



Modern Customer Service Mapping The Journey Ahead

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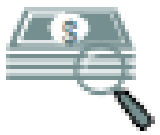
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SUMMARY




EXECUTIVE OVERVIEW

The greatest challenge today for customer service and support organizations is making sure that they can see and serve customers across all engagement channels, including traditional and new channels. Organizations are evolving from dated, cost-hindered, reactive lines of business, to strategic modern organizations that are at the forefront of a unified experience strategy. This evolution contributes to the growth and profitability of the organization by attracting new customers while ensuring existing customers remain satisfied. Gaining a closer relationship with your customer powers this journey to becoming a modern service organization.

Traditional CRM Service Versus Modern CX Service

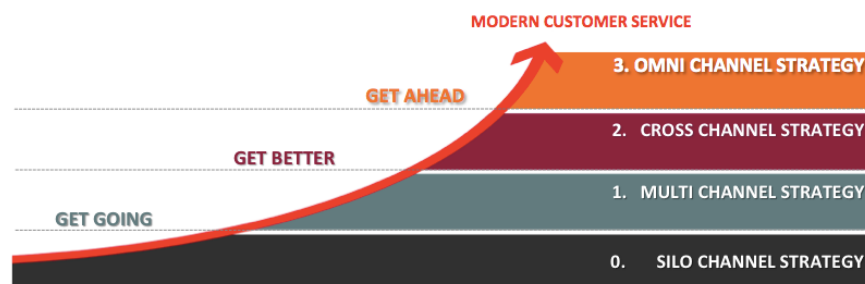
From The Promise To The Delivery Its One Modern Experience

Traditional Service	Modern Service
Tactical Silos	Strategic Omni Channel
Reactive	Proactive
Anonymous	Personalized
Cost Center	Profit Center
Complex	Simple



Oracle Roadmap To Modern™ Defining Modern Service

Business must embrace this modernization as a “evolution”, and not approach it like a “revolution.” It’s not enough for just the brave few to make a huge leap of faith. The bridge you build to the new World of Modern must be one that everyone can cross. If you race ahead, as most try to do, you don’t get the returns or the sustainability from the investments. **Understand that ‘change’ is a behavioral shift that is influenced by thinking, technology is a foundational set of building blocks that needs stacking in the right way, and you must measure the right things if you want to get the right results.** This is why Oracle has developed the Oracle Roadmap To Modern Customer Service framework: to help you navigate this journey through logical and easily traceable phases of maturity.



Oracle Roadmap To Modern™ Evolution To Modern Maturity Curve



PART 1: GETTING GOING WITH A MULTI-CHANNEL STRATEGY

Multi-Channel CARE:

Providing an efficient service interaction at the customers preference of channel and device.

OVERVIEW: Getting Going With A Multi-Channel Strategy is about establishing the foundational baseline of technology, process and measurements. “Empowering Customers with Self-Service,” means delivering on the 80/20 rule of service. For many businesses 80% of customers’ questions can be handled by 20% of their overall knowledge content you either have in documents, or in people’s heads today.

Capturing what that initial 20% is, and then getting it into the hands of your customers to self-solve problems on the web is a great start. In addition, having that SAME content readily available across many channels like email, IVR, chat, even in-store, allows the customers to have a consistent baseline of answers regardless of channel – empowering them to make the selection of which channel/device is best for them based on their preference, versus your ability to answer on a given channel. Placing that same content into the hands of the front line agents ensures the accuracy of your service as your business evolves. Your customers and partners are also on the frontline of change, which is where social communities can help contribute to continuously refining the right 20% of content AND provide you more frequency of touch to start to get in tune with what your customers really need.

Maturing these ‘Multi-Channel’ disciplines, will help you reach your immediate goal of reduced operational costs and business efforts:

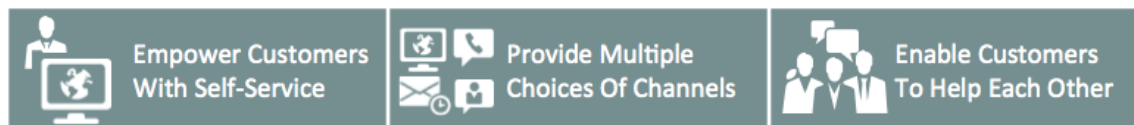
1. Empower Easy Self-Service that allows your business to continuously capture and deliver answers for the most frequently asked questions.
2. Provide Multiple Choices for how your customers connect to you, allowing them to engage according to their preference and need.
3. Connect to Social Conversations that capture the customers’ insights to stay alert to what’s happening all around you, and help customers help each other.

For Other Associated Industry Trends See: Forbes Survey:

<http://www.icmi.com/Resources/Webinars/Forbes-Survey-Roadmap-to-Modern-Customer-Service>

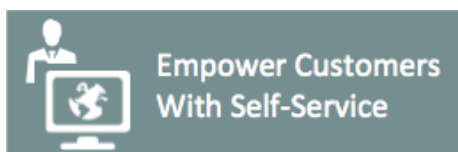


PART 1.1 BREAKING DOWN THE PHASES OF “GETTING GOING”



PART 1.11 GET GOING

> Empower Easy Self-Service



Digital channels like the web are fast becoming customers' primary preferred engagement channel for support. Most customer questions either have been asked before, or will be asked again at some frequency – maybe in different ways – but the

answer is often the same. **The questions that are asked most frequently, typically represent 80% of the contact volume in a call center, but are representative of usually about 20% of your total support related knowledge content** and can be pushed to the web for customers to access.

Many businesses leverage FAQs on their website for customers to access. However, all too often they are posted as static content, are not managed for updates, have no central ownership, have no consolidated access point for customers or agents to find them, and are siloed from any other channel. Inconsistent, outdated answers on the web will drive the highest volume of your customers' engagements to higher cost channels like the phone.

Identifying, capturing, centralizing, and publishing this content into a unified knowledge base, and maintaining it, provides the highest returns to your businesses efficiency across all channels. Self-Service FAQs are also one of the lowest cost approaches for handling the highly repetitive, yet low value engagements that saturate the high cost, high touch channels like phone, or chat.

