

How to Successfully Map Your  
Contact Centre Environment to the  
Customer Journey



connect



“Consumers want a valued interaction and not to be treated like a number that has to be dealt with quickly.”

# Contents (click to navigate)

Introduction: The customer experience revolution	4
1) Contact Centre environments in The Age of the Customer	6
2) How to map the customer journey	8
3) How to evolve your Contact Centre environment	12
4) Pitfalls to avoid when mapping your contact centre environment to the customer journey	20
5) Choosing the right managed service solution	23
6) About Conn3ct	25

# Introduction: The customer experience revolution



‘Several years ago, we began to see that power was shifting from institutions to customers’, writes American marketing research giant Forrester. ‘Simultaneously, digital as a disruptive force was emerging. We made the call: The combination of these forces would alter market fundamentals and force companies to change strategic direction and rethink operating models. We called it the Age of the Customer.’

In this age, it is those companies that have embraced digital who are growing at a phenomenal rate. Consumers today, particularly younger generations, expect to be able to use their smartphone or instant messaging services to contact the companies they use, and when they aren’t able to do this, customer satisfaction is impacted.

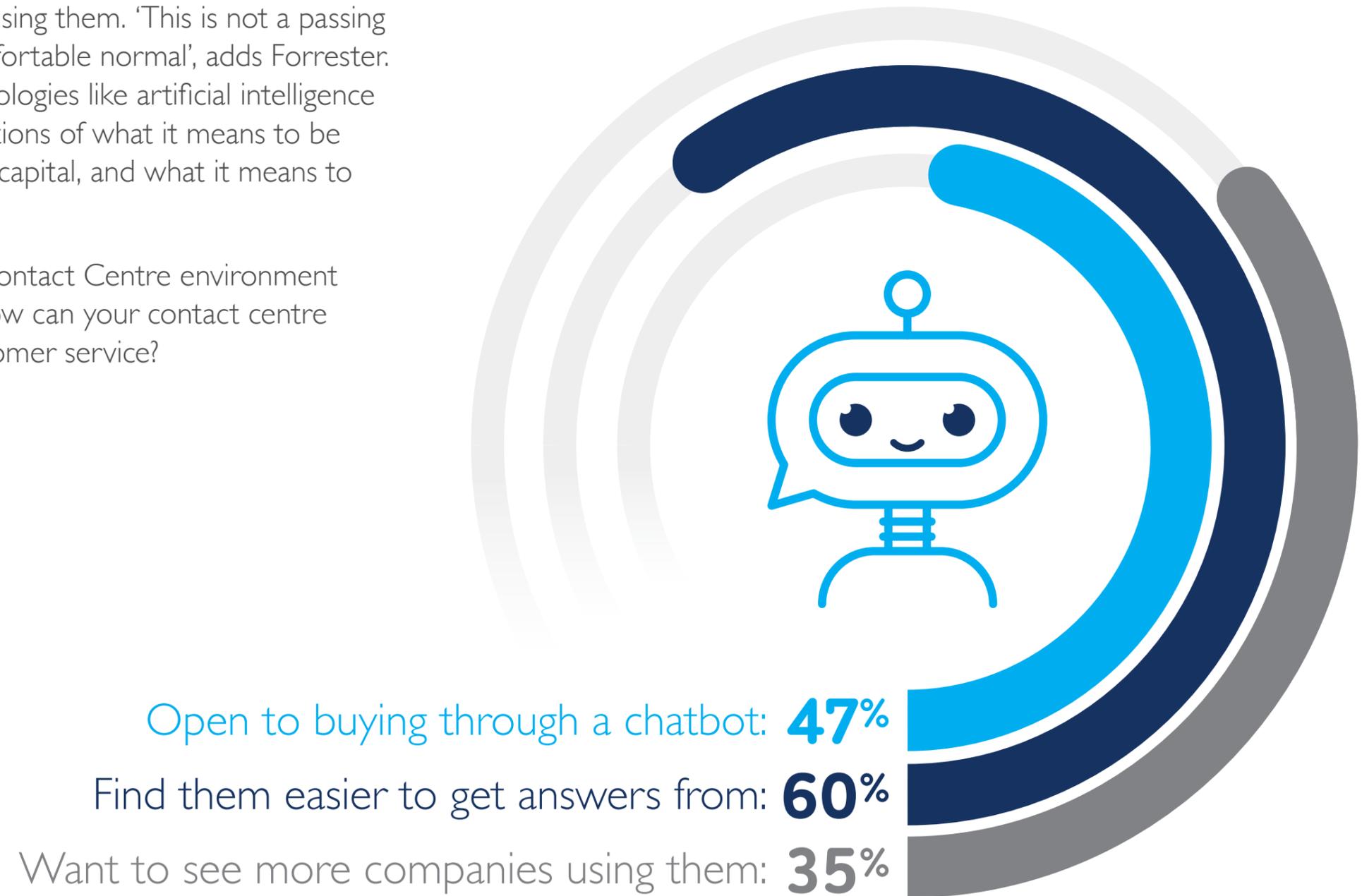
In the past, when a customer voiced their dissatisfaction at a brand, this complaint reached the ears of five or six people. Today, the prevalence of social media means these complaints reach hundreds of thousands. Businesses need to turn their customers into advocates, which means solving their problems the first time and delighting them with their service. Customer experience has become paramount.

