



KMS Lighthouse

KMS Lighthouse Presents

SPOTLIGHT ON CX LEADERS REPORT



We are delighted to share our 2020 Spotlight on CX Leaders Report. We gathered a list of top leaders in customer experience from a variety of industries and interviewed them on attributes of successful customer experience and knowledge management today.

Now more than ever, customer experience is essential. The COVID-19 pandemic crisis has put call centers front and center in helping customers get the most current and accurate information they need. It's also revealed just how valuable a well-run call center is in making sure customers feel informed and valued. Today we're starting to see early indications of a return to normal business patterns, but there are vital lessons to be learned from the pandemic on how to improve the customer experience in call centers moving forward.

Customer experience covers a customer's entire journey with a brand, from first discovering a product or service to following up with the company after making a purchase. Unlike customer service, CX is focused on how the customer feels at all times during their interaction with a brand. Knowledge management is essential to an improved customer experience providing agents and customers with the right answers in the right time. Happy employees lead to happy customers.





Insurance

Joanna Deffner
IT Enablement Supervisor



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Bio

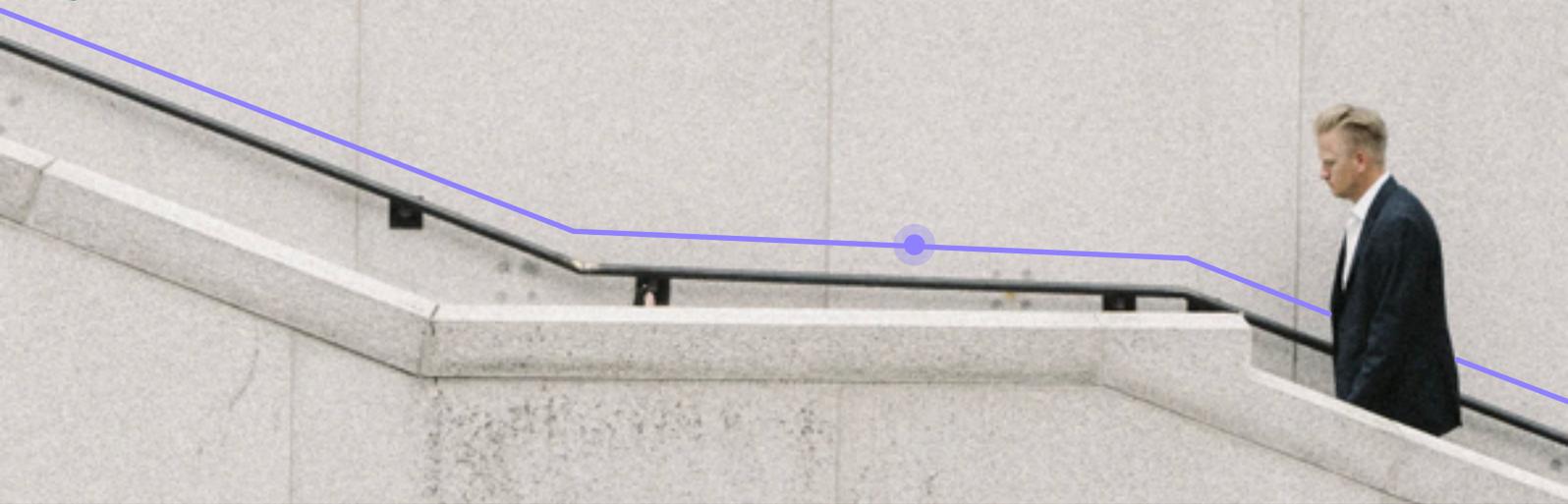
Joanna Deffner is an IT Enablement Supervisor at COUNTRY Financial partnering across the enterprise to deliver engineering capabilities that enable DevOps, continuous integration/continuous development, as well as Information Technology Knowledge and Service Management practices. After spending over a decade in IT and KM, Joanna believes KM and CX are the key drivers of an organization's success. Joanna has implemented KM solutions with various financial and higher education institutions over her career, supported CX applications, and championed nation-wide KM user groups.

