Why Did They Do That?

Unlocking Customer Value By Understanding True Intent

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ABOUT FORRESTER CONSULTING

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Executive Summary

Use the power of intent mapping to elevate CX.

In the age of the customer, understanding and mapping customer intent — and empowering employees to serve that intent — doesn't just provide a good customer experience (CX), but is simply good business. Correctly understanding whether the customer contacting you wants a simple transaction, or a complex emotion-driven interaction can save time, money, and frustration for customer and brand. Service centers are in a new world, one that embraces efficiency, great CX, and deeper engagement with the brand.

Intent mapping links the customer and employee journey in support of the next best interaction. The use of advanced technologies like artificial intelligence (AI) and machine learning (ML) empowers employees and anticipates a customer's desired next step and the motivation and emotion behind it. The firms that will win their markets in the next two to five years will use data, empathetic analytics, and empowered employees to understand why customers are interacting with a brand, so they can deliver the right message on the right channel at the right time.

In this study, TTEC commissioned Forrester Consulting to conduct a workshop with teams of TTEC contact center professionals who are trying to connect people, processes, and technologies in a new way and provide increasingly proactive customer experiences. Using current knowledge and capabilities, the teams in the workshop outlined an intent mapping methodology to clearly articulate how they can provide the next best experience for TTEC clients and their customers. The study began in January 2021 and was completed in February 2021.

KEY FINDINGS

› **Service centers need to keep up with customers.** Customers have become increasingly savvier and more demanding. Contact centers must respond with technology, advanced analytics, and empowered employees just to keep up.

› **Organizations need to think about both the customer and employees.** Firms need to use intelligent journey orchestration, which begins and ends with customer intent, to weave together the fabric of the customer journey and the employee journey. This will help them understand and anticipate customers' intentions.

› **Intent mapping helps deliver business results.** Intent mapping drives a deep understanding of why customers are interacting with a brand, allowing frontline customer experience professionals to deliver the right message in the right way at the right time. This reduces effort, elevates customer experience, decreases cost-to-serve, and drives growth.

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Meeting Customers Where They Are Is No Longer Enough

Imagine this: A retail bank customer spots an online ad for a bank she's not using that has a great rate on a vacation savings account, making her wonder if she should switch her money over to this new bank. The customer goes to her current bank's website to check her current savings account rate, which isn't paying her as much. Upon seeing this, she decides to switch to the new bank and searches for how to close her account. As she does this, a chat from her current bank pops up and connects her with an agent who lets her know that her current bank is actually offering a special vacation savings rate for long-term customers — and a useful vacation-planning guide. Magic! The retail bank customer got what she wanted and didn't have to switch banks.

What this customer likely didn't know was that she wasn't the first customer to consider the first bank's offer. Analytics from customer searches and inquiries alerted her current bank's service center team to a pattern of rate and account switching searches. The service center worked with the marketing team to discover the competitor's offer, construct a counteroffer, and layer intent information over the current customer engagement process. A customer initiating this pattern of searches or questions has probably seen the competing offer and intends to at least consider it. This orchestrates a compelling, easy-to-adopt counteroffer, encouraging the customer to keep her business at her current bank. Layering intent-based insights on analysis of data like this leads to proactively serving customer needs and wants — the best kind of win-win.

MAKING THE CASE FOR UNDERSTANDING AND MAPPING INTENT

With customers demanding more faster than ever before, great CX begins and ends with anticipating and serving the customers' next best interaction with your brand. Firms must think beyond reacting to their customers. They must get ahead of the game and understand *intent* — why is someone doing what they are doing and what will it lead them to do next? Correctly understanding whether the interaction is about a simple transaction or a complex emotion-driven interaction can save time, money, and frustration for both the customer and the brand. The following factors will drive this transformation:

› **Customers use technology throughout the buying journey to discover, explore, and demand.** There are many ways for consumers to find information, interact with brands, and get what they want at any time of day, anywhere in the world. The empowered consumer uses different devices and expects seamless integration of their experience across them. Customers are extremely savvy and self-sufficient. They can find what they need and want, and they are increasingly willing to experiment (see Figure 1). Trust is hard to build and easy to lose, and brands ignore this at their peril. As a result, understanding customers is more important — and more challenging — than ever. Brands need to collect, organize, and understand volumes of data and turn it into actionable insight in service of customers, wherever they are and however they reach out.