As a result, digital players such as Apple, Amazon and Airbnb are growing while the old guard is shrinking, and in doing so they are setting a new benchmark for how businesses need to interact and treat their customers if they wish to not only grow but survive in tomorrow’s increasingly competitive digital landscape.

“Even established high street names are going under because they can’t engage with their customers digitally or deliver great customer experience.”

Another driver of the Age of the Customer is the technology enabling it. Simple processes can now be streamlined and made efficient with automation, for example. According to research by marketing automation platform HubSpot, **47%** of consumers are open to buying through a chatbot, while **60%** find them easier to get answers from. And **35%** of consumers want to see more companies using them. 'This is not a passing storm after which we will return to a comfortable normal', adds Forrester. 'These dynamics will endure as new technologies like artificial intelligence and robotics emerge to challenge core notions of what it means to be a company, what it means to build human capital, and what it means to compete and win.'

What does this mean for the traditional Contact Centre environment and cost-driven model powering it, and how can your contact centre environment evolve to deliver better customer service?



# 1) Contact centre environments in The Age of the Customer

The role of the Contact Centre is evolving at a rapid rate, driven in no small part by the customer experience (CX) revolution.

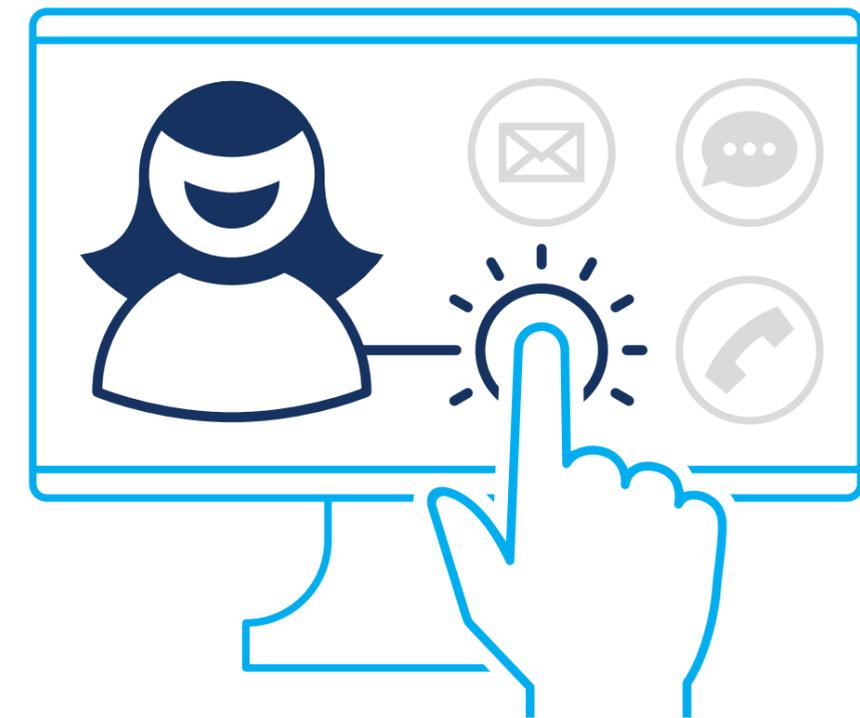
The traditional call centre environment doesn't accommodate for customer experience. The old, cost-based model, by which many call centres are still operating today, has been shaped by KPIs centred around the speed of service and cost.

Businesses moved their call centres to lower-cost countries. Call centre agents were not valued and churn was high. Customers were not treated as individuals but subjected to generic 'scripts' while being kept on hold for long periods of time. The drive to minimise average handling time (AHT) meant customers' issues often went unresolved. This led to repeated calls for each customer becoming common practice, which increases the cost to serve and impacts the customer experience. Dissatisfied customers then turn to competitors capable of meeting their service expectations, with significant cost implications. 'Depending on which study you believe, and what industry you're in, acquiring a new customer is anywhere from five to 25 times more expensive than retaining an existing one', writes Harvard Business Review.

To better retain customers, remain competitive, and adapt to the customer experience revolution, the Contact Centre environment is evolving.

'Every business we speak with has two drivers', says Martin Cross, CTO, Conn3ct.