“Self-service adoption increased across all generations from 2012 to 2014, with the largest increases attributable to older boomers (ages 59-69) and the golden generation (ages 70+)”

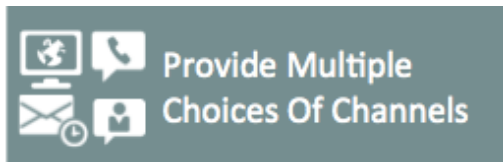
[2015 Forrester Customer Service Channel Usage Highlights The Importance Of Good Self-Service](#)

Self-service FAQ content that is managed through a centralized knowledgebase, and published to the website, for customers to self serve answers on any device, also streamlines your responses and effectiveness on agent assisted channels like the phone, email and chat. In addition, it can optimize your global efforts and reduce costs around translation workflows for content that is required to be authored and maintained in many languages. Doing this right requires some initial and ongoing investment to ensure that the content gets updated – however, this first step is a foundational one that will deliver massive cost saving efficiencies from redirected channel volumes and increased productivity, which can be applied to investing in the customer relationship in your next phase of GETTING BETTER. And you will continue to see the benefits even in a latter stage of maturity for “GETTING AHEAD” where you will start to evolve into being more driven as a “profit center.”

For example, if 100 FAQs represent each of your products / services, that content is rich bait for search engines. So when customers and prospects are asking questions from major search engines like Bing, Google, or Yahoo, they not only get “converted” onto your website, but statistics have shown they continue to engage your site to subscribe, renew, replenish, order new/add on products and services. Those activities are all measurements of growth and profit for your business.

PART 1.12 GET GOING

> Provide Multiple Choices



Your customer is connected at home, on the go, at work, on vacation – and expects to have the choice of how they want to connect with you in the way they want. Each siloed engagement channel needs deployment,

configuration, maintenance (routing, queuing, responding) and skilled resources – and each channel captures, accesses and writes customer data.

Providing customers with multiple channels of engagement helps your business to balance and rebalance volumes across different channels, reducing the risk of having saturated volumes of low value, high cost engagements on single channels such as the phone.

Multiple engagement channels of choice can also provide necessary second and third lines of defenses should you experience a channel surge, outage, or need to reduce the availability of a channel (such as chat) due to resource constraints. All published FAQ content to the “web channel” through a knowledge base should be available on every channel your customer wants to connect with you on (chat, social, SMS, mobile web...).

The duplication of efforts from introducing new channels and information can be a major time and cost factor, and worse it delivers fragmented experiences to your customers. As you add more, or refresh existing engagement channels, you *MUST* consider avoiding the redundancies of effort, content and data, or you will surely be decreasing your efficiencies and increasing your costs over time – which is counter to your evolutionary strategic objectives.

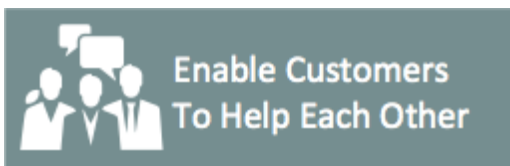
“25% of the massive CX failures, cost the customer only \$20 and take less than an hour to fix.”
Oracle Partner [SDL](#)
[2015 The Global CX Wakeup Call Research Paper.](#)

The efficiency gains from solutions that provide a unified approach to the business logic, configuration, content, and administration can be critical if you are to reach your objectives of this phase. Even if that unification is only within your current online engagement channels, you should look to extensible unified online engagement platforms that connect all digital channels and but preserve your phone channel platform. If you fail to take a unified approach, your cost of service can increase dramatically due to the redundant overhead.

By adding additional newer channels like SMS, Social, Online Chat, you start to differentiate your brand against your competition, and start addressing one of the key customer experience needs of making it easy for customers to reach you. More channels, means better channel volume balancing, and even higher productivity rates on live assisted channels such as chat and phone. Especially as you evolve into the next phase of “GETTING BETTER”, where every dollar you save in this phase can then be leveraged for reinvesting into programs that will strengthen your customer relationships.

PART 1.13 GET GOING

> Connect To Social Conversations



Getting to the right foundational set of content that answers the majority of repeat, easy to solve, low value customer questions and issues sounds great, but the fundamental mistake of many businesses is to treat this as

a “one-and-done” exercise.

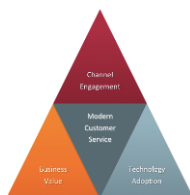
Change is happening within a business constantly (services, products, processes, budgets, resources, environmental, political, partner, competitive, technological, consumer shift in behavior), and endlessly, with increasing velocity of demand. A corner case issue today may become your top issue overnight, and you must be ready to handle it.

Most Customer Service and Support organizations are working with limited access to the people who have the knowledge, typically these a pool of skilled knowledge worker resources, and/or very restrictive publishing policies driven by legal, governance, and compliance. No matter how streamlined your processes are for identifying, capturing, authoring, reviewing, approving, and publishing the knowledge, keeping up with the pace of change can be tricky. To make matters worse, customers rapidly abandon stale engagement channels and escalate to more expensive ones in a frustrated state - and a frustrated customer becomes 10X more costly to serve and solve.

Having the right level of insight into your customers' needs helps you to truly know what the right set of content is for today and plan for changes down the road. Enabling your partners, power user customers, legacy customers and early adopter customers, who have the knowledge, incentive, and capability to share what they know in a safe and efficient way, can be your fastest path to success. You'll meet the demands of keeping your knowledge up to date and fresh with rich evergreen 'tribal' knowledge, as well as gain deeper insight into your customer needs/views/opinions.

Create a private community on your website, which can seamlessly blend into existing communities that customers use (like Facebook). A support-oriented community connects customers to each other, captures what they know, what they want, and what they say. But this shouldn't be ran as a bolt-on knowledge repository service. You will also need to infuse the community content into a centralized search, and seamlessly harvest the content for use in your native knowledge base.

Social communities provide the lowest cost resolution channel, as most customers and partners will share what they know, for the simple satisfaction of feeling that they are helping others like them – even if it's through a simple “like” or “rate” action. In addition to the productivity gains from leveraging resources across your ecosystem, it also starts to build more trusted relationships through authentic and meaningful engagements in preparation for your “GETTING BETTER” retention strategy.



