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Optimizing Customer Experience Data

to Drive Business Success

Content

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Chapter 1

Using Customer Experience Data to Enable Success

The quality of the Customer Experience (CX) has quickly become an important variable impacting the overall success of an organization. According to the **Gartner** Customer Experience in Marketing Survey, more than two-thirds of marketers say their companies compete mostly on the basis of customer experience, and 81% say that in two years' time, they expect to be competing mostly or completely on the basis of CX. And the systems that impact this customer experience go well beyond the marketing or commerce systems. As this data shows, CX is a responsibility for all operating teams in a successful organization.

A comprehensive perspective is essential, since CX is not driven by one type of interaction or single point of contact. Rather, it is formed based on a range of experiences. As a result, developing CX data from numerous points along the customer interaction continuum is essential, since many different departments within the company will use this data. Nearly every team can benefit from useful CX data.

This makes CX data collection and delivery more than a niche solution. For organizations that are becoming data-driven and running the business based on quantitative dashboards, it

is mandatory that CX data is a key component of those dashboards. Top management will support the use of CX data as an important data set to identify both opportunities and problems.

> **More than two-thirds of marketers say their companies compete mostly on the basis of Customer Experience (CX)**

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Successful businesses focus on three elements of using CX data:

1. How it is interpreted

2. How it will be used to advance organizational goals

3. How it changes when underlying systems, apps, or processes are modified
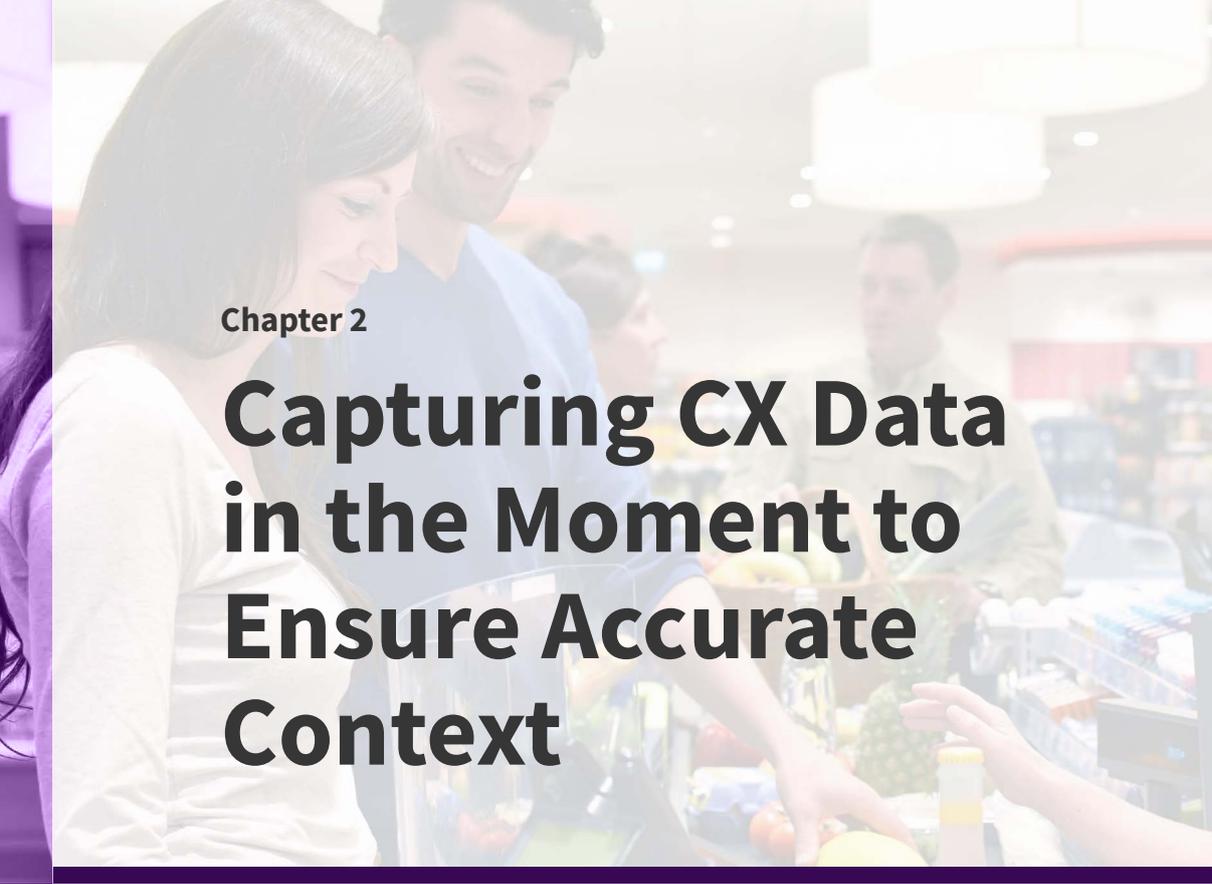
Overview