› **Technology that delivers actionable insights in real time to customer-facing professionals is no longer a nice-to-have.** Data is growing exponentially, but it doesn't always paint a clear picture and requires advanced analytics capabilities to craft actionable insights. Actionable insights mean measurement and execution serves the customer. The ecosystem must provide rich context to empower employees to act quickly on insights. Intent mapping layers over all the analytics models to understand the customer journey and provides insight into patterns that help predict the next possible actions or reactions. This creates a self-feeding body of learning to help orchestrate and optimize the next point of contact.

Empowered tech-enabled **EMPLOYEES**

Powerful data analytics **TECHNOLOGY**

Demanding tech-enabled **CUSTOMERS**

Figure 1: Empowered Customers Are Evolving In Five Ways

Willingness to experiment

Self-efficacy

Device usage

Information savviness

Digital/physical integration

Source: "The Future Of The Empowered Consumer In The US," Forrester Research, Inc., December 15, 2020.
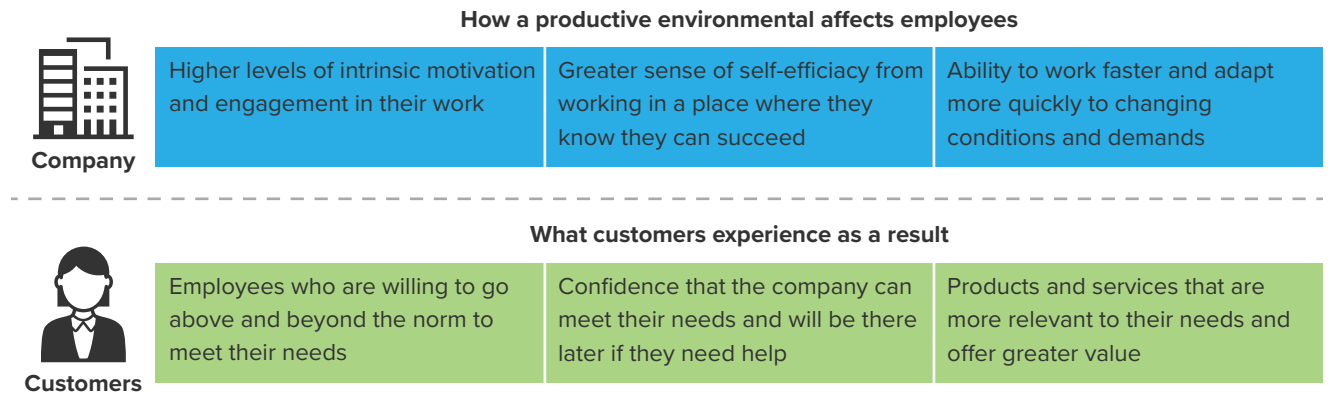
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> › **The most important and most impactful relationship with your customers is in the hands of the customer-facing teams in your business — from sales and customer service to billing and payments.** As self-service and automation increasingly handle repetitive work, agent interactions become escalation points for more complex issues.[1] These inquiries take longer to resolve and require skilled agent resources to solve the issue and temper customer frustration. Emotionally resonant, empowered "super agents" emerge to solve complex issues and provide differentiated experiences (see Figure 2).

If you outsource any customer-facing capabilities to a partner, your customers still perceive that the human with whom they interact is you. So, it is important to find partners who share the vision of an empowered, technology-enabled team dedicated to a world-class customer experience.

Figure 2: A Productive Employee Experience Drives Digital Operational Excellence

**Two Key Imperatives: Digital Customer Experience And Digital Operations Excellence**

How a productive environmental affects employees

Company	Higher levels of intrinsic motivation and engagement in their work	Greater sense of self-efficiacy from working in a place where they know they can succeed	Ability to work faster and adapt more quickly to changing conditions and demands

What customers experience as a result

Customers	Employees who are willing to go above and beyond the norm to meet their needs	Confidence that the company can meet their needs and will be there later if they need help	Products and services that are more relevant to their needs and offer greater value

Source: "Service Desk 2020: It's All About Employee Experience," Forrester Research, Inc., October 6, 2020.

Become Proactive And Empathetic

Customer contact centers are traditionally seen as transactional and largely focused on cost minimization. That culture has been challenged over the last ten years as we entered the age of customer-centricity, and technology has created an increasingly demanding and empowered consumer. Fortunately, technology also provides firms with the tools to serve today's consumer. Self-service, AI, and ML converge to automate the highest volume, most routine tasks in the service center. However, automation has revealed the perils of efficiency-only initiatives when it meets technology-empowered customers. Customer-focused firms must develop deep expertise in the following CX disciplines:

› **Customer journey mapping is the first step.** Charting how a customer navigates a particular scenario (and the choices they make in that journey) shifts the contact center from merely executing responses to measuring and learning from the customer point of view. The ecosystems must provide rich context to empower the team to act quickly on insights.