'There's this need to digitise so that they can converse with customers in whatever channel is available, and there's the need to treat the customer as an individual, personalise their experience and solve their problem first time.'



This means understanding the journey your customers are taking when interacting with your Contact Centres. Your customers will have expectations when they get in contact. They will use different channels to contact you and the urgency of their communications will vary from moment to moment. They increasingly expect the same level of technology they experience elsewhere online and through social media channels, for example, chatbots and virtual assistants capable of engaging in natural-language type conversations that solve their issues without them having to speak to anybody. At other times, they will seek out live chat assistants. Your contact centre environment needs to provide a seamless customer journey every time.

To do this properly, you need to a) understand the forces driving the customer experience revolution and b) go through a data-driven, decision-making process.

Bring your organisation onboard with the customer experience revolution by looking at the data you currently have on how your customers interact with you and making a customer journey map to identify the pressure points. You then fix those pressure points. This is what we mean by mapping your Contact Centre environment to the customer journey.

“There’s this need to digitise so that they can converse with customers in whatever channel is available, and there’s the need to treat the customer as an individual, personalise their experience and solve their problem first time.”

Martin Cross, CTO, Conn3ct

## 2) How to map the customer journey

The omnichannel environment offers the opportunity for you to craft a series of interactions using multiple channels to support a more personalised customer experience across a customer journey for a particular business process.

The journey can be mapped across various channels, with different inbound and outbound channels supporting different stages of the journey. This offers a visual representation from which you can draw actionable insights into moments of customer truth and or pain points where customers drop off.

- What are your customer personas?
- What channels does the customer use to engage with your brand?
- How does the customer move between these channels?
- How do these channels complement one another?
- What expectations does the customer have around each channel?
- What will deter them from engaging with a channel or cause them to drop out?
- Where are the moments of truth in the customer journey, those key points of interaction that could leave a positive or negative impression of you?
- Where are the opportunities for you to delight your customers?
- How can you plan to achieve these outcomes?

A journey map should be both recognisable in the eyes of a customer and easy for the delivery team to take action from, but that isn't to say a standard blueprint exists. How you design and present the map is up to you; what matters is its content and the key steps it touches on to most accurately map the customer journey.



# 6 key elements of a customer journey map

Martin Cross, CTO, Conn3ct, recommends that a customer journey map should contain as a minimum the following elements:

## 1. Define your objectives

The first step is to identify what you would like to accomplish. The most important aspect of this step is ensuring your objectives are clear and measurable. Defining your objectives from the outset means you can begin with the end in mind; this will help you to define the path that takes you there.

Being specific about your objectives and keeping your strategic goals at the forefront of your mind will help you to map the customer journey more objectively.

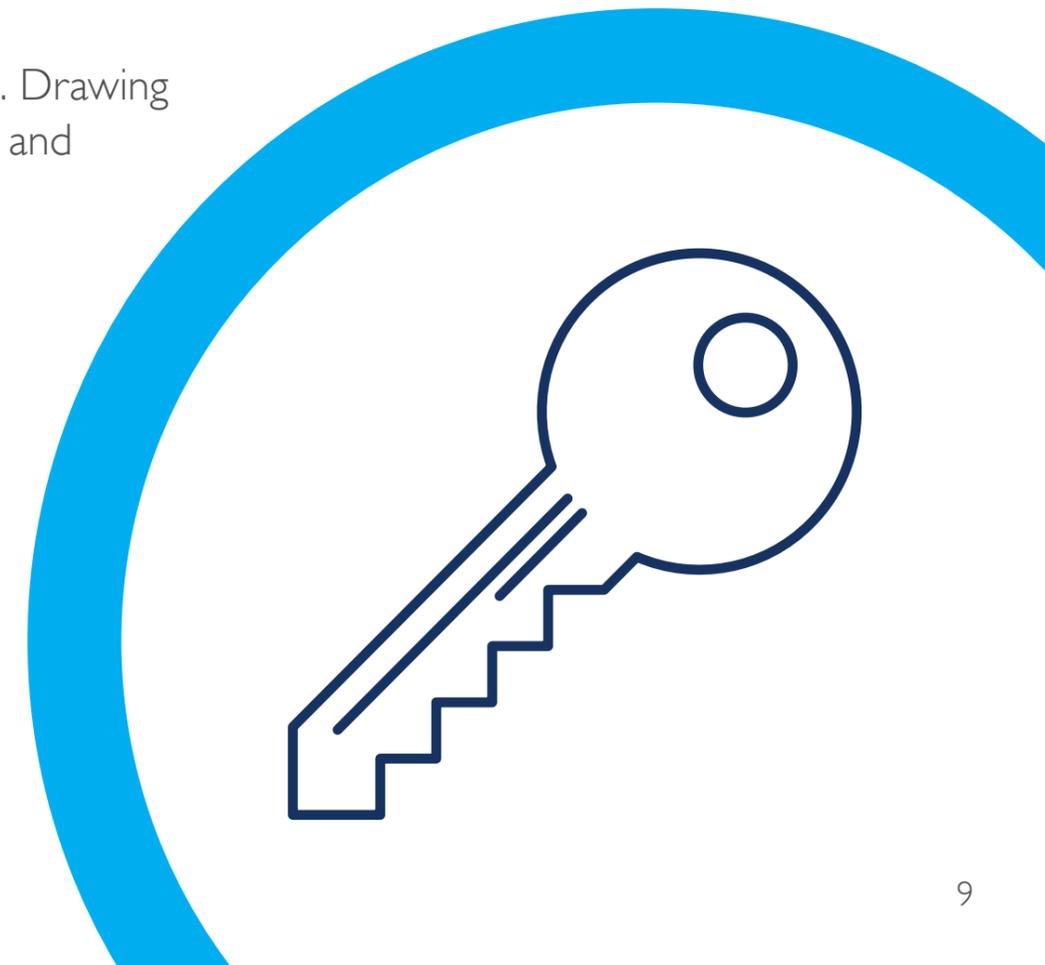
## 2. Customer personas, including their desired outcome

