Analytics Beyond the Contact Center

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Don't just tell. Prove, and then instruct.

No one ever debates the *concept* that the customer experience should extend beyond the contact center. No one ever disputes the *notion* that unifying all channels, teams, departments, and systems is a crucial step on the road to customer centricity.

What thwarts progress, however, is an inability to appreciate the stakes. Aligning different departments may seem like an admirable idea, but if stakeholders do not see the immediate value in collaborating – or understand the hard costs of remaining siloed – they are unlikely to take the necessary steps toward unification.

And even if they can appreciate the theoretical importance of overcoming operational inertia, they may not know what actions to take. Embracing customer centricity throughout the organization is far easier to describe than it is to achieve.

How can companies overcome these barriers? How can they demonstrate the impact customer-facing teams have on other business units – and vice versa? How can they subsequently *guide* different stakeholders to make the necessary changes to not only better collaborate with each other but create more value for customers?

The answer is rethinking customer data as a *company-wide* asset; this report details the powerful role analytics can play in extending customer centricity beyond the *contact center*.

Why Customer Centricity Doesn't Span Departments

Today's era is one in which many business leaders know the importance of "competing on the customer experience." It is one in which ideas like customer centricity (as well as the corresponding importance of employee centricity) appear in marketing copy and corporate mission statements. Is it fair to say that companies do not appreciate holistic customer centricity? Is it accurate to say that all departments do not value the customer data acquired in contact center interactions?

The answer to both questions is still yes. There is a difference between knowing customer centricity drives success and fully understanding the role each team plays in driving that experience, as well as the impact data from individual customer interactions and journeys can have on non-customer-facing teams.

There are three key factors that inhibit appreciation for the scope of the customer experience:

No CX owner to rally the organization

In an ideal world, every stakeholder would inherently understand the value of customer data and the importance of delivering great experiences. This is not an ideal world. It takes a legitimate company champion to advocate for the importance of customer data and rally the entire organization around customer centricity.

A growing number of organizations have been installing chief experience or customer officers, but not all such executives are maximizing the opportunity. They are not using their corporate platforms to articulate just how the data their contact center teams collect can impact other business units. Similarly, they are not advising non-contact center departments on how their work trickles back down to the customer.

As a result, they are effectively *reporting* on the state of the customer experience rather than transforming it.

"Organizations often lack a cross-functional 'owner' who is mandated to improve CX across the enterprise. For example, many departments outside of the contact center either have no idea the data exists there or even if they do, they don't know how to get it or use it to their advantage. Having an owner of CX, who implements structure and puts these pieces together, will drive awareness and alignment around a CX-focused strategy." **- Scott Kendrick, CallMiner**

No unification of data

Not simply the enemy of strategic collaboration, operational silos are an adversary for actionable customer data. Without providing such intelligence to key stakeholders, brands stand no chance of extending a customer-first mindset beyond the walls of the contact center.

When key data sources and enterprise systems are insufficiently integrated, the quality of customer intelligence suffers. Companies will fail to develop a "single source of truth" that accurately highlights the voice of the customer in real-time, as well as the role each department or function plays in impacting that voice. The lack of context will reduce the urgency and accountability each team feels in the effort to elevate experiences.

But even if the data were technically perfect, fragmentation would still undermine its impact. When different departments cannot seamlessly access the *same* actionable insights, they are destined to develop different perceptions about the top needs and expectations of today's customers. This will lead to incongruous efforts and inconsistent customer experiences.

"Organizations still struggle to overcome siloed data. There are plenty of departments, like marketing or product, that could greatly benefit from the data that lives in the contact center. Their demands around data that lives in other areas of the organization need to be clearly articulated." **- Scott Kendrick, CallMiner**

No emphasis on shared outcomes

Unifying the customer experience is not simply about making all departments care about customers. It is about facilitating productive conversation and collaboration to make experiences *better*.

Many companies are failing in this regard. Marketing teams may, for example, launch campaigns without collaborating with sales (it may take a different approach to convert these new leads) or service (heavy promotion around a product may spur questions from potential buyers, as well as new tech support issues from those who do buy). These teams are, in turn, ill-prepared and the customer experience suffers.

The same problem then happens in reverse. The customer contact team does not sufficiently share insights it gathers from these new inquiries, preventing marketing from recalibrating its messaging, sales from adjusting its promises, or product development for addressing recurring issues.