PART 1.2 THE STRATEGIC BLUEPRINT FOR THE “GETTING GOING” PHASE

Channel Engagement

MULTI CHANNEL

Provide Multiple Choices Of Channels To Engage Customers

Technology Adoption

CHANNELS & KNOWLEDGE

Interaction Capabilities For Simpler Ways To Connect More Frequently

Value Measurement

COST CENTER

Reduce Volume And Cost Of Service And Support



PART 1.2.1 GET GOING > Channel Engagements

Strategic Objective: Leading With Connected Customers

- Move from limited options for customers to connect with service and support to multiple choices of channel and/or device.

Engagement Type: Reactionary

- Optimizing engagements generated by customers connecting with service and support, so customers can self-serve and self solve at their convenience.

Success Criteria: Faster Resolutions

- Customers being guided to the best channel to achieve the fastest resolution according to their preference and need, but not forced to choose among limited options, resulting in more evenly balanced channel engagement volumes.

Maturity Phase: Getting Going

Establishing the foundational baseline of technology, process and measurements

- Empower Customers With Self-Service
- Provide Multiple Choices Of Channels
- Enable Customers To Help Each Other



PART 1.2.2 GET GOING > Measuring Value

Measurement Focus: Cost Center

Focused on reducing the operational cost and efficiency redundancies of servicing high volume demands on siloed channels

Value Objective: Efficiency. “Increased Productivity At A Lower Cost”

Prioritize value measurements around channel mix volumes, and operations that deliver scale, and lower costs

- Reduce your high cost engagement channel volumes shifting the low value, highly repetitive simple problems to low-cost channels
- Streamline your agent and system productivity to increase time-based efficiencies for highly repetitive simple problems
- Shift CAPEX costs to OPEX budgets, to lower infrastructure and technical resourcing overheads

Primary Success Measurements: Volume And Cost

- Channel Volume Rates
- Average Handle Time
- Time To Resolution
- Answers Served
- Channel Costs
- Maintenance Costs
- Development Costs



PART 1.2.3 GET GOING > Technology Adoption

Investment Priority: Channel and Knowledge Improvement

Invest in technologies that help create unity around channels and a foundation of knowledge.

Approaches:

- Self Service FAQs
- Online Assisted Service
- Social Answers

Solutions:

- Knowledge Base
- Web Self-service
- Mobile Service
- Online Chat
- Email Resolutions
- Customer Surveys
- Communities
- Online Engagement Platform

Example Of “Multi-Channel” Capabilities:

- New Engagement Channels: Web/Email/Chat/SMS
- Online Incident Email/Web Forms/Tracking
- Click To Chat/Call
- Guided Self Service Resolution Flows
- Auto Answer Response Emails
- Online Surveys
- IVR Self Service



PART 2: GETTING BETTER WITH A CROSS-CHANNEL STRATEGY

Cross-Channel CARE:

Providing a consistent service quality experience across and within every channel of engagement.

OVERVIEW: Once you have a SOLID baseline foundation of knowledge – you can grow it – but how? The Agent Experience should be a primary focus for your business to “GET BETTER.” The people, practices, and processes that support and empower agents during every engagement with your customers.

The systems, desktops, knowledge and data should streamline every step in every interaction to make it seamless for them to effectively engage, nurturing the soft skill development that helps them grow. Do you have the right skill set today? Are you accurately planning the skill set for tomorrow to match what customers will need? How many of your agents are “Super Agents” who can seamlessly work email, phone, chat, social and author/maintain knowledge content? Can you extend that same quality service onto devices, into games, over SMS, blended with social? As your customers traverse the different devices, channels, and agents, you will need to have your organization aligned, unified and efficient to keep the balance of the experience.

“77% of US online adults say that valuing their time is the most important thing a company can do to provide them with good service”.

2015 Forrester Report
[Contact Centers Must Go Digital Or Die](#)

These CROSS-CHANNEL disciplines will help you keep your customers loyal, and your business streamlined:

- *Standardize Consistent Service by consolidating on a single engagement platform that optimizes your people and processes, and can be easily tuned to your evolving business needs.*
- *Innovate Convenient Service so customers get easy access to support, even in the far reaches of where your brand touches the customer.*
- *Deliver Reliable Service by connecting all silos and formats of knowledge in your business, to efficiently handle even the most complex issues*

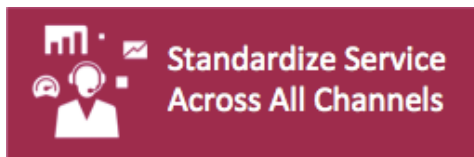
For Associated Best Practices See: Consortium For Service Innovation KCS Knowledge Practices <http://www.serviceinnovation.org/kcs/>



PART 2.1 BREAKING DOWN THE PHASES OF “GETTING BETTER”



PART 2.2.1 GET BETTER **> Standardize Service**



The customers' engagement channel of choice is dynamic, or should be! Customers given the choice will connect with their preference of channel for the type of engagement they need, *and* many of them will switch channels during

engagements, especially on digital channels (web, chat, email, SMS) where switching is seamless.

The nuances between different channels and their supporting technologies require different types of behavior from the agents during the engagements based on the expectation for interaction, and the style of communication (voice, real time typing, detailed typed correspondence, limited character typed interaction). As customer preferences shift to the digital channels for many types of engagements, agents are required to handle many channels of communications across multiple systems/interfaces.

The problem with many systems for communications and many types of communication styles is that they are static and often fragmented, disjointed, inconsistent, and irrelevant during customer interactions. This can have a negative impact on both the agents and the customers' experience. **Few agents are capable of traversing all the communication systems and styles - those who can do it, pay the price for it in terms of higher workloads, resulting in lower agent satisfaction and reduced agent retention.** Moreover, from an operational perspective, legacy systems that agents must use are extremely inefficient., and are increasing expensive over time to train on.

“We first train our agents on what buttons not to push”
A Major U.S Brand Call Center Manager direct quote.

“Agent support of phone and assisted-service digital channels has become far more complex and critical, and the new demands will lead to 83% of US contact centers maintaining (29%), or growing (54%), their current employee numbers.”