Your customer journey map should also include at least one customer profile or persona you have created. Drawing from your customer data, create a profile that accurately represents the customer. Describe their personal and business situation now, as well as documenting their aspirations and ambitions. What is driving them?

## 3. The journey the customer takes, including touchpoints

The third step is to list horizontally all of the actions the customer has to take in order to reach the outcome in as much detail as possible. Start from before the moment customer interacts with you to better understand what drives these interactions and where they happen. This will enable you to visualise customer behavioural patterns.

Underneath every action, list all of the channels and touchpoint services the customer encounters. This will allow you to accurately plot and understand the landscape you are in.



## 4. The moments of truth

At this stage, you should have obtained a clear picture of the moments the customer encounters your touchpoints and channels. Take some time to identify the most important 'moments of truth' (the moment a customer interacts with your brand and forms an opinion about it) in the map so far before moving on to step five.

## 5. Service delivery, right back to stakeholders

The fifth step involves detailing who is delivering the service across the various channels, particularly at moments of truth. Trace this line management as far back as you can to build up a picture of how different customer-facing business units interact internally and where accountability sits.

Continue with this method until you are left with a complete organisational blueprint and picture of the customer's emotional journey. This will help when eventually actioning the insights you learn from the customer journey map.

## 6. Iterate

The customer journey is constantly evolving so it is important that your map evolves over time to reflect this. Review the map every six months to a year, focusing on improving its accuracy and uncovering new insights. You can use creative ideation techniques such as brainstorming to achieve this for the service opportunities you identified, and/or design entirely new, ideal journeys or services.



## Validating your customer journey map

Validation is important for making sure any data or wider assumptions you have been working from are accurate and reflect as closely as possible the journeys your customers take when interacting with you. Draw from existing customer insights, relevant survey results and internal stakeholders across the business to collect their feedback and responses.



To further validate your customer journey map, seek to engage multiple segments in your customer base. Does their feedback reflect the shape your map has taken? Have you missed key steps or overlooked a pain point that could be turned into an opportunity to better serve your customers and improve their overall experience?

The more research that goes into validating the customer journey map, the more accurate, insightful and impactful it will be. The most comprehensive maps often bring together a blend of ethnographic research, contextual interviews and analysis of social data. Businesses should be able to use this research to identify interactions and steps that should be prioritised, in addition to opportunities for improvement.

The demand for customer journey maps is met by customer experience management (CXM) platforms and customer experience platforms (CXP), which allow you to map the stages and interactions of that journey, calling up various services and channels to deliver each stage.

For more information about how you could use CXM and CXP software to speed up and improve the customer journey mapping process, [get in touch](#).

### 3) How to evolve your contact centre environment

Your completed customer journey map will likely reveal that the customer journey has changed significantly from any previously documented versions as your customers have become more connected and expect more from your brand when interacting with it. It is also likely that your customers are now armed with better technology than your staff and demand a higher level of service whatever you may be offering.

The Contact Centre remains at the centre of this process, but it is no longer just a physical location with agents on phones. Instead, it represents an amalgam of technologies, processes, people and skills that can make or break a brand's reputation. With your customer journey map in hand, you can begin to align your Contact Centre environment with the moments of truth or customer pain points to better serve your customers and improve customer satisfaction.



