



BRIGHT PATTERN + **CCW** CUSTOMER CONTACT WEEK

The Future of CX - What's Next?

Report Summary from CCW Vegas, June 2022 Workshop
From a Bright Pattern customer panel, presentation of ideas, and audience interaction



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Meet the Speakers



Ted Hunting

SVP Marketing
Bright PatternCenter

Ted Hunting leads marketing at Bright Pattern, an innovative cloud contact center company. Ted is a member of the CCW Europe Advisory Board and former member of the CCW North America Advisory Board.



Othmar Mueller Von Blumencron

Senior Vice President of
Sales & Marketing,
VIPDesk

Othmar Von Blumencron is the Chief Revenue Officer at VIPdesk, an innovative BPO that elevates CX for iconic brands in all industries with a focus on treating each employee as a valued brand ambassador for their clients.



Jessica Osborn

IT Support Services
Operations Manager,
Worlds Largest HR Services Firm

Jessica Osborn is an innovative change agent at the world's largest HR services firm with a focus on transforming CX for their IT Service Management Operations over voice and digital channels.

Ready to Learn About What's Next?

The largest customer contact event series globally kicked off in Vegas and on the first day of the conference, Bright Pattern led a 90 minute CCW workshop on the future of CX. The workshop included the sharing of industry stats and research, had commentary from a customer panel, and illustrated some of the concepts discussed with short demos of innovative CX in action. The workshop was attended by nearly 200 CCW attendees.

The discussions were led by Ted Hunting (Bright Pattern SVP of Marketing and CCW Europe Advisory Board Member) and was accompanied by an esteemed panel that included Jessica Osborn, who leads innovation CX at the world's largest HR services firm, and Othmar Von Blumencron, SVP Sales and Marketing from VIPdesk, an innovative BPO that provides CX services to many leading luxury brands across all industries with thousands of fully remote agents.



Workshop at a Glance

The main topic of the workshop and the main purpose is to share ideas to collectively understand what's next in the future of CX. Putting together the minds of the speaker, panelists, and audience will help us get closer to figuring out how to adapt to the future of CX. During the workshop, ideas were shared from both the customer panelists, Jessica and Othmar, as well as audience members who shared their insight into what they think the future of CX will look like. Included with these ideas are short, innovative demos of the technology and ideas in action.

The goal of the workshop is for every audience member to leave with one really good, maybe even great, idea for how to adapt to the future of CX now and maybe another great idea for the foreseeable future.



The panelists then commented, starting with Othmar:

Othmar noted that although chat was the most popular digital channel, its use increased even more during the pandemic. He mentioned that with live agent issues during the pandemic, chat became a channel where both consumers and companies providing support could win, because agents could handle multiple chats and a short wait was acceptable. Also, chat conversations could be more fluid versus a call that just “ends”. The shift to asynchronous messaging with persistent conversations happened over time. Othmar also noted that although messengers are a preferred channel for Generation Z, their luxury retail customers proceeded to adopt and show a preference for messengers at a level that was almost similar for their older clientele. This is true on different messaging platforms such as Apple Business Chat, Facebook Messenger, etc.

After Othmar’s insights, Ted commented: Othmar’s point about a continuous conversation can lower friction and effort, and allow people to “find time” as they can start a conversation on a messenger, head out on an errand, and then come back to the conversation later when they are free to continue the conversation.

Jessica added: We like to give the most touchpoints we can to customers - not just as a call center, but also as a strategy to provide customers with as many ways to get an answer as possible. Jessica noted that messengers and SMS are important new channels to support, but call centers need to make sure they are true omnichannel and not new silos. Companies need to offer both traditional channels like calls as well as SMS and messengers. Meeting your customers where they are, which is often on mobile devices as noted by McKinsey, is important as people are getting more used to messengers..

Othmar then added: We all want to use the same channels that we use to communicate in our everyday lives and with our families, so why not use these preferred channels in business too. We have family SMS and messenger conversations so we should be able to use our favorite channels in a business setting too. Fast, easy, and friendly channels of communication.



We then asked the audience to chime in

with a few thoughts from their end. Here were a few comments from our roving microphone.

Audience member #1: We are a financial institution in Mexico, and we used to use SMS for reminders only. Our chat channel in our geography was not very popular. But in the last 6 months, we started using messengers and it just took off. Now we find that 30% of our interactions are not through voice, but now through messengers.

Another audience member commented: We can use messengers to offer customers a seamless conversation. This conversation can keep going. If a customer has a question a month from now, they can reach out again. And as a business, this means we are always in touch with our customers.

Ted commented on a major US broker who does it well as an example of what is possible. Users can be routed directly to their “team” using skills-based routing for a very personal experience, and they even allow you to transfer money within the chat once the user is authenticated.

Ted commented that we can not only learn from each other, but also from what other regions are doing. Latin America is leaping ahead to these new channels at a faster pace than other geographies.

