

Guide to Building a Healthy Customer Experience

By Ruben Moffett

Virtually everyone aspires to be healthy. The benefits are broad and self-evident. But how many of us can honestly say we are living a healthy lifestyle? Most of us do our best to get some form of regular exercise. We try to eat well and care for our mental well-being, but pursuing a regimen of self-care can be overwhelming. And when we delve deep into any of these areas, it is easy to see that consistently achieving a high level of health is extremely challenging.

Despite the challenge, establishing a well-structured approach to each of these facets of health is important. This approach needs to assess an individual's current levels of fitness, priorities, capabilities and goals. However, rather than committing to a disciplined approach, people often pursue quick fixes and easy options such as fad diets and underutilized health club memberships.

Similarly, the Customer Experiences (CX) that companies provide to their prospects and customers all require investment, focus, commitment, expertise and coordination to stay "healthy." For instance, if a company's CX leaders believed they could simply invest in a best-in-class omni-channel platform, they would be mistaken to assume that subsequent interactions with customers across an array of available channels (voice, email, chat, social, etc.) would suddenly be both effective and efficient. Technology alone is not enough. Instead, companies must understand that improving CX requires widespread coordination and change across many areas within their organization. And each of these areas must align with a strategic and operational emphasis on customer. Described below are three fundamentals that, if managed effectively, can lead to the delivery of exceptional Customer Experiences.



Figure 1: Three Fundamentals of Exceptional Customer Experience

1. Organizational & Operational Model

First and foremost, the efficacy of any strategic initiative begins with executive support and alignment. If a company's culture does not set a high priority on delivering exceptional customer experiences, progress and results will be marginalized. The executive team must clearly articulate their vision for CX, their expectations related to the pace of progress, and clarity on how the organization is to support CX initiatives.

Second, at any given point there will be numerous and interrelated programs that will impact CX. There must be an operational governance model in place to keep these initiatives aligned

and progressing in a timely manner. Effectively managed, organizations can coordinate, align and prioritize these activities to achieve optimal results. However, if these efforts are not well organized, companies will miss interdependencies across initiatives, experience design gaps, and fail to realize meaningful impact based on their investment.

Ensuring organizational alignment around strategic objectives, leadership alignment around incentives, operational alignment around process changes, and building the right internal operational model (e.g., customer centricity identified and embedded in key business processes) are essential and overarching prerequisites to effective CX.

2. Connected Commerce & Seamless Support (CC/SS)

Encompassing a range of processes and technologies, CC/SS essentially covers the touchpoints and interactions companies have with their consumers. A few critical areas are explained below.

Marketing & Digital

During the first stages of the customer lifecycle, there are multiple technologies and business processes involved in driving brand awareness and cultivating consumer interest via [marketing automation](#). These form the foundation for digital marketing. Beyond the data-intensive platforms that serve as a vital foundation to manage and measure the effectiveness of marketing activities, there are also channel technologies focused on Internet and mobile interactions, and additional solutions for campaign management, customer preference management, and compliance adherence that are essential.

Omni-Channel & Workforce Engagement Management (WEM)

As mentioned earlier, [omni-channel platforms](#) are often viewed as an investment that can positively impact CX. Omni-channel migrations can also become extremely complex and require significant investment. Managing interactions across physical, email, chat, voice and social channels requires thought and planning both within the individual channel and across channels. Companies must design channel solutions that allow customers to complete end-to-end transactions within that channel or to seamlessly transition across channels (e.g., buy online or pick up in store). Going one step further, these channels must accommodate customer-acceptable automated interactions in addition to live, human-based interactions. These automated interaction systems utilize [Natural Language Understanding and Processing technologies](#) described in further detail on our website.

Frequently tightly coupled with omni-channel platforms, [Workforce Engagement Management \(WEM\) platforms](#) offer an array of capabilities related to these channels, such as training, scheduling and forecasting, quality management and interaction recording, performance management, and speech and text analytics to name a few.

With the goal of improving the quality of the customer experience, this category is especially dependent on the Data & Integrations and Infrastructure topics described below.