› **Data and context build the core element of intent.** Analytics teams can partner with service center operations to find trends in the data that provide insights into a customer's intent early in the customer journey. More interactions provide more data, and analytics will create an institutional learning that is constantly updated and refined with each customer journey taken.

› **Intent mapping identifies and understands critical points of frustration in the customer journey.** Empathetic analytics combine business analytics with behavioral science and psychographics to inform intent mapping with an awareness of the emotional impact at each point in the customer journey. Interactions start with understanding the customer's request and then invoking intent-based actions. Intent is informed by data gathered during knowledgebase searches and other process steps, and by analyzing sentiment pulled from things like text, audio recording, and customer satisfaction surveys. An intent library of those learnings is built and refined with each interaction contributing to the institutional memory. (See Figure 3).

› **Intent mapping must also weave in the agent journey and experience.** Technology, journey maps, and the intent library will empower the contact center team to understand a customer's conscious and unconscious intent, making it easier to resolve complex issues and engage customers (or to simply get out of their way). This is serving what the customer wants and needs, rather than trying to avoid, hurry, or push the customer into something that will not make them happy just to save a little money now.

› **A CX ecosystem that nurtures a service team growth mindset focused on continuous improvement can now exist**. The system includes a strong journey-mapping capability and data analytics tools such as:

  • Machine learning topic modeling from any source of unstructured data.

  • Predictive modeling and optimization systems.

  • Behavioral science.

  • A library capability that creates institutional memory to feed back into the intent mapping process.

Intent mapping weaves together customer and employee journeys.

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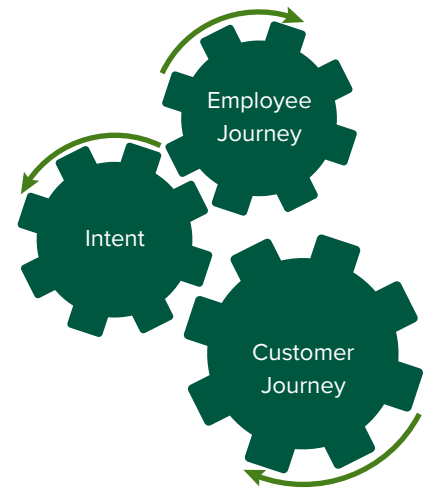
The firms that will win their markets in the next two to five years will be those who use data, empathetic analytics, and empowered employees to understand why customers interact with a brand to deliver the right message on the right channel at the right time for the best engagement with the brand. Done well, it is an elegant tapestry that will feed the bottom line for longer than just one event.