The end result is a poor customer experience, regardless of how well-intentioned each individual department was.

How Analytics Can Make Customer Centricity A *Business* Reality

Within the contact center, leaders generally understand the need to prioritize *data* over *assumptions*. They know that the only way to truly understand the needs, expectations, and sentiments of today's customers is to analyze insights from interactions.

The same principle applies when working to rally the entire organization around customer centricity. Instead of simply assuming that other teams will understand the connection between their work and customer experience outcomes, successful brands use data to demonstrate and support the connection.

"At a minimum, critical collaboration is required around the democratization of data, and sharing information cross-departmentally. A clear and shared understanding of the challenges impacting the customer's experience is a necessary first step to drive collaboration. The contact center, through both voice and text-based interactions, is a rich source of such data. It is both a focal point of customer interactions capable of leaving lasting impressions, but also a destination for customers who are facing challenges seeking resolution." **- Scott Kendrick, CallMiner**

Specific analytics opportunities follow:

Understand what drives customer behavior

With a window into customer behavior, all departments can understand how the actions they take, the communication they deliver, the people they hire, and the technologies they deploy drive customer actions and affect business outcomes.

Insights generated within the contact center can provide the necessary understanding.

If the release of a new product is driving an influx of technical support inquiries, the product team can identify and address the root cause. If a misleading marketing message is spurring an abundance of customer complaints, the marketing team can refine its promotional material. If phone conversations are proving unsuccessful in retaining angry customers, human resources can revise its hiring profile while sales reviews the training it provides around customer retention.

"Customers are regularly contacting customer service departments because a service or product isn't working as it should. From those conversations, you can better understand what customers like or don't like about your product or service, what features or design elements are failing or causing the most issues, and more. These insights can help product and engineering teams improve existing offerings or introduce new products or services. For marketing teams, contact center conversations can reveal how customers feel about the brand as a whole or even specific marketing campaigns. If a specific campaign or offer isn't landing with customers, marketing teams can make updates to messaging and delivery to drive greater conversions … Similarly, accounting departments may identify issues with billing or pricing models, and legal departments can reduce friction associated with contracts, user agreements, or privacy policies – all contributing to a positive customer experience." **- Scott Kendrick, CallMiner**

To put it simply, stakeholders see how their existing strategies and operational gaps are shaping customer outcomes. They also gain a better understanding of how their own *improvement efforts* can drive meaningful, and favorable, changes in customer behavior. Customer centricity becomes the driving force behind the entire organization.

Understand what impacts customer sentiment

Understanding current behavior is not the same as anticipating future behavior. To better understand how today's actions will impact tomorrow's customer loyalty and brand reputation, it is imperative to uncover data about customer sentiment.

The contact center is a treasure trove of this information as well; natural language processing technologies and qualitative agent assessments help reveal how customers feel as they are behaving in a certain way.

"By capturing and analyzing customer interactions, such as those that happen in the contact center, organizations can uncover more insights than what surveys alone can share. These interactions contain 'unsolicited feedback' or indicators like customer emotion, sentiment, satisfaction and more." **- Scott Kendrick, CallMiner**

Customers frustrated about one late delivery may not, for example, be on the verge of jumping to a competitor. They may simply be trying their luck at getting a coupon.

On the other hand, a customer that routinely buys from a brand without complaining is not necessarily passionately loyal to that company. Merely supporting the current brand out of habit, the customer may be *very* open to switching if a cheaper or otherwise-more attractive competitor comes along.

Sentiment data provides context for these behaviors and, in turn, helps all departments more productively refine and prioritize their efforts. Marketing teams will know which customers are likely to publicly bash their brand on social media. Sales teams will know when someone is truly in a "buying mood." Product teams will be able to determine the "nice to have" versus "need to have" bugs in their existing products. Finance teams and other budget holders will know which belts can be tightened without causing customer backlash.

Pinpoint key operational improvement and collaboration opportunities

There is no limit to how much improvement a company can make. There is, however, a limit to how much improvement a company can achieve. With limited resources, all companies will have to make choices about which initiatives to pursue and which to place on the backburner.

By underscoring correlations between existing operational bottlenecks and customer pain points, contact center data can help all departments identify, prioritize, and measure their improvement efforts. The broad idea of *improving the customer experience* transforms into a specific blueprint for making real, tangible change.