This eBook will help the reader understand some of the most important best practices and assist in developing an effective perspective on using CX data to enhance success.

Developing effective CX data demands more than just a rudimentary approach to data-collection methods and practices. Poor CX systems can lead an organization astray when data is collected from only some channels, only a few points in the interaction, or when it is gathered inconsistently.

A common mistake is collecting CX data after the fact. Data gathering that is not in the moment may be skewed by false memories or the impact of other downstream interactions. In addition, the data must be consistent both in how it is collected and how it is integrated into business operations. Constantly changing data may cause confusion and will render historical data worthless. Finally, making the data actionable requires that CX data not only is aligned to the business goals, but also effectively used by the operating divisions.

Rudimentary or basic approaches to CX had value in the past, but looking forward, the importance of this data, coupled with the need for a comprehensive perspective, has rendered many legacy CX data-collection systems less than useful. The succeeding chapters in this eBook will go into greater detail on best practices for building a next-generation CX data-gathering process and how it should be used to drive success.

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Capturing CX Data in the Moment to Ensure Accurate Context

Perhaps the most important aspect of ensuring that CX data is useful and delivering valuable input is to ensure that it is clear at what moment the data was captured. Also, the data should be captured at multiple moments. One of the most egregious examples of poor moment management is when CX surveys are provided at the end of an interaction.

The Right Way

A great example of this is the approach to CX data taken by one of the largest cable/Internet service providers. Its survey asks for customers' input about the last person they spoke with, however, this method is doomed for accuracy because the CX process actually starts the interaction with three to four unskilled, low-level, or uneducated staff before the call is escalated to someone that can help. That last person, being better skilled, will get a great rating, but the CX was miserable since the customer wasted 20-30 minutes with unskilled staff prior to being transferred to the competent person. This cable giant is blissfully unaware of a substantial level of customer dissatisfaction.

In this example, it's impossible to know two things: That the process is broken, and what parts are broken. Inflated CX data is hiding real problems. Without enough data points during the entire CX experience, the "last rep you spoke to" approach becomes worthless.

Another important benefit of capturing CX data at many specific points in the interaction is that it helps gain insight into the emotional state of the customer and how that state changes. By having multiple grades for an experience, it is easier to counter the impact of altruism that often results in inflated scores. Rather than having to provide one make-or-break grade, customers can give input at multiple points, making them more comfortable providing

lower scores, and, similarly, they may also provide higher scores. This satisfies the altruistic nature of people.

It is also important that the rating scale be simple and consistent. Fine gradations (1-10 scores for example) invite data problems, as people may have very different perceptions of what constitutes a seven. From an analytical perspective, **mid-level choices** provide very little real value and useful input. With a large range of choices or a numeric scale, it becomes very difficult to understand if a mid-level response indicates low satisfaction or some dissatisfaction. Specificity in responses is essential. Providing specific response options that directly indicate the level of satisfaction or dissatisfaction is the better approach.

Quick and Easy Data from all Touchpoints

The need for multiple CX data points that cover the entire interaction is clear. However, this requirement necessitates data gathering that is unobtrusive and convenient. If the CX data-collection process is difficult, two bad things can happen: Little data is collected, or customer frustration with the survey causes negative perceptions of the CX.

