

Delivering World-Class Digital CX



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Introduction

AI and other emerging technologies are poised to drive unprecedented improvements to the customer experience (CX) that companies provide through digital channels. But realizing these gains won't just be a matter of rolling out advanced systems. Enterprises must first understand where improvements are needed and when the challenge is rooted less in technology than in the company's own understanding of its customers and processes.

For example, new technologies promise great improvements in digital self-service—but only if the enterprise understands the current state of its self-service. And many don't; they underestimate the self-service challenge. Recent survey data from NICE indicates that 81% of customers want better self-service, while companies believe that number to be just 60%. And 36% of consumers want more intelligent self-service, but only 11% of businesses are making this a priority.

One of the keys to raising your digital CX game is understanding the role that knowledge management plays in enabling truly effective self-service. Keith Dawson, Vice President & Research Director at Ventana Research, put it this way in a recent NICE webinar: "Self-service without knowledge management is an absolute recipe for customer frustration."

Another critical factor in achieving world-class digital CX is meeting customers proactively, anticipating their needs and providing the tools that both agents and customers need in order to streamline the process of getting the answers and resolutions required. Modern digital CX technology makes proactive customer engagement easier and more effective than ever—but again, you have to understand how best to deliver these for your enterprise and your customers.

These are just a few examples of the opportunities and challenges posed by the new world of digital CX. This e-book is intended to help you make the connection between the opportunities presented by new technologies and solutions, and the strategies it will take to attain this new level of world-class engagement. We've gathered in-depth information and insights from some of the industry's leading analysts and subject matter experts, and excerpted the most critical points in the pages that follow. Our goal is to give you an overview of the thought leadership in this space, with links to the complete

resources so that you can do a deep dive on those areas that are most timely and offer your enterprise the most immediate wins.

Here are the insights you'll find in the pages that follow:

- **Digital First: Bridging the CX Divide:** Learn about the five key areas where consumer expectations don't match business reality
- **Four Pillars for a Best-in-Class Digital Experience Program in 2023 (and Beyond):** See what Aberdeen Research identifies as the keys to success in building your digital CX strategy
- **The ROI of Smart Self-Service: Using Modern Tools to Delight Modern Customers:** As we delve into one of the major elements of world-class digital CX, learn the benefits of raising your game from basic self-service to smart self-service
- **How Can I Increase Customer Engagement with Self-service and Knowledge Management?** As noted above, knowledge management is the foundation of effective self-service that satisfies your customers. This conversation between NICE and Ventana Research lays out the best practices for making the connection.
- **CX in the Era of Intelligent Self-Service:** Learn how Opus Research sees leading-edge technologies underpinning and delivering on your self-service strategy.
- **6 Ways to Meet Customers Proactively on their Digital Journey to Increase Customer Lifetime Value:** As important as self-service is, you can't just sit back and assume customers will be able to meet their own needs. See how you can build a strategy for proactive engagement.
- **Why GPT, Why Now, and What's Next?** Conclude your exploration with a look into the future: Hear from thought leaders at NICE about where generative AI is headed, and what role it will play in advancing the digital CX trends we've been discussing in this e-book.

The future of customer engagement is digital, and industry leaders like NICE stand ready to help ensure your enterprise can deliver world-class CX in whatever way your customers desire. We hope this e-book inspires you to be ambitious in your drive for this superior level of CX, and also helps assure you that the tools and strategies are readily available to equip you in fulfilling that ambition.



Digital First: Bridging the CX Divide

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A bridge connects places, people, ideas, and much more. As the world continues to connect, innovate, and grow, the need for bridges, figuratively speaking, has never been more critical. As needs grow, so do opportunities, and capitalizing on those opportunities separates the successful from those who get left behind.

The need for bridges is paramount in the CX world as companies communicate, or attempt to communicate, with their customers. However, there is a divide separating customer expectations from business reality. This gap comprises a shortage of smart self-service options, a lack of personalization, or frustrating digital journeys that lead to negative interactions.

NICE’s “2022 Digital-First Customer Experience Report” is based on a survey of 1,000 consumers and 320 business and contact center leaders that asked them about digital-first customer service. The responses show that the existing CX bridges are not meeting customer expectations, and updates need to be made to build greater brand loyalty and provide an exceptional and seamless customer experience.

There are five key areas from the report where consumer expectation and business reality don’t match, including:

- Self-service
- Brand loyalty
- Smarter offerings
- Options
- Customer experiences

Consumers demand excellent customer service, and as the “2022 Digital-First Customer Experience Report” shows, CX impacts brand opinion and loyalty significantly. You can download

NICE’s complete e-book that summarizes the “2022 Digital-First Customer Experience Report” [here](#).

Building a CX bridge that can surprise and delight customers is not just a good idea, it is vital. There is no magic formula or wand that grants perfect contact center execution. There are only bridges that connect customers with businesses, and if the CX bridge is updated and well maintained, there will be a strong relationship and connection between them. That connection builds greater loyalty, increased revenue, and happy, delighted customers with expectations exceeded in every interaction.