Figure 3

Intent mapping is the connective tissue between customer and agent
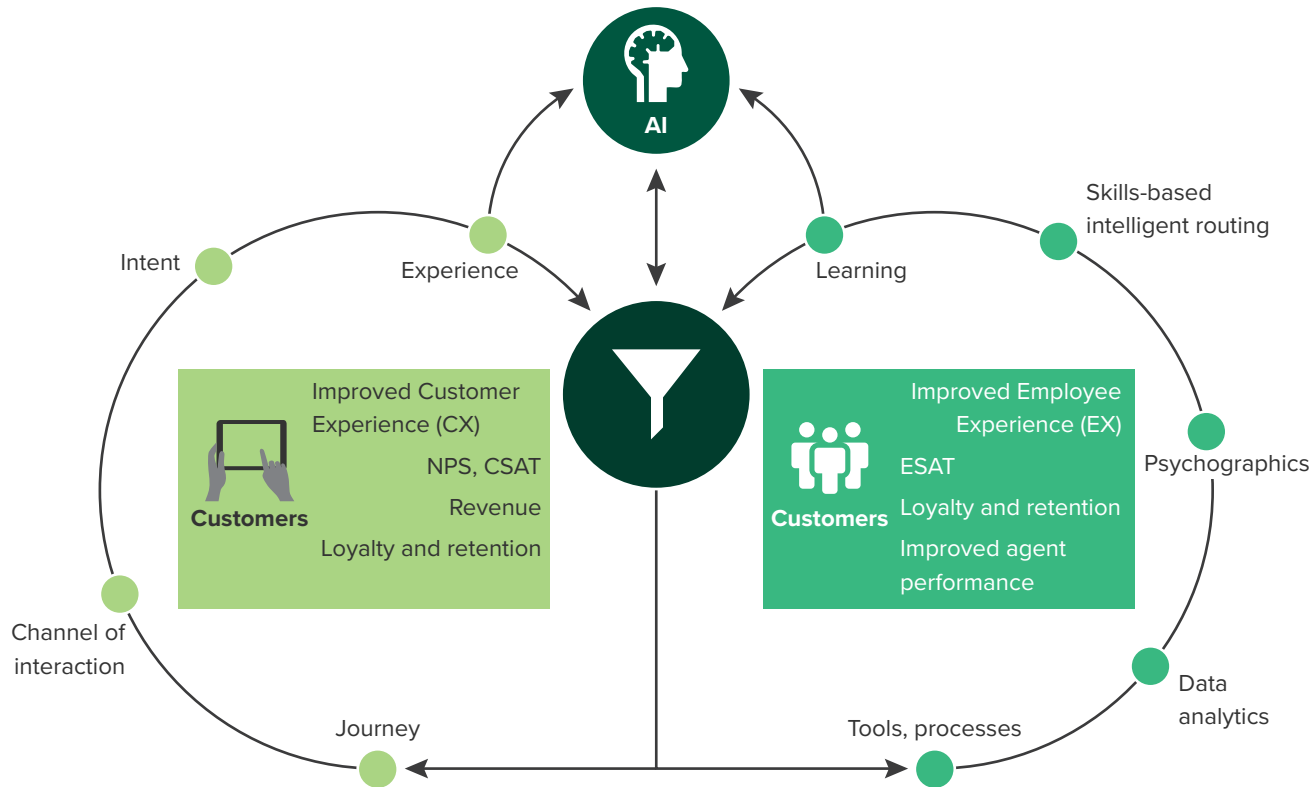
Source: A commissioned workshop and study conducted by Forrester Consulting on behalf of TTEC, February 2021.

Intent Mapping Benefits

Intent mapping creates context and understanding to determine more accurately what the next best experience is for any given customer, weaving a critical thread into CX efforts. Intent mapping then feeds the learning from that experience to better inform the next experience a customer will have. It takes customer experience to the next level by ingesting signals across the entire customer journey and providing not just a quick surface recommendation, but by using insight from analytics to provide the right one.[2]

Firms that are implementing these changes and initiatives (with their service center partners) are already seeing results. Workshop participants brought examples of how using analytics and factoring intent into a customer's journey helped improve the customer experience, as well as key business metrics:

CREDIT SCORES AND MORE FOR EVERYONE

An innovative fintech company that provides credit scores and other financial resources experienced tremendous hypergrowth when intent mapping, jumping from 1 million customers in 2010 to 80 million by 2018. The company knew that a focus on customer satisfaction and security would spur continued growth and stave off competition. Intent analytics helped identify customer satisfaction (CSAT) drivers and friction points in existing processes that could be improved, allowing the service center to propose and implement proactive solutions, including changes to customer FAQs, knowledgebase updates, and even some product changes. Customers were also proactively contacted when tax filing services expanded to their state. Within just four months, the fintech company saw a 13% improvement in CSAT. Scores steadily increased by 48% (from 54% to 80%) in one year, moving the client closer to its 95% CSAT target.

CSAT increased
48%

› **Results**

- Noticeable improvements within months.

- CSAT increased by 48%.

WHAT ARE ALL THESE CALLS FOR?

An airline company lacked a formalized system and the tools for understanding call trends to produce actionable insights. The service center team implemented a speech analytics tool to provide a view of call trends, volume, average handle time (AHT), customer sentiment scores, and driver correlations. The team quickly discovered that more than 57,000 inbound calls and chats were from members seeking assistance in retrieving their frequent flyer number (FFN). In addition to looking up the number for them, associates were trained to inform members that in the future they can retrieve their FFN, reset their PIN, and get access to other profile information through the airline's online portal or its app by using their registered email address or mobile number. This simple tidbit of information drove up adoption of convenient digital options for travelers while also driving down contact center call volume.

› **Results**

- Eighty-seven percent reduction in call volume.

- $128K in annual cost savings.

WHY ARE YOU SENDING ME THIS?!

A national energy company was experiencing significant call volumes because unnecessary payment reminder notices were sent to customers when they had already paid, advising them to call to make payment. These calls represented about 10% of the company's call volumes and were a top driver of incoming calls. These unwarranted reminders annoyed customers, causing them to rapidly lose trust in the company. The system was designed to give customers a discount for early payment. But because of the broken feature, the discount was not applied on the back end when customers paid in advance or on time. They instead received a notice demanding payment for the difference between the discount and the full rate, further adding to frustration and annoyance. In addition to customer frustration and support resources, the mistake generated unnecessary printing and mailing costs for the notices.

