

# Roadmap for omnichannel customer engagement a practical guide to modernizing your contact center and delivering omnichannel customer experiences

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## Introduction

Customer experience is undergoing an amazing transformation. Driven by advancements in social media, mobile, and digital technology, there are greater opportunities than ever before to deliver exceptional customer service, as well as more challenges when it comes to sustaining service levels and meeting growing expectations of today's tech-savvy customers.

The average contact center now has nine communication channels, according to the Dimension Data 2016 Global Contact Centre Benchmarking Report. To support customer journeys across these channels in a consistent manner, an omnichannel approach is imperative. Yet businesses across every industry are realizing that their existing contact center infrastructure doesn't support true omnichannel customer engagement. Many are struggling with outdated, legacy contact center infrastructure with siloed digital and voice channels that hinder customer journeys. Few have integration of current channels, and even fewer are prepared to add channels or handle the potential increase in interactions from internet-enabled devices.

With customer expectations continuing to rise, and customer experience increasingly becoming a competitive differentiator, delaying infrastructure improvements is a risky business decision. While it may seem overwhelming to make the necessary changes to support omnichannel engagement, the immediate and long-term benefits are substantial.

In this white paper, you'll learn about the key benefits of supporting omnichannel engagement and how you can make it happen.

## The omnichannel customer experience

The term "omnichannel" is commonly used in the retail industry to describe multi-path purchase experiences that take place across in-store touchpoints, online storefronts, and mobile applications. When it comes to customer engagement, omnichannel has a broader definition. Omnichannel customer experience is driven by the goal of gathering and using information and context across all engagement channels, throughout the complete customer lifecycle, for the purpose of increasing customer satisfaction, loyalty, and sales.

**Did you know?**

Along with being able to offer differentiated, consistent, and personalized customer experience across all channels, having the right infrastructure in place that supports omnichannel engagement can offer a variety of other benefits:

- Full operational control and visibility across the enterprise
- Higher revenue and lower operational costs
- More engaged and loyal employees
- Vendor consolidation and risk reduction
- Greater brand loyalty

Although most companies now have a variety of self- and assisted-service channels, this doesn't necessarily mean they offer an omnichannel experience. Most likely, they are offering a mix of siloed channels without orchestrated engagement across them. In fact, there are often technological or organizational obstacles, or both, preventing channel integration and orchestrated interactions. The result is fractured customer journeys, workforce inefficiencies, IT challenges, and an inability to capture valuable analytics to make data-driven business decisions.

Because today's customers are using multiple channels, sometimes within a single interaction, the single biggest challenge for all contact centers is integration. To enable the design, monitoring, and tuning of end-to-end customer journeys required to deliver omnichannel customer experience, you need a system of engagement that integrates existing CRM and other back-office systems, and spans all channels, touchpoints, and interactions.



## Making the shift to omnichannel customer experience

Businesses today are in the midst of a major transition in how they interact, not only with their customers, but holistically within their organization. This shift started gradually, but during the past decade, there has been increasing demand to change how businesses manage customer interactions and conduct business. Businesses running on legacy systems find themselves dealing with pain points from a multitude of areas, including aging, costly, and disparate ACD systems, siloed channels that don't communicate with each other, and operational visibility issues that hamper agent scheduling, contribution levels, and staffing to meet service level obligations.

The growing problem of trying to maintain outdated infrastructure that doesn't support today's increasingly complex customer journeys is leading many businesses to transition to a system of engagement approach that supports omnichannel customer service across all digital and voice channels. By doing so, they are able to dramatically improve their customer experience, while also meeting current and future business and IT needs.

### Defining your vision

Successfully transforming a contact center into an omnichannel engagement center begins with a business-wide shift to support an omnichannel approach. This includes developing an overriding, unifying vision, directed from the highest levels of management, to make customer experience easier and more effective for the customer. This top-down directive should also drive omnichannel engagement across every department. The vision should include goals for key areas that impact service, including:

- **Unifying previously siloed channels**—With digital interactions increasing, and voice more often being used for complex issues or as an escalation channel, the vision should be largely focused on unifying communication channels, inbound and outbound interactions, and work items to create a consistent, contextual, and personalized experience. Omnichannel customer experience is about knowing your customer and what they care about, and carrying forward context through the customer journey. Thus, the goal should be on breaking down siloed, disconnected digital and voice channels and touchpoints that are negatively impacting customer experience.