# Different channels for different scenarios

The number of channels that consumers expect to use can somewhat complicate matters. Different channels are often suited to different scenarios. Understanding your customer journey will allow you to set up and maintain the perfect channel for any given process. Channel selection is dependent on:

- Your business
- Customer profile
- Your brand values
- The point that the customer finds the self-service during their journey

In terms of what channels to choose, chatbots and virtual assistants employed across the website (desktop and mobile) and SMS (or conversational speech assistants over video or calls) are all well worth considering.



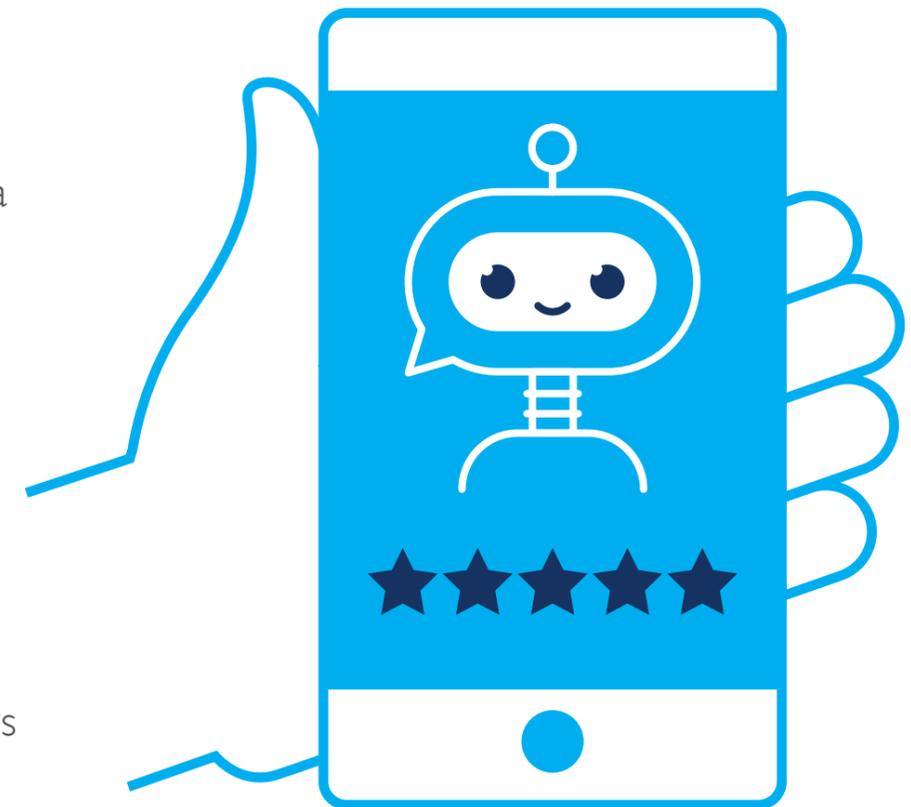
## Chatbots and virtual agents

Improvements in technology, particularly Natural Language Understanding (NLU), itself underpinned by Machine Learning (ML) and 'Big Data', mean that certain Contact Centre interactions can now be dealt with 'robotically', with a positive customer experience and, of course, without the wait often associated with speaking to a live agent. We tend to refer to these robots as 'chatbots' or 'virtual agents'.

Virtual agents benefit both the customer and the Contact Centre provider:

- Virtual agents improve customer experience by being able to solve customer requirements without the need to wait for an agent to be available.
- Virtual agents benefit the Contact Centre by allowing simpler transactions to be dealt with without the need for a 'live' agent thus reducing the number of live agents needed and so reducing costs. Live agents can then potentially be focused on tasks which are revenue generating or more complex in nature.

Today, virtual agents use natural language processing (NLP) to understand the 'intent' of a whole question (rather than looking at it as a collection of individual words). This allows customers to interact more naturally with the virtual agent as they would now with another human being. In turn, this allows the virtual agent to address more types of queries compared to previous self-service technologies.



No virtual agent can be effective without a knowledge base to work from, i.e. a virtual agent essentially needs the same 'training' or resources that a 'live' agent needs. Often the same knowledge base used by your 'live' agents and/or your website FAQs (Frequently Asked Questions) can be used by chatbots. A knowledge base can also be developed using AI techniques, i.e. machine learning and big data. By taking recordings of agents calls or transcripts of digital interactions, the virtual agent AI can build, maintain and improve its own knowledge base by learning how the best 'live' agents successfully answered given queries.

Chatbots can be used not only to support customers directly but by also assisting agents to find answers within the knowledge base or recommend 'Next Best Action'.

Customers are becoming ever more comfortable with interacting with virtual agents because of their experience with virtual assistants such as Amazon Alexa on Echo devices and Apple's Siri. In fact, the engine behind Alexa and their virtual agent is the same: Lex. Hence, it's possible to have a common experience across Amazon Echo devices, virtual agents in the Contact Centre and web chat with Amazon Lex.