Empowering agents with a complete customer engagement platform for all channels, that delivers a unified cross-channel agent desktop, allows them to have one place to login and have a single view of the customer, enables and guides the communication flow between channels, and ensures the same quality of service can be efficiently delivered by even newly trained tier 1 agents, field customer service agents, and for third party / overflow contact centers. By leveraging a cloud based platform solution, businesses can rapidly deploy, configure, maintain, and extend the systems to meet the needs of each agent, group of agents, available channels, workflow/routing, and business groups without the heavy lift of ongoing IT requests.

“An average of 35% of US organizations don’t believe their systems meet their current needs, and 83% say that their technology won’t meet future needs.”

Dimension Data [2015 Global Contact Center Benchmarking Report](#)

Open standards-based platforms provide the extensibility and integration into the on-premise back end and back office systems required for customer engagements.

Agent/Customer Satisfaction from optimized, efficient, personalized systems that truly empower agents to engage with customers across any channel in a consistent and relevant way provides many measurable benefits, especially with customer/agent CSAT/ASAT (Customer / Agent Satisfaction Score), loyalty, and advocacy. Beyond these, the continued efficiency gains from the right channel volume balancing, and improved resolution rates help to drive more savings for reinvesting in your customer relationship initiatives - as well as unifying customer data across all the channels so you have quality data to mine in the next phase of GETTING AHEAD.

PART 2.1.2 GET BETTER

> Innovate New Engagements



Customer Experience initiatives drive the need and the impetus for developing better or new ways to interact with customers. These are often led by IT and funded by marketing or sales (mobile applications, in-game promotions, in-

device connections, in-store kiosks, etc.). However, your customers who explore these innovations require more than “fun transactional” interactions to make the engagement really return on the investment made in adopting them.

Customer Service and Support is all too often at the tail end of customer engagement innovation design. At best, this becomes an afterthought in the design process, where a simple “help” link, “phone #” or “contact us” instructions are provided.

What this looks and feels like for your customers is a disconnected experience. After they take the plunge to adopt the product/innovation you are promoting, if they need help or have questions (which most new types of interactions do), they are forced to disconnect from the experience and switch channels. These types of “CX” innovations are created in silos, separate from the engagement systems, and leave not only the experience, but also the data in a vacuum.

Read about the innovation revolution of the Apple Store experience. Designed it with Customer Service first, not product, but customer engagement: <http://www.amazon.com/The-Apple-Experience-Building-Insanely/dp/0071793208>

During a field engagement, in a website redesign, in a new mobile app, on an interactive display, on an ATM, in a new social advertising campaign, store layout design... businesses need to design with customer service and support at the forefront of the thinking and make it infused into the engagement, versus bolted-on. Designing innovation with the relationship to the customer in mind, not just the transaction, will elevate and promote your successes across all your CX efforts. The combination of intelligent use of technology, authentic content with substance, and connected data can also help you to achieve industry recognition for your accomplishments.

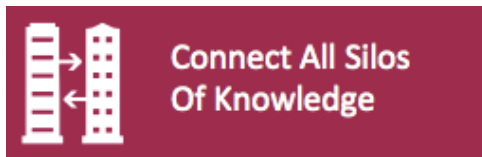
Businesses need to look towards extensible Cloud platforms that allow for visual “configuration”, that have extensive open APIs with development examples, are mobile-ready, social-ready, can be easily extended with PaaS (platform as a service) development, and provides both OOTB and reference integrations. Capabilities such as these also help with the departmental objection handling of leading the design process with Service, as it enables innovation without the need for heavy/costly customization, integration and middleware development (the typical issues that are raised).

Innovations that are designed around the customer engagement, which ensure that the effort made by the customer is exciting, efficient and sustainably rewarding, can deliver greater retention and start to build organic viral growth through value based differentiation.

These benefits are measurable and traceable to direct and indirect paths of growth and profits. Customer Service and Support organizations are also able to leverage this insight to start planning metrics that will measure progress towards becoming a focused “profit center.”

PART 2.1.3 GET BETTER

> Connect All Knowledge Silos



Typically, a business’ largest volume of “knowledge” related content is authored and disparately managed outside of the Customer Service and Support organization. This content usually is tailored to needs of the more complex

customer issues and resolutions. These factors require a broad and deep level of associated products, service, usage and knowledge in order to dissect the nugget of information that is required for that particular issue being resolved. This type of knowledge can be considered as the remaining 80% of content that is needed to support 20% of customers. The type of customers that require this depth and breadth of knowledge represent your current, past or future “most” valuable engagements, and can require more expensive agent assisted channels and/or multiple customer engagements to extract and deliver the information necessary.

As the content is mainly not authored, managed, owned or tracked directly by the customer service and support organization, its use in response to service and support questions can be problematic and lead to lengthy resolution times, increasing backlogs of incidents. **Inconsistency and redundancy in shared knowledge causes collateral damage with highly valued customers, using high cost engagement channels.** To make matters worse, the places that expose the customer directly to this knowledge, such as a website search, are often disconnected from “support” knowledge searches, and they are not measured against accuracy for resolutions.

“20% of a contact center agent’s time each day is spent looking for appropriate information. And 61% of unresolved support calls could have been resolved with access to appropriate information.”

[Aberdeen Group](#) Report
Contact Center in a Profit-Centric Service Organization.

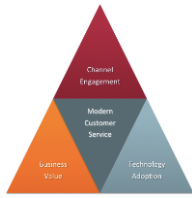
Adopting Knowledge Management best practices enables enterprises to gather, structure and distribute knowledge, along with technologies that help customers/agents find and access the knowledge in a measurable and unified way across all current and legacy systems. Furthermore it generates the cost justification insights required for ongoing investments in deprecating, revising, translating,

syndicating and maintaining the most valuable knowledge assets to the right audiences.

Businesses should look towards solutions that have well structured natural language processing capabilities, so they are adaptable to understand your business language as it changes, your customer/agent needs as they evolve their learning, and your content at a word, sentence and document level for what it answers, and robust enough to handle the ever-growing volumes of content and usage data.

Connect Knowledge-As-A-Service through open APIs that are integrated across your enterprise systems, and headlessly augment any application with the right version of the content, delivered for the right person, at the right time, over any channel. Design applications that can be infused with your 'simple' FAQ knowledge as a modular approach to relating associated articles within a complete resolution flow.