So how do you start building that bridge? Read on to learn about the Four Pillars for a Best in Class Digital Experience program.





Four Pillars for a Best-in-Class Digital Experience Program in 2023 (and Beyond)

Aberdeen Strategy & Research

Although contact center leaders face a number of challenges, they also find creative ways to overcome them. To this point, findings from Aberdeen’s Contact Center Trends survey revealed a leading group of businesses that excel in achieving superior results in CX, operational and financial metrics. These Best-in-Class firms master modern digital experience programs, and as a result reap the rewards of their savvy approach. Shared across the Best-in-Class are four pillars of success that enable them to excel in total CX excellence when managing activities across all digital channels:



1. Make Self-Service an Integral Part of Your DX Activities
2. Use the Power of Knowledge to Supercharge Agent Productivity & Self-Service Experiences
3. Put Customers at the Center of Your Digital Experience (DX) Program
4. Deploy Proactive Engagement

These pillars are covered in detail in the Aberdeen report, “Four Pillars for a Best-in-Class Digital Experience Program in 2023 (and Beyond),” which you can download [here](#). This report provides an actionable and detailed overview of how top performing business leaders build and nurture DX programs that differentiate them.

Many business leaders still think of digital experiences as adding more channels within their channel-mix and try to align use of digital channels with existing company goals and processes. This must change. Best-in-Class firms in digital experience management take a different approach. Theirs is one that puts customers at the heart and center of DX activities, designed to adjust company processes based on ever evolving client needs and behavior. In turn, customers of these firms reward them. Best-in-Class firms enjoy superior customer loyalty, better operational efficiency, and financial wellness.

Read on in this [ebook](#) for a deeper dive on the first pillar in our list—Self-Service.



The ROI Of Smart Self-Service: Using Modern Tools To Delight Modern Customers

Aberdeen Strategy & Research

Buyers today expect firms to deliver truly effortless service across all conversation channels. As such, when customers prefer to address their needs themselves, they don't want to navigate complex interactive voice response (IVR) menus, struggle finding information on a company website, or explain their issue to a live agent and wait for resolution. Rather, buyers want firms to deliver smart self-service that makes it easier for them to address their needs themselves while still delivering consistent and personalized experiences across all channels.

Self-service programs have transformed drastically over the past decade. Customer knowledge of self-service and willingness to use related capabilities for self-help has increased while more firms have incorporated it within their activities to keep-up with these changing expectations. Yet, there's still a gap in what buyers expect from self-service and what businesses deliver. That is, customers want effortless experiences through self-service channels of their preferences and business provide them with capabilities designed to primarily deflect conversations to reduce traffic and cost. Firms still operating with this traditional self-service delivery model are falling behind.

There is a new breed of self-service savvy contact centers that use these capabilities to create happy customers, boost agent utilization, and improve issue resolution – all the while reducing costs and growing revenue. Those firms are smart self-ser-



vice users that transformed their activities from traditional to the modern ways of doing business by using analytics and AI to optimize their current activities while leveraging automation to expand and improve the use of self-service.

If your firm hasn't yet made the transition from traditional self-service to smart self-service, we highly recommend considering doing so as this will help align your performance with that of the leading contact centers. This will also make it easier to keep-up with rapidly changing customer needs – a necessity for building and managing a thriving modern contact center across all industries. To see the full Aberdeen white paper on the ROI of smart self-service, download the white paper [here](#).

Meanwhile, you may be wondering whether promoting self-service risks weakening your ties with your customers. In fact, just the opposite can be true. The next article in this e-book will help you understand how self-service and knowledge management can actually increase customer engagement.



How Can I Increase Customer Engagement with Self-Service and Knowledge Management?

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Self-service is the front door to most customer journeys, with whatever channels customers choose. The best self-service flexibly engages with customers, adapting to their responses and choices in real time. And it is much more than a tactic to deflect calls away from live agents.

Intelligent self-service systems are knowledge engines that place just-right information into the hands of both agents and customers at just the right time. Contact centers that adopt the modern tools for self-service, like AI chatbots or customer portals, enjoy delighted and loyal customers. [In a recent webinar](#), Aaron Rice, General Manager, CXone Expert at NICE, was joined by Keith Dawson, Vice President & Research Director at Ventana Research to discuss how companies can spruce up their self-service front door and put out the welcome mat for smart, seamless customer journeys.

One of the most important steps is to make sure that your knowledge management system is tuned to provide truly helpful self-service. **“Knowledge decay is the death of any self-service offering,”** Aaron notes in the webinar. It’s really a case of less is more. If you can find that 20% of knowledge or less that’s going to do 80% or 90% of your self-service work, and if you keep that fresh and lean, you’re going to see a lot of return.”

So how do you get started on increasing engagement with self-service and knowledge management? Keith Dawson recommends these steps:

- Build a maturity model that allows you to project forward to a realistic future state
- Look to vendors for educational guidance that establishes a

pathway from IVR to chatbots to AI/Natural Language Processing (NLP) and beyond.

