

## Take a Proactive Role in Customer-Centric Alignment

By Susan Hash, Contact Center Pipeline

### Take a proactive role in driving your customer experience goals across functions.

Senior executives understand the importance of providing high-quality customer experiences, but it seems that companies generally are not effective at driving customer-centric goals across the organization. According to a recent survey of customer experience professionals by Forrester Research, the majority of respondents (86%) confirmed that their companies see customer experience as a top strategic priority, and almost two-thirds said that their executives want to differentiate the company in their industry through customer experience. However, when it comes to putting high-level goals into practice, the survey showed that, overall, companies are lacking in the execution. Only about half measure customer experience consistently across the enterprise or have a companywide customer experience management program, and fewer than a third have a dedicated budget to support customer experience efforts.

If this sounds like your organization, then it might be time for you to consider what type of role you want to play in your company's customer experience management strategy, and how you can start to redefine your

position to take the lead in driving customer-centric goals.

#### Expand Your Role

The Forrester survey found that companies that had a centralized customer experience team with a single executive leading the effort were less likely to run into obstacles stemming from the lack of strategy, budget or coordination across business functions.

That's not surprising, since most organizations still operate in isolated silos that hamper crossfunctional alignment. "Even though many organizations are becoming flatter, they're still structured for productivity in functional silos," says John Carroll, global head of Synovate Customer Experience, a global research and consulting firm dedicated to improving customer experience. "The structure and culture within most organizations impedes the holistic understanding and delivery of customer experience from the customer's perspective," he says. "That's why you need a customer experience officer who can connect the dots."

Unfortunately, Carroll adds that contact center leaders

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generally are being overlooked for the role of customer experience officer or chief customer officer. Why? Some are simply not proactively pursuing the role; others are not perceived by senior leaders as being strategic enough, he says. For instance, contact center leaders often operate within their own customer service silo, focusing solely on the impacts that other departments have on call volume and service delivery. Instead, they should be developing strong business relationships with other functional leaders, and looking for ways to connect all of the customer touchpoints—"not just those within the service center, but every touchpoint that helps to fulfill the promise that we're making to our customers," Carroll explains, which includes marketing, product development, website, retail stores, etc.

If you have the desire to take the leadership role in driving the organizationwide customer experience, then you're already past the most important hurdle, Carroll says, adding that "the will is all you really need. Customer experience management is relatively new. You may not know much about it, but nobody else does either. There's no school for it, and there are very few people who can teach you about it, so contact center leaders are good candidates for the role."

## Get Your CEO to Back Your Vision

One way to get the CEO to identify you as the chief customer officer is to develop and present to him or her a customer-centric goal—not just for the contact center, but for the entire organization. You can then offer to take responsibility for integrating that goal throughout the organization, aligning the touchpoints, and ensuring that the company achieves it, says Carroll.

Setting a companywide goal to improve customer experience is not an activity that you have to, or should, tackle alone. ING DIRECT Canada's Vice President of Sales and Service David Bradshaw recommends that, before taking your plan to the CEO, you should socialize it with a few other leaders. In 2009, Bradshaw created and spearheaded ING DIRECT's three-year vision to become a world-class revenue-generating sales and service organization.

Having a plan for what you want to get done and why before you approach your CEO is key to getting top executive buy in, Bradshaw says. ING DIRECT's three-year vision was built on four strategic pillars, he explains: employee engagement, client focus, predictable and repeatable results, and effective resource management. The purpose of the vision was to elevate the contact center, to improve the overall client experience, to become more efficient

and effective, and create a culture and work environment that attracts and keeps talented people.

Some of the goals included in the three-year vision were developed to drive specific business results, such as improving employee engagement, reducing absenteeism, cutting new-hire attrition, and implementing new technology to enhance the customer experience. Bradshaw also incorporated soft goals, such as winning a contact center of the year award and becoming a contact center employer of choice.

"We wanted to get the contact center aligned around a few goals that weren't strictly numeric or attached to a dollar value because we wanted our people to be a part of something bigger, and we also wanted the organization to rally around us," says Bradshaw.

## Cultivate Key Functional Leaders

Getting CEO support for any organizationwide effort is critical, but as Bradshaw points out, you also need support and buy-in from other functional leaders.

You can lay the foundation for a good relationship with other leaders by looking at each of your company's business functions as a customer, says Tom Goodmanson, president and CEO of Calabrio Inc., a provider of contact center management and customer interaction software. "Historically, contact center leaders have focused their efforts on the external customers—the company's customers—which is exactly right. But now leaders also have to turn inward and share their knowledge with the various internal functions by asking, 'What do you need from us?' 'How can we help to solve the issues that you're having?' That will make the contact center much more relevant to the rest of the organization."