- **Making process improvements**—With a system of engagement in place that supports omnichannel customer experience, processes that affect service can be improved. These include processes that agents use while providing service to customers, as well as interdepartmental processes between the contact center and marketing, finance, quality assurance, shipping, and other departments. For example, there should be alignment between marketing and the contact center to ensure agents have access to the most up-to-date information on sales and promotions.
- **Ensuring employee success**—With customer interactions taking place across multiple channels, agents require the right set of skills and tools, including an omnichannel desktop to deliver personalized customer experience. They also need training on how to use new tools that automate content and context from multiple channels, as well as greater authority to deliver customer-centric service. This requires executives and management to be aligned with the customer experience vision and to modify business processes to support it.
- **Integrating Self-Service**—An increasing number of customers are choosing IVR and other self-service channels because of their speed and efficiency. It's important to understand how and why customers are using self-service to develop strategies that support their expectations for these digital interactions. The goal should be to reach full integration between self-service and assisted-service channels, including voice, to enable context to be carried from one channel to another to facilitate seamless, end-to-end customer journeys.

#### Evaluating existing systems and requirements

Once a business establishes a clear customer experience vision, the next step is assessing system infrastructure and how it affects engagement throughout customer journeys. Infrastructure components to consider include:

- Voice and digital channels
- Contact center infrastructure
- Employee engagement systems
- CRM, marketing automation, and case management solutions
- Back-office systems
- Branches and remote offices

Most businesses find that siloed channels are causing broken journeys, low agent efficiency, and a variety of other issues that jeopardize service quality and efficiency. There's no unified view of the customer and applications may not be used to their full potential.

#### Identifying omnichannel engagement needs

Along with creating a vision for supporting omnichannel customer experience and assessing system infrastructure needs, consider three fundamental areas when planning the move from a contact center to an omnichannel engagement center:

- **Customer engagement strategy**—Recognizing each and every customer's intent, history, preference, and identifying the next best action is key to omnichannel customer experience. By unifying all communication channels, inbound and outbound interactions, and work items, you can deliver a consistent contextual experience. Rich personalized notifications can be sent to proactively engage customers at key points in a customer journey while ensuring compliance and adherence to opt-in requirements. The result is a long-lasting customer relationship and better business results.
- **Employee engagement goals**—People are still your most important asset when it comes to delivering omnichannel customer experience. To enable agents to succeed, interactions and work items must be sent to the right people with the right skills, at the right time, and through the channel selected by the customer. Providing employees with a 360-degree customer view, a schedule that includes all channels and visibility into their performance, as well as targeted coaching to continuously improve skills you affect results. These capabilities lead to better agent utilization and effectiveness, more insightful agent scorecards, coaching sessions, training plans, and improved customer satisfaction.

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- **Business optimization needs**—Smart businesses recognize the need to modernize business processes and platforms to support an omnichannel customer experience. A system of engagement can interoperate with existing systems, supporting all channels and touchpoints, and scaling to any number of consumers, geographies, and agents. This enables centralized management capabilities to schedule correctly, ensure service levels are being met across the entire operation, and reduce total cost of ownership. Using interaction context and business rules, customers can then be routed to the best agent to address their specific needs. Tasks are streamlined, employees are empowered, and customers receive a seamless experience across their omnichannel journeys.

#### Making a platform decision

The solution for overcoming the challenges caused by outdated system infrastructure is an integrated customer experience platform that supports omnichannel customer service delivery. With a common platform as a foundation, consistent, personalized customer experience can be delivered across all digital and voice channels. Customer interactions can be managed and orchestrated within a single, universal queue to prioritize work and blend interactions across all channels to optimize the response and enable multimodal service using multiple channels concurrently. The result is seamless customer experience now with the infrastructure in place to support the adoption of new channels and applications in the future.