Virtual agent solutions range in size and scope from the biggest, most well-known examples such as Amazon and Microsoft to those provided by broad Contact Centre technology providers Genesys and Avaya.

“Customers are becoming **ever more comfortable** with interacting with virtual agents because of their experience with Amazon Alexa and Apple's Siri.”

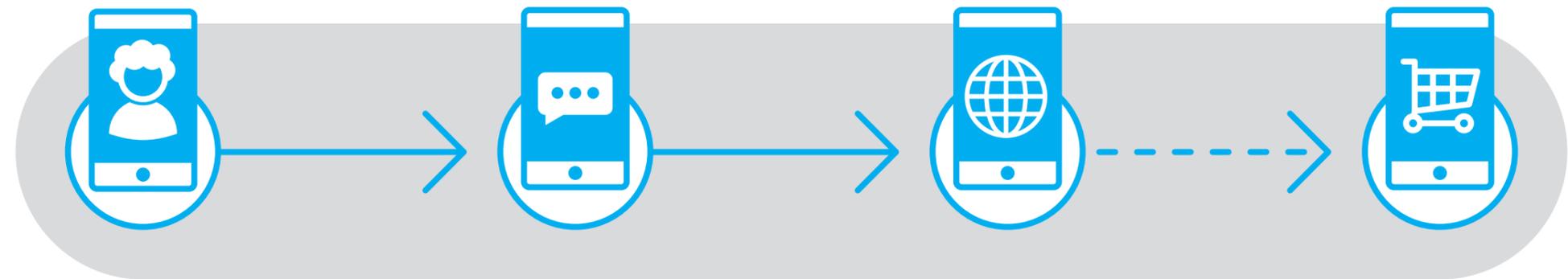
## Self-service across the website and SMS

Any inbound enquiry that requires a simple, transactional, repetitive action should be the first to be considered for self-service using the virtual agent technology described previously. Introducing it will reduce your inbound call volume and can help improve your customer satisfaction and NPS.

Using the water industry as an example, typical transactional repetitive actions would include:

- Paying a bill
- Submitting a meter reading
- Reporting a water leak

Web forms and mobile app channels can deliver self-service efficiently and help with call avoidance. Offering self-service in the channel the customer is using provides a much better customer experience and adoption rate. An example of same-device, different-channel deflection could be:



The system recognises the customer's CLI and that they are calling from a mobile phone

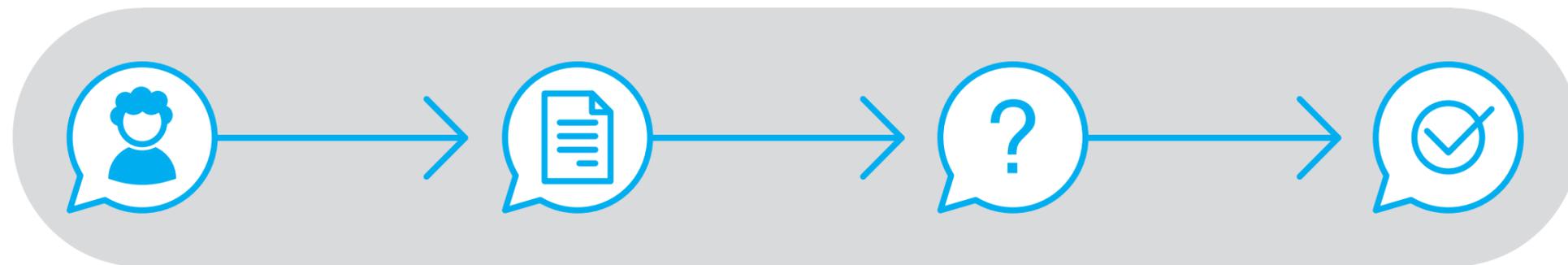
It automatically sends an SMS text to that number

The SMS contains a web-link for the customer to complete their transaction themselves on the phone's browser

Alternatively, the SMS could provide the option to perform the entire transaction over SMS (customer interacts with a conversation SMS chatbot)

In either scenario (web link or SMS chatbot), the customer completes the transaction without the need to queue or to speak to an agent. This reduces the demand for agents and saves your business money. Once a customer has successfully used this method and enjoyed the experience, it is likely that the next time they will return to it directly. The initial call 'deflection' becomes an ongoing call 'avoidance'.

Another example of same-device, different-channel self-service is using a speech-based, conversational chatbot. (See Conversational speech assistants below.) Imagine the scenario of a customer calling a Contact Centre of a utility company to provide a meter reading.



The system recognises the CLI and looks up their details in the CRM

It sees that the customer has recently been sent a meter reading reminder (in advance of the imminent billing run)

Rather than offering a set of standard IVR options, the system asks "Are you calling to provide a meter reading?"

