



DIGITAL PLANNING WORKBOOK FOR CONTACT CENTERS

Thriving in the Era of Digital Transformation

7 key points to align IT strategy, business goals, and customer experience for profitable CX.

Far too many business and technology leaders view implementing cloud technology in the contact center as the end game, but it's not. Migrating to the cloud is just the catalyst for driving a value-add digital transformation to deliver exceptional customer experiences.

Achieving a successful digital transformation isn't just about adopting new technology - it's about finding, implementing, and optimizing the right technology to gain the most value for the company, its employees, and most importantly - the customer.

Get your company aligned on the digital future



Given the complexities involved and the length of time required to transform digitally, it's crucial for the entire transformation team to get and stay aligned on shared ideas, goals, and resources throughout the entire process.

To help you get the most value from your cloud-based digital transformation, we invite you and your fellow customer experience leaders to follow the prompts, questions, and tips in this workbook created by TTEC's Center for Customer Excellence.

It encourages richer conversations to identify and align cross-business unit goals with the needs of the customer - ensuring your organization's digital strategy is primed to deliver optimum value and exceptional customer experiences everywhere, every time.

ROUND UP

your transformation stakeholders, clean off the whiteboard, and start kicking around these 7 discussion points to help develop a winning strategy.



1. When was the last time you had an amazing customer experience?

Go around the table and each share a recent customer experience you enjoyed, and describe why it was so memorable.

Why did you contact the company?

What channel(s) did you use to communicate with the company?

How easy was it for you to get the information you needed?

How long did it take?

How did the experience make you feel?

▶ WHY THIS IS IMPORTANT

Drawing upon your own experiences is a good first step exercise because it helps identify "universal moments that matter" from the customer perspective and lets you explore what real-world CX success looks like. You can use these findings as you define your organization's strategy for delivering the optimal customer experience.

"You've got to start with the customer experience and work back toward the technology, not the other way around."

Steve Jobs



▶ **70%**
of the customer's journey is based on how the customer feels they are being treated

McKinsey

▶ NEXT STEPS

Pay close attention to the words your colleagues use when they talk about how the experiences made them feel – this is exactly how you want your customers to feel when they interact with your organization.

2. What does successful digital transformation look like for your business?

Discuss the goals each business unit hopes to achieve when the organization comes out on the other side of digital transformation. (For example: seamless omnichannel communications, more user-friendly systems, reduced operational costs, increased revenue, etc.)

Technical Goals	Business Goals
1	1
2	2
3	3
4	4
5	5

► WHY THIS IS IMPORTANT

The definition of a “successful digital transformation” is likely different for each of your associates. You may find IT leaders prioritize omnichannel communications where historical data and context is transferred between channels seamlessly and securely. Whereas, the business team may want to find new ways to reduce operating costs, deliver greater ROI, and contribute to a healthier bottom line.

“Your premium brand had better be delivering something special, or it’s not going to get the business.”

Warren Buffet



► **\$775M**

A moderate improvement in CX would impact the revenue of a typical \$1 billion company an average of \$775 million over three years

Customers 2020: A Progress Report

► NEXT STEPS

List out everyone’s priorities and talk about ways cloud technology connectivity can help meet each objective. This type of discussion will uncover the areas where you can optimize your new technology to deliver the company’s goals.

3. Which channels do you want your customers to use the most?

Rank the channels you want your customers to use when interacting with your brand (i.e. agent voice, webchat, email, mobile/SMS, social media, IVR/AI self-service, branch office/store, etc.).

1	2	3	4
5	6	7	8

In the table below, break down your current customer base by age. Write the approximate percentage for each category.

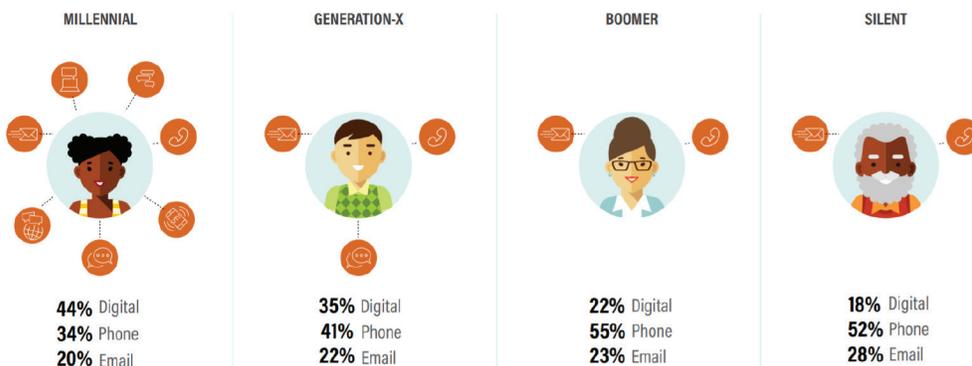
Age Profile	Current Customer Breakdown
Silent Generation: Age 73 - 94	%
Baby Boomer Generation: Age 54 - 72	%
Gen X: Age 38 - 53	%
Millennials (Gen Y) Age 22 - 37	%
Gen Z (iGen) Age 0 - 21	%