Customer Relationship Management (CRM)/ Applications

CRM solutions frequently receive significant focus and attention and have the potential to deliver critical and insightful information to both employees and customers. But many organizations have not standardized on a single system of engagement and consequently rely on a variety of systems of engagement and systems of record. This fragmentation can be cumbersome for employees to navigate while interacting with customers, and challenging to integrate with automated processes and systems. Companies are sometimes able to address these challenges by implementing stop-gap solutions such as [Robotic Process Automation \(RPA\)](#) or external Knowledge Bases.

Customer Experience Systems

CX can be extremely complex, and companies should invest in processes and technologies that both organize and align these processes while providing accurate insight into actual CX performance. Frequently, CX systems are investments that are deprioritized (or only given limited time and investment) until after solid Digital Marketing, Omni-Channel, WEM and CRM solutions are in place. Some of these systems come in the form of design such as service blueprints, customer journey maps and journey orchestration, and others gather and analyze customer feedback and sentiment. As companies' CX capabilities mature, this area can become a central point for executives to gain insight into design progress by providing visibility into overall CX performance.

If you are interested in more details about service blueprints and customer journeys, please download our white paper, [Holistic Approach to CX Design](#).

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3. Data, Integrations & Infrastructure

Exceptional CX necessitates investment in an array of technology solutions and those solutions require data to be effective. From marketing automation tools to digital and omni-channel platforms, to systems of engagement and systems of record, availability of data will enable exceptional CX design and empower employees to provide valuable and effective engagement with customers. In addition to a powerful data infrastructure, modern interfaces will allow these disparate systems to exchange data in real time. Ensuring that your organization has sufficient data and integration capabilities is a critical foundation for many of the required CX technology solutions.

Advanced organizations are going one step further by leveraging Artificial Intelligence and Machine Learning to quickly analyze extremely large data sets identifying patterns and delivering insights that can be used to provide proactive and prescriptive sales and service to customers. [These AI and ML technologies are covered in more detail on our website.](#)

And lastly, many companies still use on-premises solutions, but many modern CX platforms are cloud-based and require a very different architectural design. From robust network capacity to modern cloud-based technology platforms,

companies must ensure a secure and high performing computing environment is in place as they move to cloud-based solutions.

To gain deeper insight into two critical topics central to this subject, download our information on [Microservices](#) and [DevSecOps](#).

To be effective in all three of these foundational CX categories, organizations must commit adequate time and resources and effectively manage numerous and complex projects requiring both expertise and experienced leadership. Similar to one's personal health, there are countless, new quick fixes that pop up in the market seemingly every day. While they may play a part in a holistic CX design, they are not a silver bullet. There are no miracle diets delivering world-class CX. Instead, if an organization commits to a well-structured approach spanning each of these fundamental areas, these investments will return dividends in terms of the exceptional experiences that customers have with your brand and their perception of, and loyalty to, that brand.

Cimphoni has deep experience designing and leading both strategic and tactical programs and projects in these areas and can assist your company as you walk down the path toward internal CX competencies and self-sufficiency. Please contact us if you are interested in a CX health coach or trainer.

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ABOUT THE AUTHOR

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Ruben is a senior leader who combines extensive technology, operational and business expertise to help clients maximize and align technology with their strategic objectives. Ruben's specialties include customer experience, workforce optimization, business intelligence, software development, infrastructure, cloud solutions and professional and technical services management. He is a graduate of Cornell College and holds an MBA from the University of Iowa. Ruben spends his free time playing hockey and attending his children's soccer games, cross country and track meets and dance competitions.

About Cimphoni

Cimphoni is built on the premise that technology, when properly applied and led, can deliver innovative solutions that transform businesses, enrich the products we use daily and improve the quality of our lives. The Cimphoni team is comprised of highly experienced technology and business leaders with a thirst for innovation and a passion for solving problems. Founded in 2012, we serve customers throughout the United States from our offices in suburban Milwaukee.

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If you would like to enhance your understanding of the customer experience you are delivering at your company, please contact us at (888) 470-0448 or info@cimphoni.com. We can help you improve every step and every touchpoint in your Customer Journey.