Quick and simple feedback should be the design point. Too often, there are too many internal constituencies that each demand their own questions. For example, a large global bank uses a feedback survey that is 10-14 questions long, uses a 10-point scale, takes 5-7

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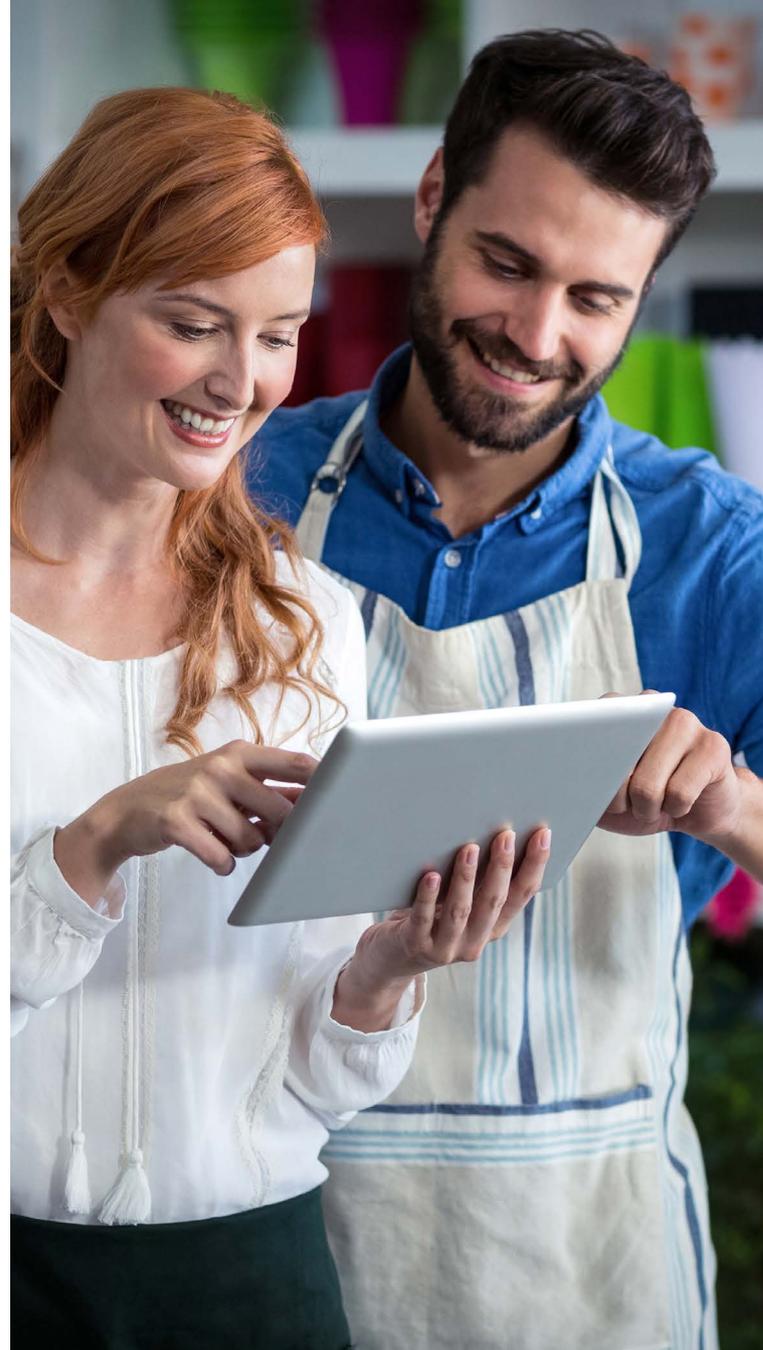
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minutes to complete, and covers everything from web design to the funds transfer process. It's a near certainty that this doesn't really provide much useful input.

Using a simple feedback tool at multiple points in the interaction is essential to diagnosing issues or problems in the CX quickly (for the business) and with low commitment (for the customer). With a simple data-collection approach that generates more responses, it is possible to rotate the data gathering to different points in the CX interaction. More discrete results that are focused on unique points of the CX (phone tree, returns, billing, hold times, etc.) substantially improve the diagnostic capabilities of the data. The benefits to the business are many: Such surveys provide clarity on which processes are broken and where, identify changes based on specific process improvements, and remove the guesswork from using the data.

Automation is Key

Among the most often ignored aspects of broadening data collection is the omission of data from physical interactions. While nearly every organization has both digital and physical customer interactions, many organizations that are attempting to gather both physical and online CX data are not using a consistent system. This makes cross-channel comparison quite difficult. CX data-gathering tools that use a consistent format and scale, such as HappyOrNot, are a huge advantage in gaining real insight into CX performance across all channels.