## Getting started

With an integrated customer experience platform in place that supports multimodality, orchestration, and journey management, you can begin delivering omnichannel customer experience, increase employee engagement, and optimize business processes and performance. These improvements can be implemented in a phased approach to minimize impact on service levels.

#### Customer engagement

Delivering a positive and consistent customer experience across multiple channels can seem overwhelming, especially when it seems like customers are starting, stopping, and resuming journeys in seemingly random patterns. Yet, a customer experience platform can enable you to transform random journeys into journeys that are deliberately designed and managed throughout the entire customer lifecycle.

To make this happen, you need first to map current customer journeys to determine where improvements can be made, and then identify those areas that have the biggest impact. With the goal of breaking down silos that prevent seamless engagement, you can begin the discovery portion of the transformation to map omnichannel customer journeys.

- **Map journeys of specific personas.** Choose personas representative of your most common or most profitable customer segments or those in which you have focused growth objectives.
- **Determine what you want to give the customer during the journey.** Consider the entire customer journey leading up to the service and afterward. This may include initial online searches through the purchase, follow up, and future proactive reminders.
- **Research methods to determine efficacy.** Your research can include reviewing data from mystery shopping, focus groups, listening to recorded interactions, and reviewing surveys.
- **Identify channels used throughout the customer journey.** It's likely that you'll be able to immediately identify specific areas where journeys are being fragmented.

Once existing customer journeys are mapped, a new service blueprint and prioritized roadmap can be created to provide actionable paths to optimize customer experience. This is a four-step process that includes:

- **Discovery**—Undergoing a customer effort audit that includes contextual interviews, contact center observations, and readiness surveys
- **Define needs**—Identifying critical needs through personas, stakeholder maps, brand values and by evaluating current customer journey maps to identify priorities
- **Design journeys**—Developing new customer journey maps and service blueprints using data collected
- **Deliver**—Designing a phased roadmap and business case that clearly describes an actionable path to optimize customer experience

### **Employee engagement**

The next step in omnichannel customer experience is ensuring that your contact center is fully integrated with your work distribution cycle. Investing in technology to optimize your customer-facing workforce yields great returns. When it is deployed in silos, however, outside teams, such as IT and sales, are confronted with excessive manual work to keep all systems and configurations aligned, and the required level of automation is not met. Integration is critical to deliver the right analytics, review agent performance, and deliver high quality customer interactions across every touchpoint.

An integrated approach automatically triggers various workflows and notifies or influences agent scheduling and routing, drastically improving business performance. An integrated approach also helps with other areas, such as being able to record and analyze all customer interactions for compliance. It offers much more opportunity for data-driven insight for managers, and can be used for employee training and improvement.

Automation drives efficiency, quality, and compliance. It positively influences the customer experience by ensuring that each interaction and work item is routed to the best agent. It also ensures that these capabilities are integrated in the contact center application to maximize your resources and deliver actionable insights for improving customer experiences.

### **Business optimization**

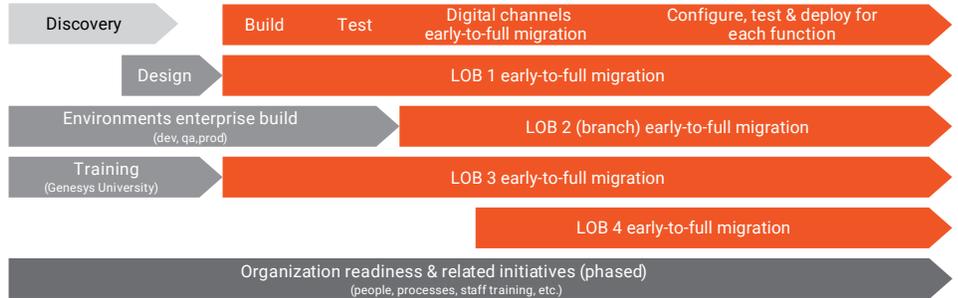
By integrating business processes and applications, you'll achieve the full impact of a customer experience platform that supports omnichannel engagement. With the platform, you're leveraging data, efficiencies, and automation, along with automating the management of back office work tasks and managing offline communications.