1 What are the most important attributes of successful CX today?

The most important attributes of successful CX really depends on what's been identified as the greatest gaps within an organization. Ideally, once the largest areas of improvement (the chief ROI factors) are acknowledged and addressed, that's your most important success. However, for the sake of identifying a few, examining the full customer journey is paramount. Customers have experiences with an organization in- and outside of digital channels, and many aren't inherently measured. The more data points we can gather about our customers, the better we can understand their journey and desired experiences with our organization. Getting to "big picture" helps to optimize the customer experience.

This ties in closely with a secondary aspect of CX: measurement. This goes beyond gathering data points but speaks to the need of setting key performance indicators (KPIs), analyzing data, and aligning with those KPIs.

Measurement is not tracking hits on a page, clicks on a self-service knowledge article, or number of escalations. Furthermore, it isn't just plotting data points on a graph. Impactful CX measurement is taking time to ascertain what data is telling you and what you do with it. Data can't just be called data, and CX can't just be called CX. It doesn't truly become meaningful CX unless you measure, map, and act on it, and then iterate on/optimize those changes. That's a true success factor.



2 Why is knowledge management essential to you and your organization? What is the role knowledge management plays in your organization?

Knowledge Management—and getting the right information, to the right person, at the right time—is essential to our organization to best support our customers in- and outside the enterprise. KM provides a way to deliver consistent and correct information to our clients, ensures procedural and tribal knowledge is captured for business continuity, and reduces waste.

KM is utilized in training new hires and has greatly reduced time to proficiency across various departments and our agency field representatives. It serves as the source of truth for procedural documentation, troubleshooting IT issues, as well as ensuring successful IT deployments. Knowledge has enabled our clients to self-serve on our Website and even transcends throughout the enterprise—enabling business partners to self-serve before engaging with constituencies, including IT, business areas, and field agents.

3 What future trends do you see in the space of CX and KM in the coming year?

I believe we'll see similar trends that we do already today. Investing in digital strategies will remain a priority for organizations. As our world continues to change, especially in the light of the recent COVID pandemic, businesses yet to adopt this acumen will acknowledge the greater need to invest in digital experience and having a strong online presence. There will be continued improvements in the omnichannel experience—not only on the Web, but on the mobile platform as well, especially as “mobile first” continues to trend.

Organizations will continue to advance in creating seamless customer transitions between self-help (via knowledge articles, Virtual Agents, and chat bots), live agent chatting, and phone escalations. Transferring data through these channels will be critical as well as anticipating customer needs based on their digital journey. In these efforts, a key focus continuing to challenge organizations will be how to balance humanity and automation in customer interactions, for a truly optimized customer experience.

**ANSWER ANY QUERY,
ANYTIME, ON ANY INTERFACE.**



Retail

Jerry Campbell

IT Enablement Supervisor
Sr. CX Manager



[7-eleven.com](https://www.7-eleven.com)



Bio

Jerry Campbell is the Head of Customer Experience (CX) and Social Engagement at 7-Eleven. In this role, he leads a team that delivers a “World Class” Customer Service and Customer Experience through an omni-channel approach. Jerry transformed 7-Eleven CX to include a social media care team designed to meet and delight customers in their current space; resulting in a positive and seamless near real-time customer experience. Before his 7-Eleven experience, as a senior workforce manager for CitiBank, Jerry coordinated with external business partners to institute a Customer Listening and Engagement strategy providing optimal social media engagement solutions incorporated into call center operations.

1

What are the most important attributes of successful CX today?

The most important attribute of a successful CX program is to be able to deliver an effortless customer journey. That means whenever a customer comes across a particular pain point in the journey the CX team can deliver accurate consistent messaging across all channels. The messaging has to be helpful and not confusing. The customer should be able to go through self-servicing channels and receive the exact same answer they would get from a live agent.



2 Why is knowledge management essential to you and your organization? / OR What is the role knowledge management plays in your organization?

Knowledge management is the heart of everything we do in the CX realm. It provides consistent messaging from every channel. Agents have access to answers from a system that will deliver the best customer experience. The KMS will also power AI chatbots and self-servicing channels as well. It helps us deliver an effortless experience and increase loyalty for our customer base.

3 What future trends do you see for the space of CX and KM in the coming year?

I see KM used in every channel for CX. When companies start opening SMS text and bot channel technologies there is a need for a supply source to power these types of initiatives. KM will be essential in the machine learning aspects as well. KM can power and deliver the message in the preferred format in which the customer would like to receive it. Whether it is text or self-service, the customer may want a step-by-step guide or video vs. text alone. KM is the platform that can help build out future CX performance.

