



THE CX EXPERIENCE

10 RULES FOR CX EXCELLENCE

Cloudlinx ebook



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What we have learned so far.

20 years experience in CX, from our podcast discussions and our client engagements

In this quick e-book I will try and relay some of our universal beliefs that we think you should be considering when managing your customer's experience with your contact center. We have had input from excellent clients, fantastic authors & great suppliers who have all intertwined their stories with our own personal experiences to help create our rules. We believe these rules will empower you with real-world experiences to consider when building our your own CX journey.

We hope you enjoy it!




Our rules are not absolute.

Our Theory



A "successful customer engagement experience" is only truly measured by the feeling it leaves the client with. As such, continually developing higher quality CX processes never ceases. You must constantly be striving to enhance & retool the experiences you are offering to your clients. Remember, you can only control the effort you put into your customer's experience; you cannot always control the outcome. As such these rules are by no means an absolute & final list; but they offer a solid framework to build from when considering a technology, a partner and a way of driving your mission statement forward through your enablers.



THINK
OUTSIDE
THE BOX



If your clients cannot reach you how they want to reach you they will become someone else's client.

Rule #1

There are so many ways for client interactions to be driven today that the focus is always on "OMNI-CHANNEL" communications. While that is a solid goal, it requires a level of orchestration that simply may not be needed. Instead, focus on making each way you enable your clients to reach you to work exceptionally well. Make sure that your enablers are focused, dedicated and empowered to deliver a proper experience across each channel. Can your enablers solve the need right there in that forum without the need for complexity or outside intervention?



If you turn your “agents” into “enablers” your clients will benefit.

Rule #2

This rule is about trust and making sure that your agents are not merely taking "calls" but that they are empowered & that you have invested in their success properly. Remember; your enablers are the most forward-facing employees carrying out your company's mission statement. Make sure they can do it well. This requires that management take responsibility for the success of the enablers, and that the tools given are ready to meet management's expectations (from their chair to their knowledge management system).

Share information freely & align everyone's goals from the top down.

Rule #3

This rule is tricky in that it requires you to manage up, down and across the organization. Does everyone know that the information they provide is critical to servicing that client? Are sales completing the CRM data accurately? Is the CEO aligned with your group's goals, is the agent aware of what the company's targets are for them? Does the agent know how their success is tied to the company's success? Where are your enablers drawing their prestige from, and is your CX Group a source of pride for the organization?



Connect Smarter

Proactive outreach is different than following up quickly.

Rule #4

Following up quickly is table stakes now. Do your processes tie into marketing and other processes so you are being proactive with your outreach or are you purely reactionary? Are you working with your clients even when there is no sale to be made to see if they are happy? Proactivity can uncover things you may want to know and will build loyalty and trust and will allow your clients to **BE HEARD.**



If your systems cannot communicate do not expect miracles from your enablers.

Rule #5

THIS IS CRITICAL!

How can agents do their job if they do not know who to call and when, and what happens when they do not know who is calling? How can they tell who is a critical and actual client decision-maker and who is a person trying to "hack" into the system to steal information? We have seen many deployments that have been stalled or cancelled because system integration was not considered upfront with an eye towards the complexity and timing involved. Paying attention to this enables you to avoid a false-start and allows for each of your enablers to be successful without having to go to multiple systems & screens.



Keep all communications professional; no matter how much your agents need to "just be themselves."

Rule #6

Structure is Good!

Avoid the temptation to allow your enablers to freestyle a client interaction. While you want to avoid your enablers sounding scripted & robotic, you need to maintain, within that interaction, a level of professional demeanor in words, actions & structure. You must leave your clients feeling important wherever your enablers are engaged. Everyone likes being treated with respect and this is critical to memorable interactions.

Charlotte Purvis published a great book on this concept called "*The Customer Communication Formula*" that aligns with this rule if you want to expand more into this concept. Available on Amazon.



If you do not **inspect**
what you **expect** you do not
know what you will get.