Systems that capture CX data in the moment and across the entire interaction become less valuable if the data from these efforts is

not delivered quickly. Many of the commerce and marketing systems will support real-time individualization and offers, increasing the value of rapid CX data delivery. Best-in-class CX data-gathering systems will use automation to immediately deliver this data and the accompanying analysis. In addition, systems should have the ability to send alerts if there are sudden changes in sentiment that require immediate attention.

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Chapter 3

Ensuring CX Data is Actionable and Integrated into Business Processes

Once a consistent, comprehensive, and accurate system of CX data collection is deployed, the next step is to ensure that this information delivers real business benefits. The first step to take in making the data actionable is to ensure that CX data is not a mashup of different data sources that are inconsistent or too finely focused to provide broad insight. When different operating groups have their own CX data, the organization cannot develop an accurate, comprehensive perspective that can be trusted for important decisions. This eliminates much of the value from CX data-collection and analysis activities.

Starting on the road to actionable data begins with a focus on shortening the time-to-value from CX data. The longer CX data sits unused in a repository, the less value it has. While many legacy CX systems provided useful weekly or monthly reporting, the reality is that in next-generation, high-speed businesses, CX data must be current to be actionable. Many marketing and commerce systems will change in real time, and, without corresponding CX data, it will be very difficult to maximize the value of those efforts.

Another component of making CX data more actionable is to build strong processes for the integration and utilization of CX data by the different operating groups. Developing a vision for not only how the data will be gathered, but also how it will be used will infuse the data-collection plan with more insight on the use of the data, increasing its value. In addition, there will be less need to redesign or update the data-collection process after the initial deployment.

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CX Data Integration

To optimize the integration of the CX data into business processes, the CX solution must have two-way integration functionality. This allows easy integration of the CX solution into existing apps and web services on the front end, and it should also simplify flowing data into analytics and other software tools on the back end. Put simply, good CX data-collection tools are easily incorporated into the IT ecosystem of the organization.

Integration of CX data is essential to making it actionable and infusing it into the business processes of the organization. However, integration cannot become a resource-intensive, primarily human-driven activity.

Because CX data is used broadly and is integrated into many applications, the cost and inefficiency of manual integration will be a major roadblock. It is imperative that the CX data-collection system have a set of automated tools for data integration and delivery. This is especially important going forward as the amount of CX data being collected increases. Automation also eliminates human errors that may occur resulting in data loss or corruption.

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The Benefits of CX Data for Specific Functional Groups

CX data benefits all levels of the organization. For the C-suite, there is clarity on customer satisfaction trends, comparison to industry benchmarks, and insights that support strategic decision making. Operational managers will receive direct input on what is or is not working, assistance in allocating resources, and data on the success of new concepts or trial processes. Lower level or unit management teams can better plan or staff shifts, identify changes to processes that might be necessary, and uncover specific problem areas. And, for frontline staff, it becomes very clear what specific actions have on the customer experience.

To this point, this eBook has referenced the importance and value of broad use of CX data for many different departments within a typical organization. Within this chapter, the eBook will provide specific details on how these different departments can utilize CX data to enhance their own operations. Individual organizations may have unique needs or scenarios that will differ from what is included in the data below that is focused on a more general audience.

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Marketing

The marketing team will be one of the primary users of CX data. This information will impact many aspects of how offers are conveyed or positioned to the customer. With CX data, it becomes possible to identify the specific points at which the customer becomes interested in an offer.

Marketing teams can test and identify how best to personalize outbound offers to know what makes them attractive or annoying. A CX solution that spans channels will make it possible to accurately identify differences in the CX and both improve consistency or fix problems that exist only in one channel. It is essential that the CX data-collection tools are in sync with development of a customer data platform (CDP) to prevent integration issues in the future.

Sales

For the sales team, CX data can be used in all three phases of sales activity (pre, during, post). In fact, one important application of CX data will be to track how the perception of the CX changes during the selling process.

CX data will enable higher rates of both upselling and cross-selling by identifying when customers are pleased with their experience. On the flip side, quickly identifying customers that are not pleased gives sales an advantage in retaining customers by letting them quickly respond, and remediating the problems. Active listening enabled by CX data collection can also be used to demonstrate great customer intimacy and create preference for that company's brand.