Just as importantly, the transparency and democratization of such data improves collaboration efforts. Key stakeholders gain a better sense of their interconnection with other departments and can work together to carry-out strategies and achieve crucial results.

"We used the DMAIC (Define, Measure, Analyze, Improve and Control) method to build an ROI development plan, and define how people engage with our team and the CallMiner platform. We then launched a Facebook Workplace website and established a steering committee to help people see and believe in the value of our program. Conversation analytics kicks open the doors of what's possible for us. We were able to quickly and consistently add value and demonstrate insight across departments."
- **Colin Whelan, Hoist Finance**

How To Maximize The Value of CX Analytics Throughout The Enterprise

Just as believing in a unified customer experience does not suddenly remove operational silos, recognizing the power of customer data does not automatically uncover the most useful, actionable insights. It takes the right combination of strategy and technology to capture the kind of data that can elevate all facets of the organization, and in turn produce the best possible customer outcomes.

With 90% of companies acknowledging a breakdown in their customer intelligence efforts, the importance of adopting the following framework is abundantly clear:

Seize the opportunity and avoid the pitfalls of omnichannel

When it comes to customer intelligence, the rise of omnichannel is both a blessing and a curse. On the one hand, new customer touch points represent new avenues for capturing insights and developing more complete pictures of customers and their experiences. On the other hand, the growing number of data sources heightens the risk of fragmentation.

"Yet, the broader adoption of omnichannel is creating more of this unstructured data across more channels. While omnichannel communications make interactions more accessible, and customers can pick their preferred channels to engage with brands, organizations must be able to stitch together these omnichannel data points for a clearer picture of customer preferences, behaviors and journeys." **- Scott Kendrick, CallMiner**

To accentuate the strength and avoid the weakness, it is *imperative* for companies to adopt an omnichannel analytics platform *and* mindset. Leading platforms leverage AI to capture intelligence from all interactions, at all channels, at all times. They subsequently unify this intelligence to provide key change-holders with actionable, 360-degree views of their customer experiences. Those acting, whether to serve a customer, rethink a marketing strategy, or redesign a product, have a complete portrait of what customers want and how they feel.

Granted, it is not enough to simply capture and unify insights from every channel. Where the omnichannel *mindset* comes into play is to remind organizations to analyze the overall customer journey as well. Where a customer chooses to begin an interaction, and what they experience as they move between channels, can have a dramatic impact on their sentiment and behavior. It can also help companies better identify root causes, and better drive improvement.

"In our omnichannel world, even when a human ends their journey talking to another human in the contact center, their steps to get to that point are rich with information and data. All of that data, from the first chatbot interaction to having a problem solved by a contact center agent, can be captured and analyzed for a holistic view of the customer."
- Scott Kendrick, CallMiner

Unify the types of intelligence, not just sources

In customer-centric organizations, real-time interaction analytics and customer feedback are not oppositional sources. They are complements.

To provide the most complete and actionable window into the customer experience, companies leverage all *types* of data to identify key trends, uncover improvement areas, and anticipate customer intentions and sentiments.

"Aggregating solicited data, like surveys, with unsolicited feedback, teams can identify customer concerns at scale and pursue initiatives that have the biggest impact on CX and customer satisfaction." **- Scott Kendrick, CallMiner**

Upon using technology to develop the most complete portrait of the customer experience, companies can begin to *connect* the data to tangible business outcomes. When the hard financial stakes of a confusing marketing message are clear, rallying the marketing team to *refine* its efforts becomes exponentially easier.

Make actionable data accessible in real-time

Every moment of every interaction is an opportunity to not only learn about customers but add value to their experience. That outcome is only possible, however, if all relevant stakeholders have access to actionable intelligence in real-time.

Successful intelligence efforts, therefore, require a platform that can provide contextually relevant insights, to all team members, at key moments of truth. When cross-functional employees know not only what they *should do* but where, when, and how to do it, they are far more likely to take the right action.

Real-time data also helps to democratize intelligence, which in turn creates more accountability. When non-contact center teams have *first-hand access* to what is happening within the experience and how it might impact the business, they have far more incentive to participate in the journey to customer centricity.

Close internal feedback loops

In recent years, contact center leaders have embraced the idea that "data is their greatest export." It is how they can position themselves as value centers rather than just cost centers.