**ILLUMINATE THE PATH WITH
KNOWLEDGE MANAGEMENT**



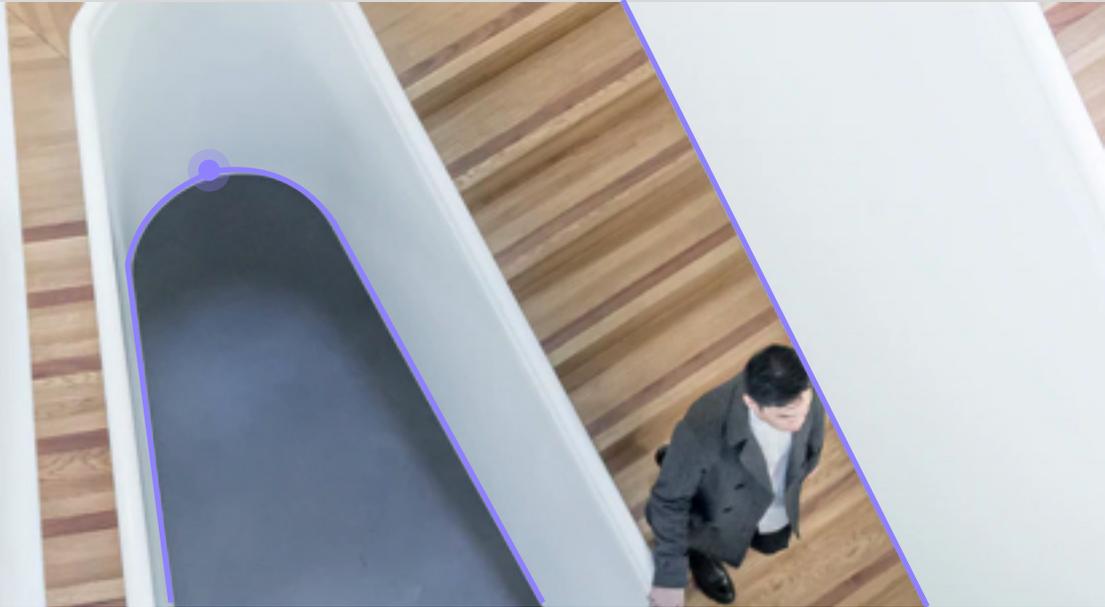
Finance

Shirley Quinn

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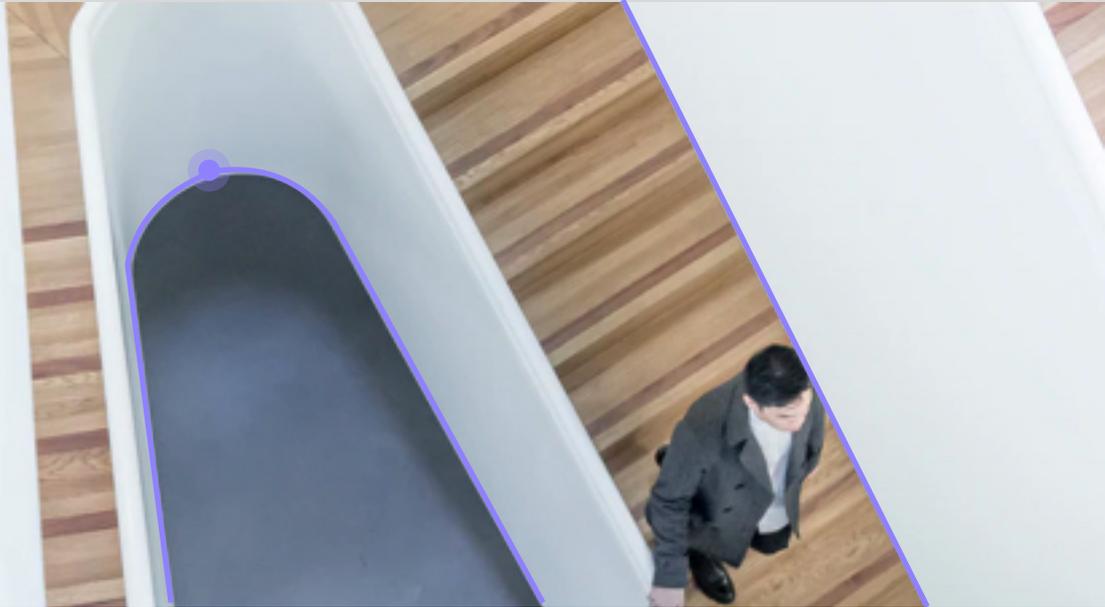