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Customer Support

The greatest efforts in CX data collection may be focused on this department. Study after study tells us that poor customer service results in lost business, reduced loyalty, and negative social media commentary. Perhaps the biggest change going forward is to implement CX data collection that works across channels and focuses on more than the behavior or skills of the customer support representative (CSR).

For example, when internal systems preclude the CSR from resolving a problem, it is essential to know that it's the systems, not the person. In addition, real-time data collection and delivery to both the CSR and management will help improve the CX. The support process also benefits from increasing the number of data points collected during a customer interaction.

Product Marketing

Traditionally, product management was conceived as an internal-to-external set of activities. However, far-thinking organizations are now starting to use CX data to enhance product management. CX data can pinpoint which aspects of the product are well received and which aren't.

CX data can also be used to identify adoption or initial use issues with direct interaction of a new customer's experience. Using CX data to assist the product management team is dependent on improved context of the CX data. General satisfaction/dissatisfaction is not very valuable. A new use case for CX data is support for A/B testing of different product options. CX data can give definitive answers on customer preference for competing options.

IT

For IT organizations, accurate and consistent CX data that has the requisite detail to identify specific app functionality problems is critically important. As IT teams move to the DevOps approach that allows for rapid delivery of new versions of software, CX input will be central to determining what should be included in these updates.

In addition, the use of CX data across channels or contact types is vitally important, since in many companies the systems used for online, telephone, and physical interaction are different. With consistent CX data, not only can best practices in these applications be identified, but the unique needs of each channel can also be identified.

Chapter 5

HappyOrNot Delivers CX Data to Improve Customer Experience

HappyOrNot® is a leader in collecting and analyzing CX data. Its proven data-collection methodology utilizes the universally understood "four Smileys," which simplify customer input and eliminate confusion found in many numerical or complex rating systems. The clarity that data from the HappyOrNot system delivers is essential in making CX data actionable. Customer engagement is increased with this straightforward approach. For organizations in multiple geographies, this method of CX data gathering ensures cross-border accuracy.

One of the most important benefits of the HappyOrNot solution is that it is simple to deploy and easily integrated into existing CX apps. No change management is necessary, reducing operational complexity. The solution is a simple plug-and-play technology that requires either no or very little coding when IT utilizes the existing APIs in the tool.

HappyOrNot enables an organization to cover the entire customer journey with the same CX solution. The simple feedback system makes it possible to engage more often without customer fatigue. This supports clear diagnostics for where the pain points are in the customer journey. The data collected in this manner benefits from stronger context, eliminating guesswork and providing greater clarity.

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360° CX Performance Insights

The HappyOrNot solution also delivers clear and concise performance reports based on the data analytics. The straightforward nature of data collection makes the data easier to interpret and understand. Increased clarity supports faster decision making and problem resolution.

Automated report generation also removes the burden of building reports or creating output manually. Reports can be utilized by key staff 24/7, no matter where staff are located. Automated delivery to essential staff is also possible, including a mobile app to receive results on the go.

CX performance reports can be utilized by key staff 24/7, no matter where staff are located.

In addition to your own data, HappyOrNot has a strong customer success team that can provide industry-specific insights and expertise, and trend information based on the broad, global data collected and anonymized by the company.

Perhaps the most compelling strength of the HappyOrNot solution is support for the "phygital" (digital + physical) world. One of the major flaws in many existing CX data-gathering solutions is their digital-only nature. With a