- Balance the cost-savings rationale (contact center deflection) with back office and employee use cases and benefits
- Start by integrating knowledge management into all customer-facing applications (portal, chatbot, community)
- Look for revenue-generation capabilities of knowledge management and self-service, including improved customer loyalty and CX

The next article in this e-book takes you a level deeper, for an in-depth examination of the technologies and trends driving intelligent self-service.





CX in the Era of Intelligent Self-Service

Opus Research

The days of rigid and intellectually stunted intelligent assistants are over. Too many alleged AI solutions were built and deployed from a defensive position, not in service of the customer. Deflection was the metric du jour; customer experience and, more importantly, customer control were afterthoughts.

At every turn in their conversations with customers, successful CX leaders must ask themselves, “How can we be of service at this moment?”, meaning that technologies are applied in real time to determine:

- Where can we allow customers to easily and successfully self-serve?
- Which meaningful automation strategies deflect conversations from agents?
- What sensitive topics or questions require human intervention and empathy?
- Where are the opportunistic moments for your intelligent assistant or agent?
- How will conversational AI solutions empower and support agents?

Conversational Intelligence and self-service enable companies to be more proactive as they shift from a defensive posture to playing offense. Thoughtfully applied Conversational Intelligence and self-service options have arrived to answer all these

questions. This white paper from Opus Research (available for download [here](#)) helps you understand the elements of modern intelligent self-service, including:

- The Power of Search
- Conversational Intelligence in Service of Real-Time Action
- A New Era for KPIs and Customer Trust

It’s a generational change, and today’s cloud-based platforms are up to the task. A Conversational Cloud, like NICE’s CXone, provides a platform for Customer Experience Interactions (CXi) that incorporates Conversational AI, Knowledge, AI-infused tools, real-time analytics, and even proactive outbound messaging in ways that accelerate each customer’s path to task completion. From search to checkout and ongoing support, it fosters a conversation that culminates in successful resolution of the issues raised by both customers and employees. This presents options, features and functions that are comfortable for cohorts—ranging from Baby Boomers who use their voice to “get to an agent” to GenZ “gamers” who treat a conversational interface like the fastest game controllers.

As noted above, Proactive Engagement is another key benefit of the move to more intelligent DX systems. The next article in this e-book introduces you to 6 ways to meet customers proactively on their journey.



6 Ways to Meet Customers Proactively on their Digital Journey to Increase Customer Lifetime Value

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There are several things you need customers to do. Stumbling about searching for ways to get answers to their service questions isn't one of them. Yet that seems to be happening far too often these days because customer paths to quick resolutions aren't clear or convenient.

Customer service is like a great teacher or involved coach. They proactively provide vital need-to-know information or enable others to easily find it themselves. So be a valuable and supportive CX teacher and coach. Guide your customers from the very beginning of their journey – no matter where it starts.



With the right proactive strategy and tools, you can identify and direct every customer's digital quest to the optimal outcome. Here are six ways that being proactive can help save your customers time and effort while building a lasting loyalty to your brand.

1. Know what your customers expect – and provide it
2. Prioritize your customers' needs
3. Anticipate customers' wants and issues
4. Don't make customers play guessing games
5. Help customers help themselves
6. Proactively engage with customers who won't contact you

Being proactive means anticipating and staying ahead of your customers' needs. With the right tools and right strategy, you can remove friction along the digital customer journey and resolve customers' issues the first time around faster and easier.

This will provide several key benefits to your customers and company: Improved first-contact resolution, greater self-service resolution, reduced call volumes, lower operational costs, and minimal customer effort.

Read the complete blog post, [“6 Ways to Meet Customers Proactively on their Digital Journey to Increase Customer Lifetime Value”](#).

The next and final article in this e-book offers a look at where the cutting edge in intelligent DX—generative AI—is already shaping approaches to CX, and where companies like NICE envision this exciting technology heading in the future.



Why GPT, Why Now, and What's Next?

AI technology is currently the focus of much discussion and debate across virtually every industry. In a recent [LinkedIn Live conversation](#), John Willcutts, General Manager, NICE Digital Solutions, and Elizabeth Tobey, Head of Marketing, Digital Solutions, dug into the impact that AI is having on the customer experience landscape, why AI needs more than good language modeling to be relevant, and what's on the horizon.

“At the highest level, it's going to fundamentally change how our customers view interacting with what's called a bot—an intelligent virtual agent,” John explains in the conversation. “It'll give you fundamentally different, well-formed answers to questions.”

But John advises brands to proceed with caution. “Unfiltered, today, it can give you some answers that you're not going to want

in customer service. And so we've spent a lot of time looking at how we establish guard rails to make sure the technology is responsive to your brand language and your brand constitution.”

But with these guard rails in place, enterprises have the potential for huge wins. “The exciting part that's coming is the ability to take it beyond the product level and take it all the way to the platform level, to use it to access data and deliver amazing experiences for our customers and our users.”

“When we begin to pull this onto the platform level, which we're actively beginning to do today, we're taking all the labeled data from all the data sources that we have—and you can imagine it's billions and billions of records per month and lots and lots of customers, and almost a million agents—you're looking at huge sets of data that we're using to retrain [the AI] for these use cases.”