With their customer-experience focus and intent-mapping capabilities, the service team realized that fixing the broken reminder could save a lot of time, money, and customer frustration. The team moved quickly to initially stem the error with a digital workaround, then put in place a stronger long-term solution. First up was reducing mailing costs. The team recommended sending notices via text/SMS rather than paper. The messages were timed to ensure they were only generated after payments had passed the bank clearing period to avoid mistaken notifications. The wording in the notice was also softened to elicit more action. The program saw immediate results. Call volume dropped and that specific call type dropped from third place to tenth in call rankings. The client then implemented system changes to permanently fix the way the system handled payment collections and late payment reminders.

› **Results**

- Less customer frustration.

- Call type dropped from third to tenth on the top calls list.

Call volume reduced
87%

Annual cost savings
$128K

Call type dropped from
#3 to #10

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THIS OFFER STINKS (AND MY DAD GOT A BETTER ONE)

Associates used customer sentiment to understand the impact of a new travel promotional campaign for an airline. Of callers who mentioned the campaign, 64% expressed dissatisfaction with it in some way. A common complaint stemmed from confusion about the personalized bonus offer, such as when members of the same family received different offers. The contact center team shared these results with marketing and within two weeks, changes were made to the campaign that helped increase the Net Promoter Score℠ NPS by 2.3 points.[3]

› **Results**

- NPS increased 2.3 points.

NPS increased by
2.3 points

Key Recommendations

Intent mapping helps customers get to the heart of what they want, generating measurable business benefits — but it requires technology, strong data capabilities, and an empowered, customer-obsessed team of employees. Firms considering intent mapping should keep in mind the following recommendations:

Focus on uplifting the total experience. Successful companies understand that great service is good for business. Meeting customer expectations for quality service, however, requires an enterprise-wide effort that goes beyond customer support teams. It's also a change in culture from top to bottom, including partners.

Measure holistically. This means understanding the total economic model of your *effective* interaction investment. Look at all elements of interaction, including customer satisfaction and retention, top-line revenue, brand equity, and the fully burdened cost per interaction. Look to enrich and improve each one and make tradeoffs with the long-term impact on customer experience and retention in mind.

Don't go it alone. This is a significant investment in technology, process, and people. Find partners who are ahead of you in the journey and can help you change technology, practices, and culture without breaking your P&L.

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Appendix A: Methodology

In this study, TTEC commissioned Forrester Consulting to conduct a workshop with teams of TTEC contact center professionals who are trying to connect people, processes, and technologies in a new way and provide increasingly proactive customer experiences. Using current knowledge and capabilities, as well as actual client examples, the teams in the workshop outlined an intent mapping methodology to clearly articulate how they can provide the next best experience for TTEC clients and their customers. The study began in January 2021 and was completed in February 2021.

Appendix B: Supplemental Material

RELATED FORRESTER RESEARCH

"The Second Coming Of Digital-First Customer Service Solutions," Forrester Research, Inc., February 28, 2018.

"The Three Customer Service Megatrends In 2020: Fuse AI And Agents To Drive Better Experiences," Forrester Research Inc., January 14, 2020.

"Service Desk 2020: It's All About Employee Experience," Forrester Research, Inc., October 6, 2020.

"The Future Of The Empowered Customer In The US," Forrester Research, Inc., December 15, 2020.

"The Consumer Behaviors That Will Endure After The Pandemic," Forrester Research, Inc., March 31, 2021.

"The Five Factors That Supercharge CX Enablement," Forrester Research, Inc., February 5, 2021.

"Forrester's EX Index: A Deeper Look At The Data," Forrester Research, Inc., March 4, 2020.

"Creativity Feeds The Future Of Work," Forrester Research, Inc., March 10, 2021.

"Come Together (Right Now) To Deliver The Next Best Experience," Forrester Research Inc., February 12, 2021.

"The State Of Customer Analytics 2020," Forrester Research Inc., March 11, 2021.

Appendix C: Endnotes

[1] Source: "The Three Customer Service Megatrends In 2020: Fuse AI And Agents To Drive Better Experiences," Forrester Research Inc., January 14, 2020.

[2] Source: "Come Together (Right Now) To Deliver The Next Best Experience," Forrester Research, February 12, 2021.

[3] Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark, of Bain & Company, Inc., Satmetrix Systems, Inc., and Fred Reichheld.

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