A good place to start is getting to know the leaders in your company who are involved in the customer experience and customer lifecycle, such as your chief marketing officer and the customer relationship management (CRM) team. If those functions are not currently looking at the channels that the contact center handles, and talking to you about how they're managed, then "that's where the first disconnect is," says Mary Cook, contact center industry practice manager at Varolii Corp., a software company that provides smart, automated communications. She advises contact center leaders to "make an effort to proactively go out to these other departments and talk to them about what you do and how you can be involved in their projects."

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## A NEW ROLE



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*Tom Goodmanson is President and CEO at Calabrio Inc.*

## HAVE A PLAN



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In addition, reach out to individuals in your project management leadership group—they can be your greatest asset, Cook says. “Ask them what’s on their roadmap for the next 18 months. Then tell them which projects your center might fit into and discuss how you can help.”

ING DIRECT’s Bradshaw adds that inviting executives to work in the contact center is a great way to get their support for customer experience initiatives, as well as the contact center in general. “All of our executives spend a month Y-jacking in the contact center so that they can listen to calls,” he says. “We also have the executive team handle customer complaints. We told them that, if you want to be a customer-centric organization, this is what is expected of you.

“It takes people a little bit out of their comfort zone at first, but they come to understand the role of a customer-facing associate and why the jobs are so challenging,” he says. “It also makes them realize how their own processes impact the center.”

## Use Your Top Asset: Customer Metrics and Insight

Once you have your senior executives’ attention, you will need to provide insight—both quantitative and qualitative—into the drivers of customer behavior, says Carroll. That includes the contact center’s internal operating metrics and transactional customer measurement systems to identify “terminal service failures,” as well as more strategic information to help you understand what your customers want from you and how to allocate your resources and budget to drive customer experience improvements.

“At the bottom line, the company needs to define the behaviors that it wants from its customers, which need to be agreed upon by the entire organization,” Carroll says. For instance, consider the following:

- What do we want our customers to do for our strategy to succeed?
- What attitudes do customers need to have for us to improve those behaviors from our customers?
- What are the critical moments of truth in the experiences where we have to exceed expectations of our customers and be better than our competitors?

(For an outline on modeling the relationship with your customers, see “Customer Experience

Management: A Step by Step Approach,” a white paper by Synovate; [www.synovate.com](http://www.synovate.com).)

## Tools and Technology to Collect and Report VOC Data

Fortunately, there are a lot of tools and technology available to help you gather voice of the customer (VOC) data and highlight specific insights related to improving the customer experience—and to share that information across the company.

While you have access to a great deal of data and information in the contact center via QM, customer surveys, analytics and performance management data, you only want to share appropriate slices of the business—just what is relevant to the audience that you’re targeting and present it in a format that they can relate to and understand, says Goodmanson. “Focus on snippets of information. How do you get a little piece of it, show it to the right people and make it actionable? The best vehicle for that is the dashboard,” he says. Calabrio’s WFO suite presents a personalized dashboard as a series of widgets in an open social framework, similar to the format embraced by many of the popular social media sites. Each user can choose from the widget library of performance graphs and activities, then position and configure the dashboard according to their own needs and preferences. This type of format allows each audience to zero in on the specific data points that are most relevant to them. For instance, you can have a couple of widgets that show the CFO data related to cost triggers, or ones to highlight call performance data for frontline agents.

Social media offers a wealth of insights about customers, but most companies are still in the early stages of understanding how to make use of this rapidly expanding medium, whether for information-gathering or as an interaction channel. There are a variety of social media aggregation tools that will allow you to condense all of your social media accounts (Twitter, Facebook, blogs, customer forums) into one unified desktop for monitoring. Text analytics software also allows companies to draw valuable insights from social media sites, as well as other text-based channels and feedback, such as email, websites and surveys.

An emerging trend is the combination of speech and text analytics into a unified voice of the customer—“one place for speech analytics, chat, email and social media that links all of the interactions from a single customer,” says Diego Lomanto, principal, solutions marketing, analytics, Verint Witness

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**It’s time for contact center leaders to take the lead in driving customer experience goals across the organization.**

## UNIFIED VOICE

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## BE PROACTIVE

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*Mary Cook is the Industry Practice Manager at Varolii Corp.*

Actionable Solutions, a provider of enterprise workforce optimization software and services. In fact, this month marks Verint's release of a significant upgrade to its Impact 360 Workforce Optimization solution, which will bring together web analytics, social listening and customer service interactions, both in the call center and on the Web, into a single holistic platform. The voice of the customer product, which is part of the Impact 360 WFO solution, will combine speech analytics, text analytics and customer feedback data with APIs that brings in web analytics, social media channels and other customer interaction points for cross-channel analysis, as well as individual customer behavior tracking.



**JOHN CARROLL**

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## Communicate in All Directions

If you want to establish a reputation as the go-to leader for the voice of the customer, start building it by proactively pushing out customer insights in the boardroom, in newsletters, on the intranet, in email, and in company meetings.