It then handles the whole process from there without ever involving an agent

Of course, if the customer calls in and the system sees that a bill has recently been issued, it will ask them 'Are you calling to make payment?'

Each scenario delivers a personalised service each and every time they call in. How better to delight a customer?

## Measuring the impact of your changes

The evolution of your Contact Centre also calls for a review of the way in which you are tracking and reporting on overall performance. Contact Centres that continue to track AHT as their KPI will note this figure actually increasing, giving the impression that agents are being less productive when in reality they are spending longer delivering quality interactions that solve the customers' problems the first time.

This increase is not negative and may be inherent in delivering improved Net Promoter Scores (NPS) and First Contact Resolution (FCR) KPIs, both of which become much more valuable and accurate predictors of overall performance and impact in the customer-oriented Contact Centre environment.

There are numerous other measures of customer experience such as Customer Satisfaction (CSAT) and Customer Effort Score (CES), most of which are measured by surveying your customers. One way of improving this intelligence-gathering process is to deploy Voice of the Customer (VoC) technology.

“People tend to want to take time to complain rather than praise.”

In the Contact Centre, these surveys are often requested after an interaction (a call or web chat, for example). The challenge is how to best request these surveys to get the most responses as most people don't elect to take these surveys and those that do may not be a representative sample.

These surveys can be useful from both a Voice of the Customer perspective and in order to measure the quality of service provided by your agents, virtual agents or self-service toolsets. In this scenario, the post-contact survey technology is only really valuable if it is integrated into the wider call centre tech. You can then correlate the specific engagement, the agent in question (virtual or live), the recording and the survey results for subsequent analysis.



“You even have the potential to identify training or improvement opportunities, making VoC a useful measure for validating your own internal scoring and coaching.”

These surveys can be in the same channel, directly at the end of the interaction (a post-call voice form or a series of standardised questions at the end of a web chat), a different channel straight after the interaction (an SMS sent straight after) or through a different channel some time after the interaction (for example, an email sent a day after a voice call into the service centre). These different approaches all have different advantages and disadvantages and you may decide to select more than one method and have different methods for different types of interaction.

Rather than simply using to tool for measurement capabilities, it may be valuable to also use it as a mechanism to recover poor customer experience, for example providing an immediate response for any survey where the customer has given a particularly low score and turning a customer experience disaster into a smile.

## 4) Pitfalls to avoid when mapping your Contact Centre environment to the customer journey

Choosing the right technology and channels to ensure great customer service takes a blend of experience, technical know-how built up of many years and access to a wide range of vendor solutions.

To help you on your way, Conn3ct's CTO Martin Cross shares two of the biggest pitfalls you should avoid when mapping your Contact Centre environment to the customer journey.

### 1. Omnichannel isn't the answer on its own

There's a tendency for people in the Contact Centre space to use the terms 'digital transformation' and 'omnichannel' interchangeably, but the overarching change between multi-channel and omnichannel environment is that you're tracking the customer and their experience across all channels as one unified journey.

But omnichannel has become a buzzword, and often just implementing an omnichannel solution can negatively impact you and your customers because you haven't thought through that customer journey piece. Just providing communication channels doesn't solve the customer experience problem. In fact, it can create them.

Take a large, multinational holiday company as an example. This company aims to deliver good customer experience and is set up for digital. As such, they like to deal with their customers over apps and the website. This is where most of their transactions happen. Those transactions that don't happen over the web or the app are typically the most valuable to them as they're often bigger, more complex holiday packages, so they have a Contact Centre to deal with those, and it's mainly voice.



But when a consultant tells them they need omnichannel they start implementing live chat on their website, and instead of seeing NPS go up, they see it go down.

Call volumes to their Contact Centre also increase instead of decreasing. They didn't think through the customer journey. You see, the website itself is simple to use, making it very easy for the visitor to find out what they need in seconds. But if in the first second of arriving, a live chat appears asking if it can help, the visitor is naturally going to use that. So instead of them answering their own questions, they all start asking the live chats. All the traffic goes to the chat agents who are flooded with requests, customers are stuck in long queues waiting to be answered, and the company has to get in more agents to handle the calls.

NPS went down, the cost of agents went up and the service level decreased because they hadn't mapped the customer journey.

A straight implementation of live chat to make your company more omnichannel can cause the opposite effect of what you want because you haven't understood the customer journey or mapped your Contact Centre environment to it.

Omnichannel isn't the answer on its own. It's a part of the customer journey mapping solution. You decide which channel you engage at which point to make that customer journey work better.

“Just providing communication channels doesn't solve the customer experience problem.”