Bio

Currently, Shirley is the director of the retail and wealth contact centre with Coast Capital Savings Federal Credit Union. Shirley has more than 20 years of comprehensive people and operational leadership with employers such as Coast Capital Savings, Aeroplan, BCAA and 1-800-GOT-JUNK? where she has led hundreds of employees, operational budgets up to \$43M and gross revenues up to \$330M. She is widely acknowledged as an impactful mentor with demonstrated success developing high performing teams and transforming business processes in pursuit of a customer-obsessed culture within an omni-channel environment.

1 What are the most important attributes of successful CX today?

- Availability and accessibility of end to end fulfillment across all customer communication channels, including self-service
- Use of self-service for simple interactions and re-direction of complex interactions in-person or voice channels where appropriate, with a greater focus on the latter in light of COVID-19. However, inclusion of automated decision making to qualify these interactions may be warranted.
- Consistent yet personalized experience. With voice or in-person interactions, ensuring the experience is supported by a knowledgeable, well-trained expert. With online or self-service experiences, using analytics to personalize the experience (without going overboard).
- Balance between effectiveness of the interaction and efficiency with a shift from in-person to over the phone or online interactions
- Solutions based approach using data and speech analytics
- For self-service, user design is as important as usability



2 Why is knowledge management essential to you and your organization? / OR What is the role knowledge management plays in your organization?

Improve employee satisfaction

1. Empower customer-facing employees
2. Onboard new employees faster
3. Meet employee demand to have more information available in real-time
4. Allow employees to self-manage

- Improve customer satisfaction with first touch resolution
- Improve consistency in delivery across all channels
- Drive information to self-service customer options such as chat bots

3 What future trends do you see for the space of CX and KM in the coming year?

Even stronger emphasis on automation to not only improve the cost per interaction but to allow for more real-time service 24/7 (ie I want to complete an interaction or seek advice when I am available, not when you/the company is available)

1. AI becoming more mainstream not only to improve our operating costs but also to help power a knowledge base in near real-time
 2. Increase percentage of interactions being offered through self-service, such as chat bots and completion of online transactions
 3. Voice or face authentication over PIN or password verification processes
 4. Considerations include the technical literacy of the consumer and the need for the consumer to have access to technology when needed
- Even greater personalization of in-person and voice interactions with a focus on deepening customer relationships (vs transactional) to improve retention and as a differentiator vs. the competition. This includes using data in combination with interaction (speech/email/social media) analytics to anticipate customer needs and solutions in real-time and even design more powerful loyalty or retention programs (where loyalty points become currency), for example.



Healthcare

Burg Hughes

Senior Manager Call Center Operations



GE Healthcare

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Bio

Burg is currently the Senior Manager of Call Center Operations for GE Healthcare. He has over 30 years of experience leading customer service organizations across a wide range of industries, in which his teams have often been recognized for best in class service. He has spoken at multiple conferences including, the National Conference on Operations and Fulfillment, Customer Service Experience & CRM Evolution, KM World, and ICMI's Contact Center Conference and Expo.

1 What are the most important attributes of successful CX today?

More than anything else today's customer requires every interaction with a contact center to be efficient and accurate. For example, a recent survey of millennials noted that 34% would rather go to the dentist than call customer service. Another survey of online shoppers reported that 71% of respondents indicated the most important thing a company can do is value their time. I think we need to listen to our customers, who are telling everyone in the service industry that what they need from us is accurate information to facilitate their journey provided as expeditiously as possible. I realize this runs counter to much of the effort that has happened in contact centers to drive engagement with customers. The reality is our customers are not calling us to bond or make a friend, they are calling us because of an immediate need. They seek a resolution and they want it as quickly as possible. They could care less whether we use their name 3 times on a call.