Contact centers are often more efficient and effective at handling different types of communication channels, such as voice, email, chat, and even social media interactions, than they are at following up on a customer conversation or managing offline work tasks. The pressure to continually add new touchpoints makes it even more difficult to meet service goals and customer demands. And, it extends into workload and workforce efficiencies. Offline work items are assigned manually and managed differently from other interaction channels. Limited insights into team workload, and employee productivity and performance across the enterprise results in frequent backlogs and missed SLAs. Without integration of your business processes, efficiency levels suffer, as they aren't typically managed through the same principles as customer interaction channels.

With rule-based prioritization offered through a system of engagement, businesses can consistently achieve promised service levels and meet customer expectations. When both calls and tasks are prioritized according to business and customer needs, you're able to operate more efficiently and effectively than ever before, which ultimately improves customer experience.

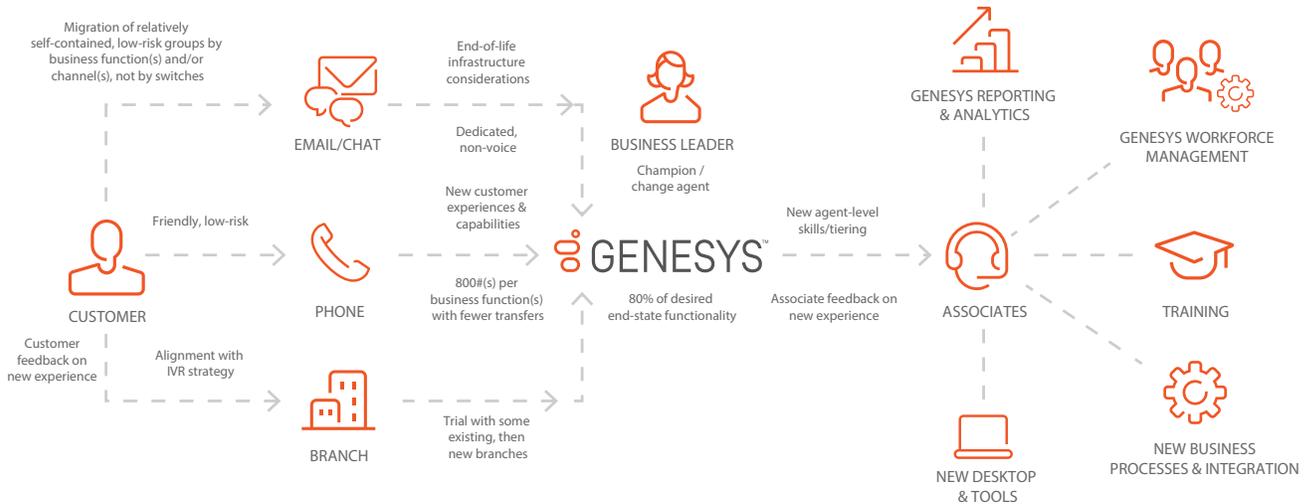
## The roll out

Most businesses don't undertake a single, sweeping transformation from a contact center to an omnichannel engagement center. Instead, there is typically a phased approach for deployment within each line of business (LOB) to maximize success and minimize potential disruptions.



Choosing where to start in the transformation from a contact center to an omnichannel engagement center is certainly a strategic decision. To minimize any chance of a widespread disruption of service, it's wise to begin with migration of relatively self-contained, low-risk groups by business function and/or channel.

Of course, a transformation of this scale is not simply a technology infrastructure replacement. Along with technology, you need to consider strategy, people, and processes. Often businesses introduce multiple systems and processes simultaneously. Thus, the desktop, tools, reporting, workforce management, staff training, and business processes should be in place first to support those on the front line with customers.



Vodafone chose Genesys to ensure their 24/7 availability with a state-of-the-art routing system that applies rules (skill, quality, and costs). The new solution involved migrating all hotlines and service staff at every location, as well as its IVR system.