Remember, don't just report the metrics—understand the *why* behind customer behavior and what it means for your business, says Carroll. Then develop your story-telling skills—take lessons from your colleagues in marketing about how to tell stories that matter to the CEO, or whatever audience you're targeting.

The contact center should be the main champion of the customer experience, so in addition to sharing data related to your organizationwide customer experience goals, be sure to keep the rest of the company up to date on how your operation is meeting those goals.

“Communicate across the organization, as well as up and down,” says Darryl Flores, workforce and contact center professional service manager for SWBC, a diversified financial services company. “We send out daily dashboards to our agents, because they directly impact the performance of the contact center. We also send daily dashboards to our marketing and IT departments, to our ownership and to every aspect of the organization.” In addition to metrics and data, be sure to publicize customer compliment calls,

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## Create a Branded Customer Experience

If your organization's goal is to differentiate your company based on customer experience, then you may need to step back and consider whether your contact center is delivering on the brand promise, says John Carroll, global head of global research and consulting firm Synovate Customer Experience.

Having a contact center that achieves operational excellence is a good start, but if having a high first-call resolution rate and meeting your service level goals is all that you do, “then you're becoming a commodity that can be outsourced,” he stresses.

“Ask yourself, are we really delivering our brand in the contact center, or are we just delivering a

great experience? Watch your company's TV ads, ask your marketing and branding people what your brand stands for, and then make sure that the contact center creates a unique experience that supports that,” Carroll says. “If you call 10 different airlines and the experience is the same for each, then you're a cost center. But if you call Southwest Airlines, not only do you have a great contact center experience, it is a Southwest Airlines' experience. If you're going to differentiate and say that your brand is different from one airline to another, your contact center agents have to make that happen in the interactions. That will make your center more relevant to the organization and take you out of the box of being perceived as a cost center.”

“which speaks volumes about the level of service that your CSRs provide,” Flores adds. “It is essential for contact center leaders to communicate that type of feedback to every department to keep the contact center top of mind.”


## Expand Your Skill Sets

There is no doubt that successful contact center leaders are great operational leaders. They excel at managing the day-to-day activities, and overseeing the systems and procedures to ensure that the contact center hits its performance objectives.

However, leading a companywide customer experience initiative also requires marketing and CRM skill sets to pull it all together, says Cook, adding that: “Asking contact center operation leaders to morph into CRM and marketing folks is not easy—and it doesn’t happen overnight.”

So how can you improve your strategic focus? As

previously mentioned, a good first step is to begin developing relationships with other functional leaders. Understanding their viewpoints will also help you to start looking at “why” customers behave the way that they do (i.e., attitudes), instead of focusing on “what” they do (e.g., when this happens, then that happens).

“If you want more microphone time in front of your executives, learn how to distill the voice of the customer into a story that your CEO will relate to,” says Carroll. 

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## Create a Contact Center Roadshow

By Susan Hash,  
Contact Center Pipeline

**One of the biggest internal barriers for contact center leaders is the perception that the contact center is a cost center and doesn't bring any value to the organization.**

That viewpoint is especially rampant in organizations where the contact center physically resides elsewhere, says Darryl Flores, workforce and contact center professional service manager for SWBC. Fortunately, it's a mindset that can be changed.

Flores recommends **developing a contact center roadshow** to engage senior executives and other functional leaders. Start by putting together a team of three to five different representatives from the contact center—a supervisor, senior CSR, VP, etc. “Obviously, if you have an executive involved, you add a little more credibility,” he says. Schedule meetings with leaders from marketing,


finance, IT and other functions. At the beginning, just focus on level-setting, or as Flores calls it, Call Center 101—e.g., what is the contact center, common terminology, typical call volume, a review of last year's performance. “Then unpack the strategic direction for the upcoming year,” he says. “Let the other leaders know that you want to engage the rest of the organization in developing the contact center's key performance metrics.” Be sure to explain how each particular function—whether it's marketing, IT, product development, finance, etc.—has a direct impact on the center's performance and business results.

**“A key approach** to selling that

is to find out each function's touchpoint,” Flores adds. “The contact center has a direct correlation to the success and performance goals of every part of the enterprise, whether it's marketing's saturation rate or response rate on promotions or IT's budget, or just overall increasing the bottom line. Unless the other areas are engaged with helping to develop the metrics, they won't be on board to follow through and support the center, for instance, by letting the center know about a promotion that's going on.

**“If you're struggling** with developing the roadshow for a particular department, then I encourage you to visit that

department, find out what their goals are and ask *them* to give *you* a roadshow of what's important to them so that you can address their hot points.”

**Be sure to incorporate metrics** from every channel when doing a roadshow—not just phone metrics. Let them know the types of conversations and comments that email, chat and social media channels are producing. “That will help them to realize the depth and breadth of the impact that the contact center has on all of the organization's customers,” Flores says. 



*Darryl Flores is Workforce and Contact Center Professional Service Manager for SWBC*