This certainly does not mean that we shouldn't be professional and friendly. Those things will always be table stakes in service, but it does mean soft skills are less critical to customer experience than efficiency and accuracy. I have been a fan of the book *The Effortless Experience* since it was published because it uses a tremendous amount of research to guide customer experience leaders to the right answers about what our customers want. My key takeaway from their findings is there is very little difference between what we might consider an ideal interaction with a customer and an average one, but our customers leave us when we create a "high effort" experience. The book provides many examples of a "high effort" experience, but all of these really boil down to time. Time is precious to every customer and we need to find paths via self-service and human interaction that value our customer's time.



2 Why is knowledge management essential to you and your organization? / OR What is the role knowledge management plays in your organization?

We work in a highly complex and regulated environment, supporting multiple lines of mission critical medical equipment for hospitals, which all have their own unique needs. Our callers include medical technicians, nurses and physicians and they need us to support them as quickly and efficiently as possible so that they can get back to taking care of their patients. These can be life and death situations where both efficiency and accuracy are critical.

KMS Lighthouse has been critical for us because it allows every member of our team to find the right answer immediately. It has allowed us to organize complicated information into easy to use workflows and decision trees that guide team members to the one right answer in every situation. Having the right knowledge management system in place eliminates errors and increases efficiency resulting in improved customer experience.

3 What future trends do you see for the space of CX and KM in the coming year?

Covid-19 is accelerating change across the globe. Trends that have been moving rapidly, such as remote work and online shopping have gained further momentum in response to the pandemic. These are changes that will not be undone when the world eventually returns to normal. Companies need to get used to distributed workforces. We also have to expect that consumers, who have replaced restaurants and grocery stores with online ordering; who have replaced movie theaters with streaming will not readily return to their old habits.

What this means for those of us concerned with the customer experience is the distributed delivery of service to customers through local retail, restaurant, and theater establishments will be replaced with a more uniform customer experience delivered through online platforms. Instead of asking their local grocer a question, consumers are going to be using self help tools and contact centers to get their answers. This centralized support is going to be delivered by a distributed workforce.

These trends make the need for effective knowledge management more critical than ever. This is likely to result in many companies reexamining their current knowledge tools and modernizing to state of the art KMS platforms. However, we are likely to start asking more of those KMS platforms as we try to make a distributed workforce feel more connected to one another. Therefore, platforms that can help us build a sense of community while serving up accurate information will be important to keeping our employees connected.



Insurance

Aidan Dale

Associate Director –
Transformation, Planning and
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Bio

Aidan Dale joined BGL in 1995, starting a career in BGL's contact centers, in a customer facing role, where he gained a real understanding of the issues our customers face and how to ensure we deliver outstanding service.

Aidan considers the business impact of every action, building strong working relationships with BGL's partners and stakeholders.

1 What are the most important attributes of successful CX today?

We believe it's down to the quality of our customer interactions. It's about building long-term relationships with customers and giving them the opportunity to interact with you via the most effective method to resolve issues immediately, or even before they arise. Of course none of this is possible without colleagues who are empowered, knowledgeable and focused on emotional rather than transactional interaction, supported by good decision-making skills.

2 Why is knowledge management essential to you and your organization? / OR What is the role knowledge management plays in your organization?

The requirement for effective knowledge management reflects changing customer expectations and the risk that reduced switching presents to organizations. Customers expect customer service representatives to answer queries thoroughly and quickly, providing personalized information that adds value to them. In a world where reps handle increasingly complex queries, where customer self-service is not suitable, or where an organization requires the rep to add value through the interaction, easy access to the right knowledge is paramount.

3 What future trends do you see for the space of CX and KM in the coming year?

Customer expectations to be treated as an individual and have complex problems resolved immediately, will continue to increase. Customers will expect to be able to access the same information as held by reps and those whose expectations are not met, will ultimately shop elsewhere.



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Conclusion

CX is all about delivering the right answers at the right time. Whether your CX program is big or small, measuring the success of your CX strategy is non-negotiable. Good knowledge management solutions deliver the data you need to understand which CX strategies are working and which ones could do with some improvement. It's the surest way to improve loyalty and satisfaction in employees and customers alike.

KMS Lighthouse knowledge platform provides customers and agents with real-time access to accurate and consistent knowledge to improve customer and employee experience alike. Lighthouse's powerful AI-enabled search functionality dramatically improves engagements across all service channels, including easy integration to enhance existing and future self-service channels like chat-bots, IVRs, and more.

To learn more about KMS Lighthouse

[Request a Demo](#)

