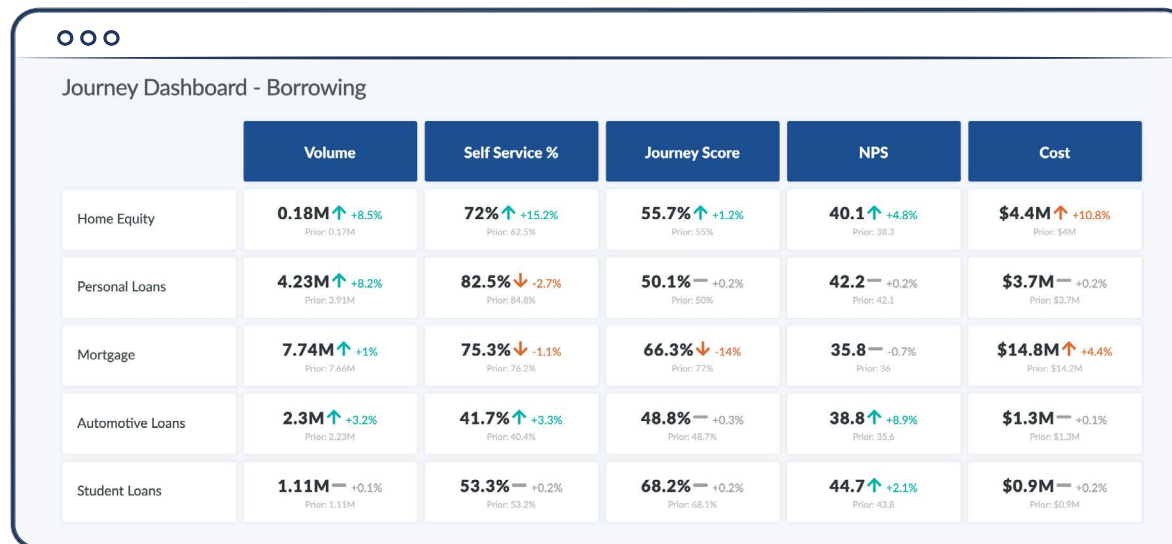- Occupancy rate
- Average time in queue

Step 3: Match metrics to outcomes

You have your CX and contact center metrics specified for each customer journey you've defined. Now, you can move forward and assess how contact center performance affects your company's bottom line.

Customer experience metrics like NPS and CSAT are major indicators of outcomes like customer lifetime value, retention, and revenue or profit growth.

Contact center metrics like self-service and digital containment rates are signals that predict overall operational efficiency within your business. These metrics also have the greatest impact on another crucial business outcome: cost to serve.

The outcomes you're measured by might vary depending on your business and industry. Consider which metrics are indicators of those outcomes. As you align metrics and outcomes to each journey, quantify the impact of fluctuations in metrics on business outcomes.

Journey Dashboard - Borrowing

|	Volume	Self Service %	Journey Score	NPS	Cost
Home Equity	0.18M ↑ +8.5% Prior: 0.17M	72% ↑ +15.2% Prior: 62.5%	55.7% ↑ +1.2% Prior: 55%	40.1 ↑ +4.8% Prior: 38.3	$4.4M ↑ +10.8% Prior: $4M
Personal Loans	4.23M ↑ +8.2% Prior: 3.91M	82.5% ↓ -2.7% Prior: 84.8%	50.1% — +0.2% Prior: 50%	42.2 — +0.2% Prior: 42.1	$3.7M — +0.2% Prior: $3.7M
Mortgage	7.74M ↑ +1% Prior: 7.66M	75.3% ↓ -1.1% Prior: 76.2%	66.3% ↓ -14% Prior: 77%	35.8 — -0.7% Prior: 36	$14.8M ↑ +4.4% Prior: $14.2M
Automotive Loans	2.3M ↑ +3.2% Prior: 2.23M	41.7% ↑ +3.3% Prior: 40.4%	48.8% — +0.3% Prior: 48.7%	38.8 ↑ +8.9% Prior: 35.6	$1.3M — +0.1% Prior: $1.3M
Student Loans	1.11M — +0.1% Prior: 1.11M	53.3% — +0.2% Prior: 53.2%	68.2% — +0.2% Prior: 68.1%	44.7 ↑ +2.1% Prior: 43.8	$0.9M — +0.2% Prior: $0.9M

Increase IVR containment and satisfaction rates

A retail bank optimizes their IVR menu to improve satisfaction and reduce fallout.