Investments in highly valuable knowledge, needed by high-value customers, ensure you maintain a committed relationship of continued value and satisfaction with your customers throughout their journey, from adoption to increased usage, to renewal/expansion. When you can understand and predict both customer and content intent, you begin to personalize engagements in a proactive way that is needed for an Omni-Channel strategy.



PART 2.2 THE STRATEGIC BLUEPRINT FOR THE “GETTING BETTER” PHASE

Channel Engagement

CROSS CHANNEL

Enable Service Quality Consistency Across Every Channel

Technology Adoption

TRAINING & PROCESSES

Optimization Capabilities For Standardizing Engagement Quality

Value Measurement

VALUE CENTER

Strengthen Relationships With Customers To Grow Loyalty



PART 2.2.1 GET BETTER > Channel Engagements

Strategic Objective: Recognized for Service Quality & Innovation

Move from silo systems for agents to engage, to standardized unified systems for consistent and relevant service quality on every channel, device and location.

Engagement Type: Nurturing

Investing in strengthening customer relationships during high-value engagements providing additional value add, and experience insight led services / programs.

Success Criteria: Loyal Customers

Agents empowered and rewarded to engage and guide customers consistently on every channel and across all channels, beyond resolution, that delivers measurable value based satisfaction during every interaction.

Maturity Phase: Getting Better

Enable cross channel service quality and consistency.

- Standardize service across all channels
- Innovate new ways to engage
- Connect all silos of knowledge



PART 2.2.2 GET BETTER > Measuring Value

Measurement Focus: Value Center

Focused on improving customer loyalty by investing efficiency cost savings into the quality of service for greater satisfaction and measurable advocacy.

Value Objective: Retention > Increased Agent And Customer Satisfaction

Prioritize value measurements around channel satisfaction rates to consistently drive greater retention metrics on every channel and across channels.

- Reinvesting the efficiency savings from GET GOING into technologies that streamline agent systems across the business
- Investing in agent skill-based training to cultivate a culture based on customer engagement across traditional and newer channels
- Innovating new touch points and programs that promotes customer loyalty and advocacy

Primary Success Measurements: Loyalty And Satisfaction

- Net Promoter Score Retention/Churn Rate
- Life Time Value (LTV)
- Customer Satisfaction Score (CSAT)
- Customer Effort Score (CES)
- First Contact Resolution (FCR)
- Average Abandon Rate (AAR)
- Agent/Customer Churn



PART 2.2.3 GET BETTER > Technology Adoption

Investment Priority: Training & Process Improvement

Invest In technologies that help with People & Process improvement in both single channel interactions, and the ones that cross multiple channels.

Approaches:

- Standardize Service Across All Channels
- Innovate New Ways To Engage
- Connect All Knowledge Silos

Solutions:

- Unified Agent Desktop
- Integrated ACD/IVR/CCC
- Custom Application Channels

- Knowledge Management
- Unified Social Engagement
- Integrated Field Service

Example Of “Cross Channel” Capabilities:

- Contextual Workspaces
- CTI Integration
- Experience Routing
- Knowledge Management
- Social Monitoring
- Single Sign On
- Workflow/Scripting/Business Rules
- Field Service Dispatch/Monitoring
- Mobile Agent Desktops
- Mobile Apps
- Integration APIs
- Custom Objects
- Knowledge APIs
- PaaS (Platform-As-A-Service)

PART 3: GETTING AHEAD WITH AN OMNI-CHANNEL STRATEGY

Omni-Channel CARE:

Providing a personalized customer service experience that recognizes the value of the customer in every interaction.

OVERVIEW: Customer Experience is a strategy for achieving sustainable growth and profit. The term “Customer Experience” is defined by “the sum of all interaction a customer has with a brand over the life time of their interactions.” The Customer Experience journey is represented by an infinity loop that spans all Marketing, Sales, Service and Support interactions. You must put customer service at the HEART of your CX strategy and continuously

improve and innovate experiences, which make a difference. Sometimes this requires you to go back a step, wash/rinse/repeat on foundational elements that were missed, not matured, or got stale as change occurred.



Oracle Roadmap To Modern™ The Customer Experience Journey

Getting Ahead means moving beyond the baseline of consistent service quality. How? By leveraging Big Data to get to that mythical “360 degree view of the customer” which has been bounced around since the dawn of CRM (Customer Relationship Management), and applying what you learn to every engagement of value. In theory, the data allows you to take action on all the insights you get about the customer – but it ONLY works if you can whittle it down to the ‘Small’ Data that matters for the engagement you are in, or ideally are planning to have next.

Read Micah Solomon blog on Forbes about: [How To Create Incredible Customer Service Through The 'Small Data' Advantage](#)

That is where your ability to access real analytics becomes the inflection point between analysis paralysis causing “dysfunctional engagement,” which is embarrassingly wrong and nets out in negative value, OR, getting ahead of your competitors with rich accurate data that is applied in a positive meaningful way and results in streamlined continuous business growth. With the right analysis of data, combined with technologies for more personalized engagements such as proactive

decision-making, virtual assistance, location based services enterprises can begin to achieve desired and designed business outcomes.

Personalized Omni-channel engagements grow the business with sustainable differentiation – **not just best price, best capability, but YOUR actual differentiation becomes the Service experience you deliver to your customers time and time again.**



“Zappos is a customer service company, that just happens to sell shoes. You have to make customer service the entire company, not just a department.”
CEO, founder Zappos Tony Hirsh



“Wealth, like happiness, is never acquired directly. It comes as a by-product of service. A business absolutely devoted to service will have only one worry about profits. They will be embarrassingly large.”
CEO, founder Ford Motor Company, Henry Ford

Stand out for your efforts in customer service and support with these OMNI-CHANNEL disciplines:

- *Integrate Reliable Insights for a unified view of your customer, and actionable opportunities that have measurable business outcomes.*
- *Tailor Personalized Experiences, with proactive relevant assistance, that understands the customers need, and helps drive new opportunities.*
- *Connect Experiences and practices across all departments for seamless engagements throughout the customer’s lifecycle.*

*For Associated Industry Trends And Best Practices See: **Customer Experience Professionals Association** <http://www.cxpa.org/>*



PART 3.1 BREAKING DOWN THE PHASES OF “GETTING AHEAD”



PART 3.1.1 GET AHEAD

> Unify All Customer And Business Data



“Customer data” is data that can be gathered and retrieved from all aspects of businesses’ past, current and trending customer engagements – contact records, interaction records, behavioral records, incident records, consumption records,

purchase records, payment records... over all channels, devices, systems and departments. This is why it is seen as a “BIG DATA” initiative to harvest all master systems of records for the purpose of analyses on the business operations, and action for improvement. Omni channel engagement strategies require a business to have access to accurate customer data that be leveraged in during real time and proactive engagements, be they digital or human, in every channel.