Do you envision this age breakdown changing within the next 5 years or staying static? **Why or why not?**

▶ WHY THIS IS IMPORTANT

Research shows channel preferences change based on age. So, before you decide which channels you want to invest more in or drop, it's important to consider the age breakdown of your customers with channel preferences - and then align your strategy accordingly. Otherwise, you may not deliver service the way your customers prefer to connect with you, and they will take their business to a brand who does.

Channel Preference by Generation The Northridge Group



"Make your product easier to buy than your competition, or you will find your customers buying from them, not you."

Mark Cuban



▶ **\$98B**

left on the table every year by companies who fail to provide 'simple' experiences

Siegel and Gale - The World's Simplest Brands 2018-2019

▶ NEXT STEPS

Look at your table and compare it to the Contact Channel Preference by Age Profile chart (left). Talk about whether your channel optimization goals fall in line with consumer preferences. If they do, celebrate - you're already on the right track. If they don't - talk about what needs to change to set up an omnichannel strategy that syncs with your findings.

4. What key metrics do you want to improve during your digital transformation?

Talk through and rank the CX metrics that matter most to your company in the chart below. Some examples of metrics include: reducing customer churn rate, increasing Net Promoter Score (NPS), decreasing Average Handle Time (AHT), increased Customer Satisfaction (CSAT), decreased employee attrition, etc.).

Key Metrics

1	
2	
3	
4	
5	

▶ WHY THIS IS IMPORTANT

If you don't have a shared understanding of what success looks like, you won't know if you've achieved it. Aligning on the same key performance indicators before the transition makes it easier for the organization to focus efforts and realize true success.

▶ NEXT STEPS

Look at the KPI prioritization, and discuss benchmarks and what realistic goals look like. Then talk about how the organization will track, measure, and report on progress toward attaining the shared goals.

"You never get a second chance to make a first impression."

Will Rogers



▶ **80%**
of customers say the experience a company provides is just as important as its products or services

Salesforce

5. How does your company proactively reach out to customers?

What channels do you use?

(i.e. email, social media, phone calls, SMS, etc.)

Are your outreach efforts personalized?

What prompts the need to reach out?

▶ WHY THIS IS IMPORTANT

Customers want brands to engage with them on their terms. Taking the time to plan out proactive ways to interact with your customers – on topics of interest to them, in their preferred channels, and at times convenient for them – are key to differentiating your brand from competitors.

“Get closer than ever to your customers. So close that you tell them what they need well before they realize it themselves.”

Steve Jobs



▶ **71%**
of customers recommend a product or service because they received a “great experience”

Convince & Convert – Chatter Matters: The 2018 Word of Mouth Report

▶ NEXT STEPS

Think about what additional information, services, and solutions your customers find helpful. Perhaps it's sending an SMS message to their mobile phone with a package tracking number or emailing a follow-up message to an insurance question with a link to their policy. Think about the cloud technologies you will need to establish and maintain such personalized 1:1 communications.

Build a roadmap for your organization's future digital success

Positioning your business to deliver high-level digital customer experiences that attract new buyers, encourage loyalty, maximize ROI, and differentiate your brand is crucial to thriving in today's competitive landscape. Finding the right cloud partner and developing a value-based, customer focused transformation plan is the best way to ensure your digital success.

Let's disrupt your market together.



TTEC Holdings, Inc. (NASDAQ: TTEC) is a leading digital global customer experience technology and services company focused on the design, implementation and delivery of transformative customer experience for many of the world's most iconic and disruptive brands. The Company delivers outcome-based customer engagement solutions through TTEC Digital, its digital consultancy that designs and builds human centric, tech-enabled, insight-driven customer experience solutions for clients and TTEC Engage, its delivery center of excellence, that operates customer acquisition, care, fraud prevention and detection, and content moderation services. Founded in 1982, the Company's 49,300 employees operate on six continents across the globe and live by a set of customer-focused values that guide relationships with clients, their customers, and each other. To learn more about how TTEC is bringing humanity to the customer experience, visit www.ttec.com.