Rule #7

While this one seems fairly obvious; the creation of an effective quality management process is by no means simple. Managers need to ensure that the tools they have are effective, the providers are diagnosing the right metrics and interactions properly, you have the ability to train on what is uncovered and you have a process to ensure your enablers are getting this growth regularly.

Rule #8

**Treat your enablers
like humans and they will
perform better.**

Treating people like people

This is a rule that is all-encompassing. We can guarantee that when your enablers feel appreciated and feel they have a path for upward mobility, they will perform better.

The enablers are looking to build and advance their careers; are you giving them guidance and opportunity? Do your enablers respond to gamification or is it used as a stick? Is it even the right tool for your culture? This all needs to be considered.



Little changes can have big unintended consequences on your client interaction.

Rule #9

COMMUNICATE EARLY AND OFTEN

Be mindful of each change you make to ensure that you look a few steps ahead. Are you "fixing" something that does not need fixing or are you making wise, considered actions that will result in the desired impact? Oftentimes, simple things can have consequences to the user experience that are not planned. (Remember Murphy's Law is always chasing you). Have you gauged client feedback properly? Do you have a continuous improvement roadmap that certain key clients may be giving feedback on?



Too much data without the right questions is useless.

Rule #10

IT IS EASY TO BECOME ENAMORED WITH THE FLOOD OF NEW DATA YOU CAN RECEIVE.

A common problem we have tried to caution against is having your team ask for every piece of data they can think of that they ever wanted. This potential **deluge of data** is not focused and is not giving you the insights you need to improve because you are not asking the right questions. Eventually, this data will be ignored.

This leads to frustration, apathy, and stagnation of innovation. Instead, don't recreate the wheel, get used to the system, get used to its capabilities and start recognizing service gaps and look for relevant data there. Focus on process improvement and not building a system to fill out reports; build a system that allows constant, incremental improvements for a **better CX experience**.



Checklist

Be sure to use this checklist to see if you have considered each element of your **CX Experience**:

- Does your agent have to toggle between multiple screens and programs to solve a single issue?
- Does your CX Team have a mission statement?
- Does your CX team have a clear goal in mind and clear reporting to show them progress?
- Does your agent get regular feedback on their calls and how good / bad they are doing?
- Are you utilizing client feedback in your planning sessions for regular changes to the CX Experience?
- Does your agent have a clear expectation on how you want them communicating with clients throughout the call?
- Does your system allow for you to proactively reach out to clients regularly?
- Do your agents have comfortable chairs and adequate equipment?
- Do your agents have the ability to solve problems quickly and without layers of approvals?
- Is your contact center software or PBX keeping up with the latest technology trends?
- Does your contact center software or PBX require IT involvement to support?
- Do you have outside counsel to bounce ideas off regularly?
- Does your CEO appreciate your teams' impact to the organization?



CHECKLIST



Who is Cloudlinx?

Cloudlinx (www.cloudlinx.com) is a nationally-minded CCaaS consulting practice focused on helping clients make intelligent buying decisions of cloud-based contact center solutions (CCaaS). Through a unique engagement model and years of practical experience; Cloudlinx can enhance the buying, implementation & support processes for their clients while ensuring they avoid the costliest of mistakes brought on by technology missteps, poor negotiations, false-starts, improper process mapping and scope-creep. Cloudlinx works with clients in every industry and uses experiences gained across industries to help clients think of new ways to do their business. We are an award-winning consultancy due to our work taking complex projects and making them a reality on-time and on-budget.

About the Author

Frank Wassenbergh has spent his entire 20-year career in the telecommunications & CX industry. He works with brands across a variety of industries and brings processes from each to every project. As CCaaS Practice Leader Frank manages the most complex projects that require decisive action & a clear vision to be realized. He personally coordinates the evaluation of a client's current environment & assesses future needs all the way through the creation of the RFP and management of the procurement process. Our process at Cloudlinx is simple; *"We work with you to avoid the costliest of mistakes in a CCaaS migration and we stay involved the whole time to ensure the project is successful."*



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Still working on a 2021 cloud migration strategy for your contact center? Be sure to get the answers you need **before** talking to the providers.

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