Read Steve Signoff blog on SerachCRM [Omni-channel customer experience takes aim at information silos](#)

Disparate customer data records from siloed channels, systems and departments requires a lengthy, unrewarding effort to access, cleanse, de-dupe and reconcile what’s available into meaningful data.. Historical views of data can be both misleading and not useful to apply or derive meaningful change. Inaccurate data leads to missed opportunities, wrong or misleading communications, and irrelevant engagements that have a negative impact on the relationship and result in a negative outcome from investments.

If you put bad data in, then you will get bad data out! Data that is unified and cleansed while being gathered becomes easier to centralize and harvest for feeding into engagements for timely action. Centralize a 360-degree view of the customer by unifying the insights both during every transaction and through post-process analytics.

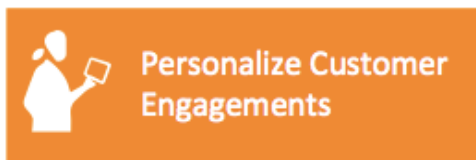
Connect the customer service data that was unified across all channels in the previous GET BETTER “Cross-Channel” phase, with Sales and Marketing data in

back office systems (API Integration) into a single customer Master Data Management view (MDM), leveraging business intelligence (BI) analytics to process the “small data” that can be applied during the interaction. Extend the agent desktop to dynamically receive the real time insight for system rules and agent customer engagements (Extensible Configuration).

Holistic and accurate business and customer data enables you to track how the investments in agent efficient operations and customer relationships are contributing to the growth and profits for the business – reliable insights become the true north for the what, where, when and how to differentiate the brand. For example, a complete and an accurate view on Customer Life Time Value, historical, current and potential, will demonstrate guidance for which channel or agent, or journey across channels/agent, you can guide customers towards to achieve the desired outcome.

PART 3.1.2 GET AHEAD

> Personalize Customer Engagement



Timely, relevant and personalized customer engagements create opportunities to capitalize on greater value from the interaction. Digital channels provide businesses with deep insight into past, current, trending customer behavior.

Mobile devices empower customers to always be connected, and enable business to reach the customer at anytime through a variety of channels. Modern marketing understands and embraces this principle with deep segmentation for campaigns that leverage all data available to present offers, promotions, and brand awareness to customers over digital and analog channels. Customer service and support typically runs in a “reactionary” state of operations, that is, it waits for customers to contact them on their preferred channel. Customer service and support also has traditionally followed a basic model of customer segmentation designed around Service Level Agreements (SLA) and geographies.

A business that embraces a modern marketing approach to customer engagements, but has a customer service and support practice that has a traditional limited segmentation model, creates an experience gap for the customer. Customers expect the brand to deliver on its promises, which are not met. High cost channels of engagements can’t scale to the needs of all customers and must be optimized for longer engagements with higher value customers. The effort of obtaining the data needed for engagements can far outweigh the value derived from the engagement, or worse, prevent the data from being used at the time when the engagement is needed.

Leverage historical, trending, and real-time customer behavior and insight data, with intelligent system-driven multi-channel engagement outreaches, use self-learning engagement routing rules, followed by automated online virtual agents, and with

recommended next best actions on the desktop for agents during live engagements to provide timely, relevant, personalized customer engagement.

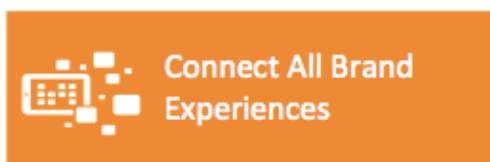
Get this phase wrong and you may cause valued customers to revolt! Its OK to try things out with this phase of your journey but **don't try to run a marathon before you can walk a mile, or you will quickly fall flat on your face and not get back up so fast!** Every business wants to get here too fast. So STOP and ask yourself at this phase “if I get it wrong how exposed are we?”, “have I made the right foundational investments?”, and “Is the amount of juice I will get worth the effort of the squeeze I will apply?”. If you are exposed, reduce scope. If you don't see the value in a short period of time, then you may need to reduce your scope further, or go back to look at what earlier foundational elements need to be optimized to support what you are trying to accomplish. Or, maybe you should need to review how you are measuring the juice! At this phase it should be all about lowering acquisition costs through higher advocacy rates, from greatly personalized experiences.

Adopt solutions that are designed to easily gather historical information, have self learning intelligence, can use Natural Language Processing to understand customer intent, monitor real-time behaviors, take automated actions for invitations to connect, optimize routing, or make recommendations based on the trending data available.

Every engagement is an opportunity to influence customer value, directly and indirectly, which can be measured through higher average order value, conversion rate, and lifetime value. This significantly reduces acquisition costs/effort, abandonment rates, and customer churn rates.

PART 3.1.3 GET AHEAD

> Connect All Brand Experiences



Businesses that are embracing Customer Experience are differentiating from their competitors, and achieving organic growth at significantly lower acquisition costs through a stronger relationship with customers from

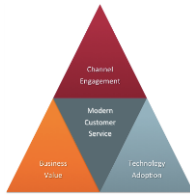
experiences that deliver on the promise of the brand, during the customers' moment of truth. However, businesses embracing Customer Experience initiatives are still operating and funding them inconsistently in organizational silos, and making the majority of CX investments within Sales and Marketing. The combination of heavy investments in siloed CX efforts increases acquisition costs and further reduces operational budgets for Service and Support driven initiatives – take from Peter to pay Paul. This fragmentation and disconnected strategy actually has a negative impact on the businesses' customer experience, which further hurts the brand and increases customer churn.