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wide range of solutions for both physical and digital data-collection systems, an organization can use one complete system for all CX data. These tools are scalable to support any size of business, from small companies to large enterprises.
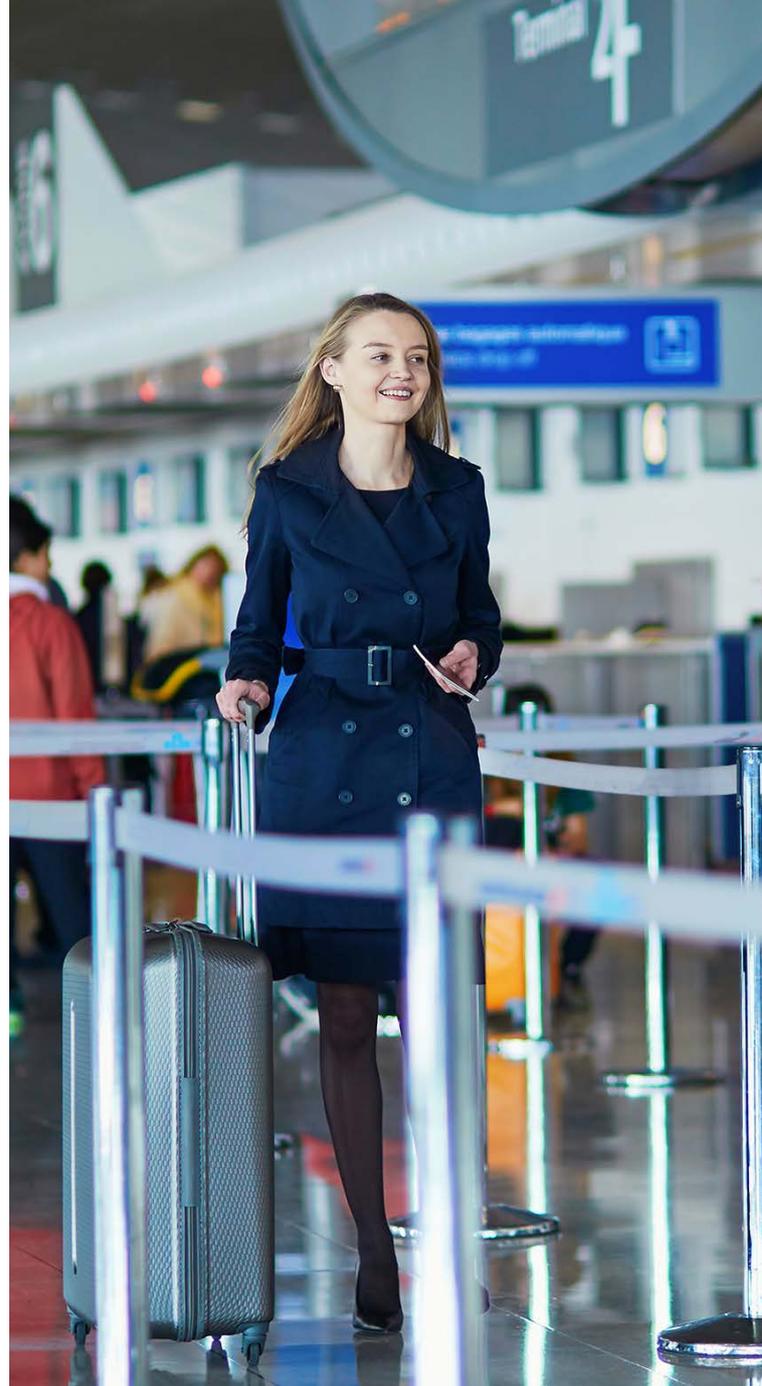
Looking at the benefits of the HappyOrNot solution in real-world use provides perspective. Dallas-Fort Worth Airport launched its deployment of the HappyOrNot solution to learn more about the passenger experience at the airport. It wanted to learn from the millions of customers passing through the airport how to elevate and improve the overall experience.

Improving the Airport Experience

DFW monitors service performance at the main areas of the airport—baggage claim, passport control, and security screenings—asking passengers to rate their experience in each area. Daily, weekly, and monthly result reports are monitored by the airport team to track service performance and monitor trends.

The use of the HappyOrNot solution makes both giving and analyzing feedback easier and more impactful. With the HappyOrNot Smiley Terminals, DFW collects an average of 25,000 passenger feedback responses each month, growing to 45,000 during peak travel months.

HappyOrNot has helped DFW reliably track and monitor service performance, and has become an essential asset to improving the customer experience.

"HappyOrNot has provided DFW with a unique opportunity to accurately gauge how our 64 million customers view our facilities on a daily basis," says **Ricky Griffin**, customer relations coordinator responsible for DFW's customer experience. *"The reports are user-friendly and easy to understand, and the generated customer feedback reports from these kiosks have allowed our team to modify the amenities offered to better fit the needs our customer."*

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