## Monitoring and measuring

As part of the transition to omnichannel customer experience, you'll want to evaluate current metrics that are being measured and monitored. With a system of engagement in place, performance metrics matter more than ever. Operational metrics are still important, but they'll now need to be aligned with desired performance outcomes.

With the deployment of the system of engagement, you can obtain a single, real-time view of activity and information across all channels and systems. This includes a complete set of reporting and advanced analytics capabilities to manage customer experience solutions, helping deliver consistent omnichannel customer experience and increasing employee performance. Real-time statistics also deliver intraday management to help optimize workforce performance and operations.

## How to get there: success stories

Businesses that make the move to an omnichannel engagement center are well-positioned to meet their customers' evolving needs, while gaining the advantage of improved business workflows and processes to ensure a quality-driven and efficient modern contact center. Outdated systems put unnecessary limitations on your business and unacceptable burdens on your customers. The return on investment is clear—measurable gains in revenues and operational efficiencies, as well as vitally important returns in customer loyalty and satisfaction. The following case studies illustrate just a few examples of industry leaders that have seen the operational and cost-savings benefits at different steps in their transformation to deliver omnichannel customer experience.

### Genesys success story: Vodafone Germany

As the second largest telecommunications provider in Germany, Vodafone Germany has an extensive virtual contact center that includes ten locations and more than 4,500 inbound and outbound agents. Known for providing outstanding service, Vodafone knew they needed updated technology to continue to meet their SLAs and their customers' growing expectations.



Vodafone chose Genesys to ensure their 24/7 availability with a state-of-the-art routing system that applies rules (skill, quality, and costs). The new solution involved migrating all hotlines and service staff at every location, as well as its IVR system.

With the new solution in place, Vodafone saw a reduction in its average speed of answer by 30 seconds. This not only improved customer service, it also cut costs and boosted efficiency. The next phase in their efforts to improve service quality was to implement a natural language understanding (NLU) platform to enable customers to describe their particular issue using normal speech. The goals of this phase were to reduce the reroute rate, raise customer satisfaction, shorten IVR process times, and reduce average handling time.

Vodafone NLU slashed the time customers interact with the IVR by more than half, and their customer satisfaction index jumped nearly 20%. It also reduced their hang-up rate by a third, and self-service case completion rates increased by 15%. Additional improvements to their infrastructure included the addition of a real-time topic radar that performs statistical analysis on NLU topics, and an incident console to identify problems in a particular area and proactively respond to them.

UPMC Health Plan chose the Genesys Customer Experience Platform and a variety of solutions, including Genesys Outbound Engagement, to support their member outreach efforts. Upon implementation, they were able to increase outbound calls to promote better health to their members.

With the Genesys Customer Experience Platform, Akbank is now also able to monitor their social media, where they have more than one million followers and engage with individuals mentioning its products and services.

**Genesys success story: UPMC Health Plan**

University of Pittsburgh Medical Center (UPMC) Health Plan is the second largest health insurer in western Pennsylvania and one of the nation's fastest growing health insurance plans. Owned by the UPMC, the integrated global health enterprise includes 22 hospitals and a network of other care sites across western Pennsylvania and throughout the rest of the world. UPMC Health plan offers group and children's insurance, Medicare, dental, vision, and worker's compensation to more than 2.2 million members.



More than 240 representatives at six call centers provide omnichannel support through inbound and outbound phone (both predictive dialer and automated outbound IVR), chat, and email to UPMC Health plan members. Concerned that not all members were getting the care or services they required, they turned to Genesys to help them provide proactive inbound and outbound multichannel conversations with members.

UPMC Health Plan chose the Genesys Customer Experience Platform and a variety of solutions, including Genesys Outbound Engagement, to support their member outreach efforts. Upon implementation, they were able to increase outbound calls to promote better health to their members. With more informed members, there was also a 27% reduction in inbound call volume. They also saw many other benefits including efficiency gains in servicing different customer segments, and:

- 96% overall multi-channel satisfaction
- 95% agent multi-channel knowledge
- 96% first contact resolution
- 93% chat satisfaction
- 93% agent chat knowledge
- 92% first chat contact resolution

**Genesys success story: Akbank**

Headquartered in Istanbul, Akbank is one of the largest and most well-established financial service providers in Turkey. While many of Akbank's customers still prefer to visit a branch, a growing number are choosing to transact online or using a smartphone. This trend prompted them to undergo an omnichannel innovation to give their customers easier ways to conduct business.