Even in business that have an active CX strategy, their Customer Service and Support department typically doesn't even know what the brand promise Marketing and Sales are making to customers, yet it's their job to deliver on it!

Having Customer Service and Support supplying customer insights for Marketing and Sales driven customer engagements and opportunities, delivers on the brand promise to customers, the returns on CX initiatives for the business, and positions Customer Service and Support in a demonstrable way for as strategic partner in all CX investments and decisions.

Invest in a unified Cloud based Customer Experience Platform that leverages a combination of robust open standard API's, native common applications in Sales/Marketing/Service, as well as can support development of custom applications for unified engagements through PaaS development.

Read Denis Pombriant DestinationCRM blog on [Omni-Channel Strategy Begins with Platform](#)



PART 3.2 THE STRATEGIC BLUEPRINT FOR THE “GETTING AHEAD” PHASE

Channel Engagement

OMNI CHANNEL

Engage In Every Channel With A Personal Relevant Experience

Technology Adoption

DATA & PERSONALIZATION

Proactive Capabilities For Personalizing Service Interactions

Value Measurement

PROFIT CENTER

Measure Monetized Opportunities From Loyal Brand Advocates



PART 3.2.1 GET AHEAD > Channel Engagements

Strategic Objective: Differentiated And Leading With Personalized Service
Moving from anonymous service experiences, to truly personalized segmented engagements, at the right time, in the right way.

Engagement Type: Proactive

Leveraging accurate, unified and actionable data in a timely manner to reach out and engage customers with a relevant and highly personalized service engagement that drives greater value for the customer and business.

Success Criteria: Sales And Profit

Every touch point and interaction with the customer is connected across the business (marketing, sales, service...) for a unified brand experience – the promise, the commitment and the delivery objectives exceed industry standards and meet customer expectations.

Maturity Phase: Getting Ahead

Enable Cross Channel Service Quality And Consistency.

- Unify All Customer And Business Data
- Personalize Customer Engagements
- Connect All Brand Experiences



PART 2.2.2 GET AHEAD > Measuring Value

Measurement Focus: Profit Center

Focus on creating opportunities to acquire new customers at a lower cost, while measuring conversions and increased sales from loyal brand advocates

Value Objective: Acquisition > Monetized Opportunities From Engagements

Prioritize value measurements around conversion rates, advocacy and acquisition costs

- Get opportunities at lower acquisition costs
- Have an effortless path to conversion
- And increase sales by delivering recognized value

Example of Primary Success Measurements: Growth And Profit

- Number of Customers / New Customers
- Cost of Acquisition
- Average Transaction Conversion Rate
- Average Order Value
- Abandonment Rate
- Life Time Value
- Share of Wallet



PART 2.2.3 GET AHEAD > Technology Adoption

Investment Priority: Data & Engagement Improvement

Invest in technologies that help with Big Data & Analytics, getting to the actionable DATA.

Approaches:

- Unify Customer And Business Data
- Personalize Customer Engagements
- Connect All Brand Experiences

Solutions:

- Master Data Management
- Business Intelligence
- Co-browse Assisted Service
- Virtual Assistant
- Engagement Marketing
- CX Marketing
- CX Commerce
- CX Sales
- CX Platform

Example of “Multi-Channel” Capabilities:

- Dashboards / Analytics / Reporting
- Proactive Engagement
- Real Time Decisions
- Open standard APIs
- Reference Third Party System Integrations
- OOTB Integrations
- Platform-As-A-Service (PaaS)



SUMMARY

Trying to jump the chasm to become a modern service business in siloed initiatives only creates experiences gaps with the ones you leave behind and burns your investments. Not having a comprehensive and cohesive maturity strategy that evolves and guides your organization to a state of being a Modern Customer Service organization, will result in the continued lack of funding, resources and priority for your business to reach its customer service goals. Only focusing your Customer Experience efforts on the promise, within Sales and Marketing will prevent you from delivering on that promise, your ability to retain your customers, and increase your acquisition costs. The ONLY way to achieve sustainable growth and profit for your business in today's modern World is to incrementally, intentionally and purposefully invest in placing Customer Service at the heart of your business and Customer Experience efforts. The Oracle Roadmap To Modern Customer Service maturity framework, with the supporting Oracle consultative discovery programs, and Partner Network, has been designed to show and lead you to address the “how” to achieve the desired state. **Oracle has more insights into more businesses, within more industries globally, and offers the leading comprehensive CX cloud based platform for Sales, Marketing, Social, Commerce and Service. Our Roadmap To Modern discovery programs are ready to help guide you on your journey to success.**

Define Your Roadmap To Modern And Reach Your Vision



Oracle Roadmap To Modern™ The Nine Steps Of Excellence for Modern Customer Service



APPENDIX

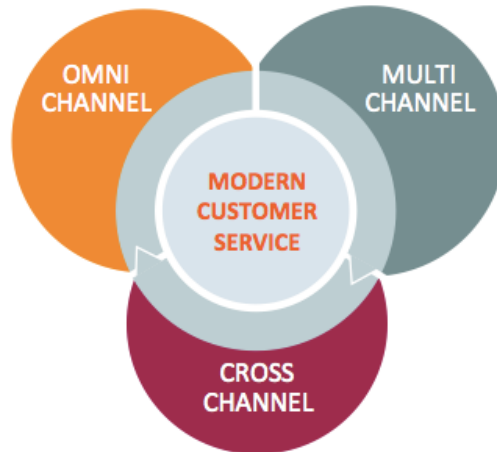
TERMINOLOGY DEFINITION

As with the start of any plan for change, **effective communication** is the key to success, and more so, it's at the root of most failures when it's missing. Ambiguous industry terminology that is thrown around can cause the most confusion between people and groups when planning for change. A simple word/phrase can have a variety of interpretations, especially when it's been marketed in so many ways. It's made worse when 'buzz words', like ones associated with Modern initiatives around such as "*Omni-Channel*" or "*Cross-Channel*" are used interchangeably in a single conversation.

For this reason, The Roadmap To Modern Customer Service™ framework has worked with the industry thought leaders to present a benchmark definition of common "Channel Engagement" terms and broken down their meaning.