## 2. Don't forget voice channels in favour of digital

A trend exists that digital channels are where you should aim all of your customer service efforts and that you should abandon the old-fashioned, voice-type video channels, as it were. That's not the right thing because you're not thinking like the customer.

Customers naturally know which channel to use at what time, and that leads to two customer considerations: 'How important is the issue I'm trying to solve and how quickly do I need an answer?' If a customer is using Airbnb and the key to the house doesn't work and they are stuck outside in the rain, the natural thing to do is to phone.

They aren't going to send an email and hope they get a reply in two days' time.

If it's important and urgent, they're going to phone. If they want a quick response but it's not that important, they might SMS. If it's not important and they don't need a quick response, they may well email in their own time. If they are filling out a mortgage application that's important but not time-critical, they might book a video call.

Each of the channels available all has a different profile depending on how convenient, important and quick a response they can deliver and obviously your customer journey map will be able to identify those steps and recognise which are important.

This idea that digital is automatically the answer isn't quite true, because customers will still want to call you, so it's important you make sure you're set up for that too.



## 5) Choosing the right managed service solution

We frequently speak with prospects who want to transform their Contact Centres around customer service but don't know where to start. Other times, the business has attempted to map the customer journey or evolve their environment and run into roadblocks.

Many consultants, analysts, system integrators and technology vendors can tell you what the ideal destination looks like. The trouble is that very few of them can help you get there successfully (quickly, completely and cost-effectively). The journey from where you are today to a digitally transformed, personalised, customer experience focused Contact Centre is the real challenge.

**If you are interested in exploring this option, we have three pieces of advice to share:**



### 1. Research vendor-agnostic providers

Many providers only sell one technology, so when a customer walks in the door, their one and only product is the answer before they actually know the question. The way we see it, if you're going to provide a unique customer experience then your Contact Centre environment is going to be mapped to your business and your customer journeys, and so it's going to be different each time.

We customise the technology in the same way you want to customise the experience to maximise its effect.

To provide the best solution for your requirements, the market needs to listen to your business needs, take the time to understand what your customer journey is, understand what the pain points you're trying to overcome are, and match the perfect technologies to your environment.

## 2. Choose a provider that learns your business and existing environment

A lot of companies on the market stop at selling you the product. Yet often the product doesn't always meet all your requirements because the provider doesn't know you and your customer base and your customer journey well enough over time to identify the pinch points you are trying to address. And that is the problem with the engagement coming in at the point at which you're trying to do a project.

One approach we like to take is to come in and run your existing technology estate with you. That way, we get to learn all of the issues you have 1) in your technology and 2) in your customer journey.

There will also be things that your old technology does well that often don't get replicated in a new system because the providers didn't know it did that well.

By giving ourselves the hands on experience of running your estate, we know what it does. If we run the existing estate and really understand what the nuances are for each of your business units, we can make sure the new system replicates them. It makes that transformation to the new customer experience world much smoother and much more complete.

One Contact Centre technology vendor told us that their partners on average only have a 40% transformation success rate, so only 40% of their customers' business units move across because the other 60% are saying 'I can't do that yet because you aren't giving me what I had before'. Our approach provides for 100% because we've taken the time to learn everything.

## 3. Invest in a provider who can deliver value from day one

The bigger the estate, the longer it takes to build new technology. That can mean long waiting times until the new environment is built before your business can start implementing it and start adding value to your customers.

In a really big environment, you could wait upwards of two years before you see any value back. Our approach is to start running the existing estate and adding customer experience value from the first few months as opposed to years by implementing incremental software changes and channels at the most impactful places in the customer journey.

# About Conn3ct

Conn3ct is a truly vendor-agnostic communications partner that helps multi-site organisations across the world to solve their communications challenges by delivering simple solutions to complex problems. Drawing on over 30 years' knowledge and experience, we offer a truly vendor-agnostic solution, because we believe a fully customised, best of breed solution delivers the best outcome — typically 25% above industry standards.

'Good customer experience isn't just nice to have, it is central to the success of a business and offers a key competitive advantage', says Martin Cross, CTO, Conn3ct. 'Our goal is to manage your existing infrastructure better and more efficiently than anyone else. By doing so, we can put out any fires in your existing estate, giving you the space to look at innovation.'

As partners for all of the major Contact Centre technology providers, we recognise that we don't know the best solution for you before you walk in the door because we don't know what your journey looks like. We take the time to gain a deep understanding of your current environment to ensure anything new does not fall short of today's capabilities.

Once complete, we then start your journey by enhancing your current environment and completely transforming its capabilities so that you can transform your customers' experiences.

**To find out how we can help you, please contact us to talk through your requirements.**

8th Floor, City Place House,  
55 Basinghall Street,  
London EC2R 5DU

**[www.conn3ct.com](http://www.conn3ct.com)**

conn3ct