Using the Genesys Customer Experience Platform for digital and self-service, Akbank transformed their internet banking portal into a self-service channel with the option of video sessions, putting a human face on online customer interactions. This was a first for Turkish banking. After announcing the new video-enabled mobile banking application in 2014, they doubled their number of direct banking customers. Customers can request a video call at a time and place of their choice. During video calls, agents receive pop-ups and use natural dialog, rather than reading word-for-word from scripts. This personal touch has differentiated their service and improved completion rates for online transactions.

With the Genesys Customer Experience Platform, Akbank is now also able to monitor their social media, where they have more than one million followers and engage with individuals mentioning its products and services. Akbank's contact center team replies to more than 2,000 posts on Twitter and Facebook each month, and has found that social media has become an important tool for them to gauge customer experience, extend customer care, and gather feedback for future services. With the technology in place, Akbank is setting new efficiency standards for financial services and continuously receives high scores in customer satisfaction.

### Genesys success story: TELUS

As Canada's fastest-growing national telecommunications company, TELUS provides wireless service and business solutions throughout Canada, as well as regional home solutions. With \$12.4 billion annual revenue and more than 14 million customer connections, TELUS knew they needed a solution that would enable them to connect customer journeys together and deliver low-effort customer experience. They reached out to Genesys to guide their "customer first" vision.



While TELUS already had industry-leading net promoter scores, they had plateaued. They wanted to know what was holding them back from doing even better. With strong competitors in the marketplace, they identified that many customers were crossing channels, and their journeys were becoming increasingly complex and high-effort. To better understand their customer journeys and improve their overall CX, TELUS chose the Genesys Customer Experience Platform with orchestrated routing to overcome siloes and to gain context in their channels. This has enabled Telus to fully understand customer journeys and improve upon them to deliver a better end-to-end customer experience.

## Conclusion

Today's tech-savvy customers expect consistent, seamless, and personalized interactions with the businesses they buy from. When they engage with a business, they want to do so on their preferred communication channels and obtain a seamless, low-effort experience. An outdated, legacy contact center platform, lacking the capabilities and functionality required to support omnichannel customer engagement, is a surefire way to put your customer experience strategy on hold.

Genesys enables your business to optimize customer experience with the tools and expertise required to support differentiated, consistent, and personalized omnichannel customer service.

The Genesys Customer Experience Platform has best-in-class capabilities, delivered with simplicity to increase first call resolutions, meet customer SLAs, improve website sales conversions, optimize cross-sell and upsell revenue from existing customers, and improve customer loyalty. It also improves employee engagement, reducing the cost of operations through efficiency gains. All of this is delivered seamlessly over all of your self- and assisted-service channels.

To learn more [Talk to a CX Expert](#) or [Request a Demo](#).

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### Key benefits of the genesys customer experience platform

- Scale up to unlimited interactions and call volumes
- Full CX capabilities for an omnichannel engagement center, supporting unlimited agent deployments and global reach
- Support for all interaction types including voice, chat, email, text, social, mobile and self-service
- Integrated self-service, analytics, workforce, and back-office optimization for peak performance
- Flexible deployment for on-premise, cloud, or hybrid cloud configurations
- Advanced capability customization to meet your unique requirements• Open platform for third-party integration to protect legacy investments and support connections to CRM, enterprise resource planning, and business process management systems

### ABOUT GENESYS

Genesys® powers more than 25 billion of the world's best customer experiences each year. Our success comes from connecting employee and customer conversations on any channel, every day. Over 10,000 companies in more than 100 countries trust our #1 customer experience platform to drive great business outcomes. Genesys on-premise and cloud solutions are built to be fluid, instinctive and profoundly empowering. Combining the best of technology and human ingenuity, we work the way you think.

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