- **MULTI –CHANNEL:** Multiple choices of channels, and or devices to connect with customers **at their preference**.
- **CROSS-CHANNEL:** Standardized **consistent and authentic** service quality on, and **across every channel**, device and location.
- **OMNI-CHANNEL:** A single branded, **personalized** and segmented experience, **at the right time**, in the right way on, and across every channel, **across all departments**.

When you have a common language definition of the terms, you can apply them to phases of a Maturity Strategy, and map where you are, and what/how you need to change to progress.



Oracle Roadmap To Modern™ The Three Centers Of Excellence for Modern Service

KEY ASSOCIATED INDUSTRY TRENDS

Service Drives Customer Experience

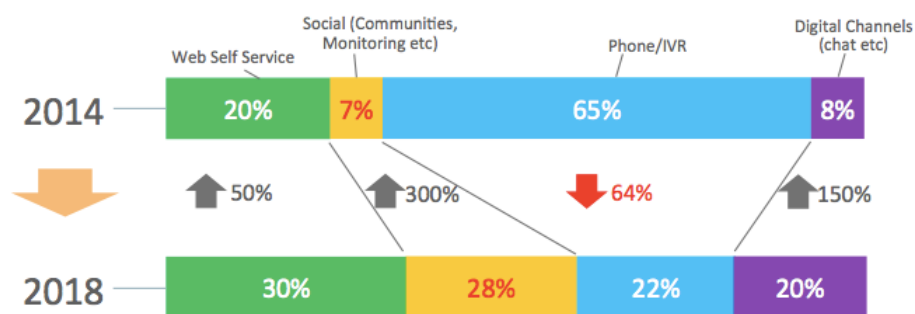
1. Customer Experience is about establishing and maintaining a strong relationship with customers.
 - Customer Service and Support is about the delivery of the brand promise, which builds trusted relationships.
2. 87% of customers will leave after one bad experience with a brand
 - 3/4 of interactions with customers happen within Service & Support.
3. 6x cheaper to grow from existing customers than to acquire new ones
 - Service and Support has less than 10% of the total budget for customer engagements.



Oracle Roadmap To Modern™ Maturing From A Cost Center In To A Profit Center

Digital Channel Shifts

- Digital channels are becoming the #1 point of contact.
 - In the past 12 months, 76% of US online adults used help or FAQs on a company's website vs. 73% who used the phone.
 - Digital channels are an engagement strategy as they drive more interactions more frequently than analog channels.
 - No longer a 'deflection' issue, but one of quality engagement.
- Digital channels require you to measure differently and holistically
 - No departmental boundaries between Marketing, Sales and Support.



Data Source: Gartner, 2014

Oracle Roadmap To Modern™ Consumer Preference Shifts To Digital Channels

	Information Assistance	Resolution Support	Compliant Service	Sales Assistance
Store	✓	✓	✓	✓ ✓ ✓
Voice	✓ ✓	✓ ✓	✓ ✓	✓ ✓
Video	✓ ✓	✓ ✓		✓
Chat	✓ ✓	✓ ✓		✓ ✓ ✓
E-Mail	✓	✓	✓ ✓	✓
Web	✓ ✓	✓ ✓	✓ ✓	✓ ✓
Social	✓ ✓	✓	✓	✓

↑ COST OF CHANNEL

ABILITY TO SERVE NEED →

Oracle Roadmap To Modern™ Multi Channel Ability To Efficiently And Effectively Deliver The Right Service

OTHER RESOURCE LINKS

Oracle Associated Links:

- **Oracle RTM Website:** <http://www.RoadmapToModern.com>
- **Oracle Service Cloud Twitter:** #OracleServCloud
- **Oracle Service Cloud Website:** <http://cloud.oracle.com/service>
- **Oracle White Paper: Modern Customer Care in a Multi-Channel World (PDF):** <http://www.oracle.com/us/products/applications/multi-channel-customer-care-2439172.pdf>
- **Oracle White Paper: Managing Customer Effort** <http://www.oracle.com/us/products/applications/customer-effort-2437445.pdf>
- **Oracle RTM Video: The Oracle Roadmap to Modern Whiteboard Video (2:41):** http://www.oracle.com/groups/systemobject/@mktg_admin/documents/webcontent/videoplayer-ocom.html?bctid=4109722896001&playerType=single-social&size=events
- **Oracle RTM Brief:** http://docs.media.bitpipe.com/io_12x/io_124257/item_1200852/24884-oracle-roadmap-modern-2644337.pdf
- **Oracle CX Blog: “Are we there yet?” The Oracle Roadmap To Modern**
- **Oracle CX Blog: 3 Steps to a Modern Profitable Service Organization**
- **Oracle CX Blog: “The Connected Customer” Oracle Roadmap to Modern**
- **Oracle CX Blog: CX Tech Adoption: Enabling the Oracle Roadmap To Modern**
- **Oracle CX Blog: Get Going on your Road To Modern**

Other Associated Industry Links:

- **Forbes Survey: Roadmap to Modern Customer Service:** <http://www.icmi.com/Resources/Webinars/Forbes-Survey-Roadmap-to-Modern-Customer-Service>
- **Kate Leggett Blog - Forrester's Top Trends For Customer Service In 2015:** http://blogs.forrester.com/kate_leggett/14-12-17-forresters_top_trends_for_customer_service_in_2015
- **Gartner Research: Toolkit: Developing a Pace-Layered Approach to CRM Service - Michael Maoz (G00273357)** <http://www.gartner.com/document/3013717?ref=QuickSearch&stkw=G00273357&rfval=154093923&qid=1aaf9358fcc7341b4dc98003d801acef>
- **Ovum Omni-Channel Strategy:** <http://www.ovum.com/research/how-to-develop-an-omnichannel-customer-engagement-capability/>
- **Constellation Research - Customer Data: The Missing Link to Strategic Success** <https://www.constellationr.com/research/customer-data-missing-link-strategic-success>
- **Consortium For Service Innovation KCS Knowledge Practices** <http://www.serviceinnovation.org/kcs/>
- **Bruce Temkin Customer Experience Matters Blog:** <https://experiencematters.wordpress.com>
- **Customer Experience Professionals Association** <http://www.cxpa.org/>

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