To truly build collaboration around data and unity around the customer experience, they nonetheless have to remember that intelligence is a two-way street. Their goal cannot simply be to encourage other departments to monitor contact center interactions; rather, it involves closing feedback loops through with open communication.

This means paying careful attention to new marketing campaigns, new product launches, new sales efforts, and new technology deployments that may impact the type of inquiries they receive. It also means providing direct guidance on how customers are responding to external initiatives, leading to continuous improvement throughout the organization.

"If the marketing team gives the contact center three new offers to use with customers and prospects per quarter, the process can't stop simply when those offers get passed to agents. Assuming that agents are up-selling customers and prospects as they're supposed to, the contact center can close the loop on if the offers are working and why. Does one of the marketing offers have a significantly lower close rate compared to the current offers or the standard benchmark? Are customers indicating that they need more of an incentive to commit to said offer? That feedback can be sent back to the marketing department, who can either tweak the offering or retire it completely in favor of a different one." **- Scott Kendrick, CallMiner**

Think beyond the customer experience

When it comes to democratizing customer intelligence, the focus is often on empowering non-contact center teams to help improve the customer experience.

It is also important to think about how customer intelligence can impact business goals unrelated to customer interactions.

Customer data can, for instance, play a big role in uncovering potential brand reputation issues. It can help companies better navigate the current hiring market. It can also help companies make better strategic and operational decisions, such as those involving mergers and acquisitions.

"By leveraging contact center data, businesses can more effectively predict brand crises, as well as better manage response and communications if and when those crises occur. These communications could start internally — explaining the situation to employees and what the company is going to do to manage the situation before it gets worse ... Contact center data can also support product innovation workflows in [other] non-CX ways. If customers are regularly mentioning a specific competitor while canceling a service or making a return, organizations can gain competitive intelligence from those interactions to inform leadership decisions, drive M&A research, or help fuel better market fit." **- Scott Kendrick, CallMiner**

Actionable Intelligence Eliminates Roadblocks To Customer Centricity

When it comes to operationalizing customer centricity, two common pitfalls often thwart success:

1) Companies do not sufficiently consider the voices and intentions of the customers when constructing experiences. No matter how well-intentioned, these unilaterally designed experiences are destined to fall short of customer expectations.

2) Departments do not sufficiently coordinate their efforts, leading to customer journeys that are fragmented and inconsistent. Even if *some* aspects of the experience are customer-centric, the journey will have some gaps and points of frustration.

By capturing the most actionable intelligence possible and then extending it *beyond the contact center,* companies overcome both challenges. With a true, unfiltered window into customer needs, wants, behaviors, and sentiments, they will never have doubt what a good experience looks like. As a result, they will never have to impose their own assumptions on customers.

When all departments and stakeholders gain seamless access not only to this intelligence but to the impact their internal actions have on the overall experience, they can maximize the value of their collaboration and efficacy of their iteration. Every facet of the company – from service, to sales, to marketing, to product development, to finance – will consistently understand the shared goals. Every facet of the company, moreover, will consistently move closer to achieving those goals.

Is every department in every company in position to instantly harness the complete power of customer analytics at all touch points? No. Will following the aforementioned recommendations quickly help all companies appreciate the impact their work has on the customer experience, and in turn create a shared sense of motivation toward improvement? Absolutely.

"Real, cross-functional insights help us increase sales, grow and retain customers, and bring new products to life. We kicked off the program with our customer care division, and expanded globally to supply chain, product, marketing and other departments. That way, you can prove the value of the technology and program with hard metrics that tie to financial results." - **Robin Gomez, Radial**

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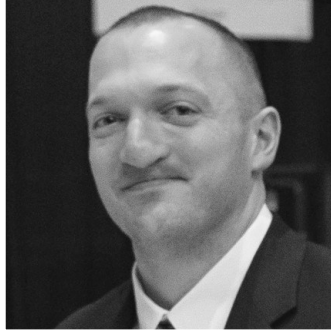
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Brian Cantor is the principal analyst and director for CCW Digital, the global online community and research hub for customer contact professionals. In his role, Brian leads the customer experience, contact center, technology and employee engagement research initiatives that drive CCW Digital's complete portfolio of content.

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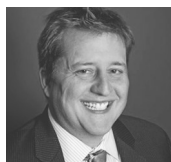Senior Analyst

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