The IVR Channel Manager at a leading bank sees agent support fallout increase and client satisfaction rates are declining.

She uses Pointillist® to analyze IVR interactions and leakage, as well as customer journeys that result in the highest volume of IVR fallout. She sees that 20% of clients select the loan information option, then press "0" multiple times to speak with a live agent. By analyzing call reasons and recordings, it seems that, in most of these calls, clients request to enroll in the deferred payment plan.

The IVR manager implements a new menu that allows clients to defer payments without relying on agent assistance. As a result, self-serve containment increases by 20%, resulting in approximately $40 million in cost savings — and CSAT rates return to normal levels.

IVR option: 0

Inbound call   IVR option: Loan info   Agent start

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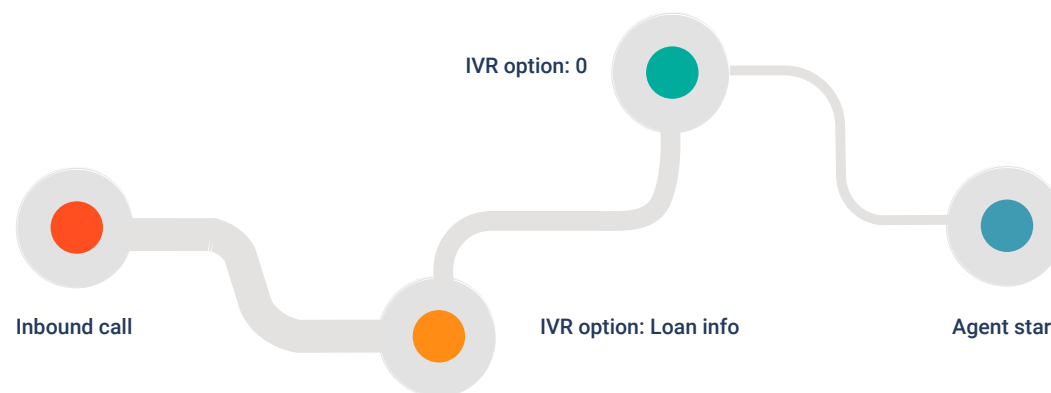
SUMMARY

Satisfied customers, happier employees and better business outcomes

Improving contact center measurement starts with your customers. If you can define the most important customer goals and measure the omnichannel journeys they take to achieve those goals, you're on your way.

Using journeys to enhance how you measure contact center performance can eliminate the blind spots that plague most leaders. Journeys can reveal exactly what is and isn't working, so you can take the right actions to optimize experiences and outcomes.

And while there are countless priorities competing for your attention, it's paramount to remember that improving contact center measurement is critical to the success of your business, your employees and, most importantly, your customers.

Contact center leaders are under pressure to increase customer satisfaction, improve performance and lower costs. In a world where customers expect a personalized experience on any channel they choose, contact center teams struggle to deliver experiences that anticipate each customer's needs by recognizing their preferences, prior experiences and current goals.

That's why customer-centric organizations rely on the Pointillist Contact Center Optimization Solution to improve every contact center experience, increase customer and employee satisfaction, boost contact center performance and reduce cost to serve. Contact center operations depend on Pointillist to:

- Measure & monitor omnichannel experiences both within and beyond the contact center

- Identify the drivers of poor contact center experiences and performance issues

- Deliver frictionless and connected omnichannel contact center experiences by bridging the gaps between chat, voice and IVR