The five phases of DIGITAL ENGAGEMENT

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DATA SOLUTIONS

The value of a solid digital engagement strategy

Customer support teams have faced unprecedented challenges in recent months. For many companies, the tough circumstances shone a harsh light on gaps in a critical area: digital engagement.

The benefits of digital engagement have never been more clear. With a strong cloud digital engagement platform, you can operate under nearly any circumstances. Your customers enjoy shorter wait times and better, more consistent experiences. And your agents are freed from many mundane tasks. With the right strategy in place, you can evolve digital engagement rapidly.

Every company will begin from a different place. Use this ebook to determine which phase of your digital engagement journey you're in now — and how to advance to the next.

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PHASE 1

Fortify your digital service

If voice calls are your single point of failure, your first mission should be to reduce call volume. You can do this quickly with high-performing self-service solutions.

Deploy a simple FAQ widget or a chatbot.

These are great ways to provide answers fast. If you use a bot, make sure it can understand and effectively address your most common customer inquiries.

Make the widget or bot available 24/7.

And do so across all digital channels. Ensure that it always reflects the most accurate and up-to-date information. (Bonus: You don't need to keep retraining agents on this basic information.)

Use AI-powered analysis.

With artificial intelligence (AI) running on the back end, you can monitor trends and glean insights about customer needs. Use those insights to fine-tune your approach and make it easier for customers to find answers.

PRO TIP:

Start with the low-hanging fruit — frequent, straightforward questions. These types of queries fill up your phone queues. If you're not sure where to begin, ask your agents. They can probably give you a list.

PHASE 2

Amplify your digital support

Once you have basic self-service solutions in place, there's much more you can do. New digital channels and escalation paths provide even better experiences for customers and employees.

Use chatbots to triage.

Chatbots are most powerful when they're connected to your other engagement channels. This connection makes it easy to escalate more complex requests to a live agent, as needed.

Offer a smooth transition to a live agent.

Let interaction details, customer preferences and your agents' work settings determine the best next channel. A live chat or callback is often the perfect fit.

Make sure agents have the full context.

Pass along the details of the initial inquiry. This spares customers and employees the frustration of having to start the conversation from the beginning.

Simulate in-store experiences.

For interactions that should be more guided or personalised, incorporate features like video and co-browse. These elevate the experience and create stronger connections with your brand.

PRO TIP:

Encourage customers to use your digital channels. Your IVR and website are great places to let customers know they have options. If a customer is waiting on hold, offering that customer a message that offers immediate assistance on chat or your website is enticing. On your website, drive adoption through proactive chat and suggested responses.

PHASE 3

Empower your employees

Remote work has changed the way employees access information. The types of things agents can do in call centres when they need support — drop by your office, collaborate with colleagues or consult shared reference materials — are harder to do at home.

Centralise information.

An AI-powered knowledge base can fill in the gaps and empower agents to provide consistent, accurate and up-to-date information every time.

Stand up a smart advisor bot.

This bot can listen after the handoff to an agent and suggest relevant responses and information. It draws from a single, centralised source of knowledge that's accessible to all agents working from anywhere.

Learn from patterns.

Behind the scenes, AI learns from customer questions and agent answers. It can identify gaps, trends and patterns — and you can turn those into actionable insights.

PRO TIP:

In this phase, you're shifting from deflecting to becoming more proactive. Investing some time here means your whole team will spend less time looking for information and more time solving problems.

PHASE 4

Optimise your support strategy

What truly sets digital customer support apart is how easy it is to optimise and improve over time. With self-service and AI assistance for agents in place, you can start using what you've learned from customer and agent interactions to take your customer experience to the next level.

Synthesise big data sets.

With an AI-powered digital platform, there's no need to pore over call logs, recordings and notes to analyse them manually. The data is easily synthesised. Your platform should give you a big-picture view of customer experience across every channel and every step of the journey.

Focus on the strategy.

With the insights you gain, you can choose focus areas to strategically enhance the customer experience. Improve your self-service bots to deflect more calls. Bolster support on another channel where it's needed most. Provide targeted training to agents. Let the data guide your choice.

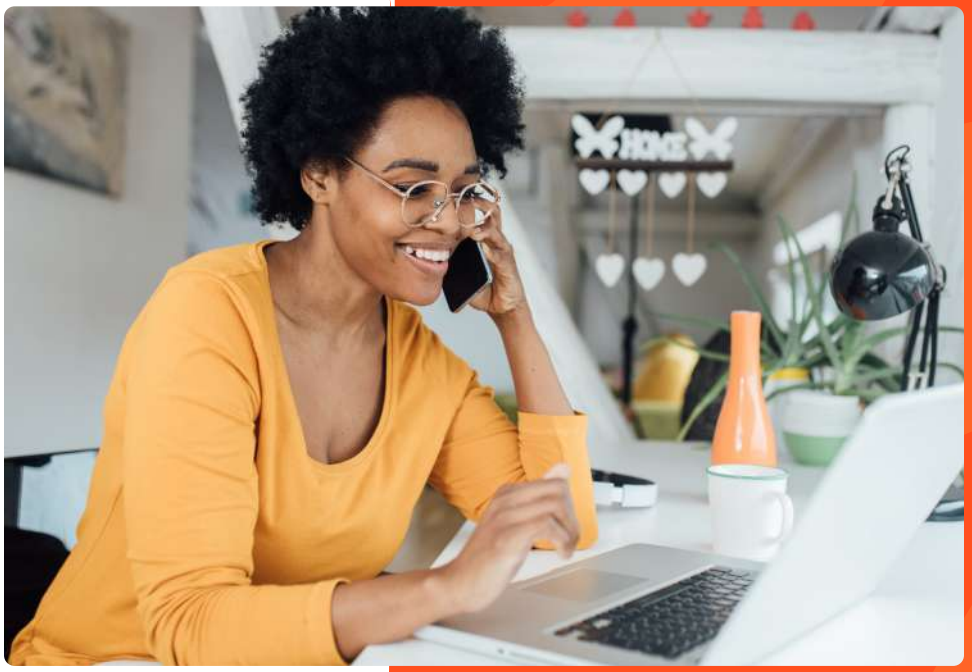
PRO TIP:

For maximum success, pair the data with input from your team. Incorporate agent feedback about what's working well and what's not — and what they need to perform better.

PHASE 5

Evolve to the next level of self-service

By this phase, you've fully deployed self-service and AI-assisted digital engagement. And you should be seeing results. Now you can look to the next evolution in digital engagement — giving bots a bigger job.



Move from information to action.

Simpler bots usually just provide information. Now you can deploy bots that actually perform actions for customers. Common use cases include completing a purchase, processing a return or transferring money.

Integrate bots with key systems.

You can integrate advanced bots with multiple, disparate systems like customer accounts information and your financial systems. This enables the transfer of data between systems so bots can complete a task.

Automate routine tasks.

Allow your customers to accomplish more with self-service and keep agents free to address more complex tasks. With bots that can do the work, you can completely automate some routine transactions and operations.

Master digital engagement

From simple self-service FAQs to conversational AI and proactive support, investing in digital engagement will position your business for success now and for years to come.

For more information, contact:

Cloud9 Data Solutions

https://www.Cloud9Data.com

sales@cloud9data.com