Another member commented that all chat is not equal and how you do it is as important as the channel itself. She mentioned dumb bots being problematic as an example. Or an agent with too many chat sessions at the same time, which is equally as bad for CX.

Self-Service and Always-On CX

The next topic was self-service. First, we started by sharing some recent stats.

Ted commented: It is interesting to see the latest COPC stat, which now shows a renewed emphasis on cost savings as revenue growth has been a top topic in recent years, perhaps due to inflation concerns. This speaks to the need for lower costs on self-service options.

Customers want self-service, but it must be low-effort, fast, and easy. Traditional IVRs were mentioned. The audience was asked about how many people love their IVRs, and less than five hands went up! Traditional IVRs force the customer to go down rigid trees that take time to get to your option. This contrasts with conversational IVRs, where you can speak freely.

We also discussed that dumb bots are bad self-service. The current best practice recommended by both CapGemini and Gartner is for narrowly defined bots that each perform a particular function, but can be orchestrated or used together so the user does not realize they are being routed to a particular bot (v.s. one bot that does it all and does nothing well). This would be similar to skills-based routing with the right bot for the right inquiry.

We also discussed United Airlines as example where in the airport, you can scan a QR code to reschedule a flight, talk or video chat with someone in a virtual call center as opposed to waiting in a long line at the airport, or check on a bag as great self-service examples that also take advantage of the mobile trend.

We then shared a video of a high effort old IVR [\(link here\)](#) v.s. a much easier “speak freely” conversational IVR [\(link here\)](#).

Self-Service

- Greater efficiency is more important now with inflation
- ‘Performance Data’ and ‘Cost Related Data’ emerged as the top themes in 2022 (COPC study) - a shift from revenue focus last few years
- 95% of Customers prefer self-service but want it low-effort, fast (convenience and speed)
- Love Self-Service IVRs? Traditional IVRs are considered “Bad IVRs” with high friction and rigid long phone trees
- Conversational IVRs are considered “Good IVRs” where customers can speak freely for fast and easy resolution
- Self-service where you are on mobile devices (eg. SMS, Messengers)

Jessica commented: Self-service will become more and more of the future. And a good test is to see how you like your own company’s self service, because if you don’t like it then your customers will like it even less. If it doesn’t meet your quality test, then scrap it and start over.

Jessica also mentioned that you should continually look to what you can do better, such as minimize button pushes or transfers, because reducing effort in everything you present to customers is key. Think of all the steps and make little improvements to always make it easier. And once you have initial self-service use cases operational and easy for customers, make it a habit to add new ones over time. The goal is to continually improve based on what customers want to do with your guide.

Othmar commented:

Self-service is fundamental, and the most important thing you can offer for every single brand. And due to inflation and the need to minimize costs, self-service is even more important in today's world. Othmar also noted that at a recent conference, only 2 people raised their hands and said they had a great bot. Based on this, Othmar added that people shouldn't deploy a bot or AI just to have it, but need to make sure it has the desired impact on improving CX.

Othmar noted that as a BPO to many high end brands, it is important that they eliminate unnecessary conversations. Companies need to focus on better, easier CX interactions, and companies should consider generational differences too. For instance, he noted that his son would never pick up the phone to call but would browse for self-help. The biggest and best brands like Amazon showed us initially what is possible with simple, easy self-help. Othmar noted "the best customer service is when you don't need customer service by making it easy for your customers". Make customer service invisible with great self-service options.

Jessica added: It's less about budget much of the time too, however costs are still important. In her business, she noted that it is more about the customer experience and making it easy and efficient.

Ted added: The easy example we all see of effective self-service is when we flew out to Vegas. Airline companies now let you change seats in their mobile app v.s. making you call and wait. Easy and simple. Almost like a visual IVR in many respects, which is also another self-service option companies should consider. A visual IVR lets you send a link and an easy-to-navigate mobile app opens for selecting options.

Jessica and Othmar both noted that it is important to look at your interactions and customer journeys and focus on certain use cases that see the most traffic. Then look from there as your first area to automate with easy, low-effort self-service. Then keep building on it over time as part of a continual improvement process.

"The best customer service is when you don't need customer service by making it easy for your customers. Make customer service invisible with great self-service options."



What's Next with Remote Employees and Working from Home

Ted introduced Othmar to lead the discussion on this topic as his company has been a pioneer in remote work from home for many years, offering exceptional service to luxury and high-end brands using a 100% remote workforce.

Othmar took the stand and lead the discussion:

We have been doing remote for 20 years now, believe it or not!

I like to think of Remote 1.0 being when we realized it was possible - especially during emergencies and disasters. Remote 2.0 was when we understood that we can hire great people and onboard them around the world, and do it with even higher quality than an "in-office model". Remote 3.0 refers to the workforce post-COVID and the new standard. We now all need it as part of our CX armor.

Othmar noted that a recent survey showed that the quality of the work environment is better than on-premise for 90% of companies surveyed, and it is now here to stay versus being a temporary approach. Now with cloud-based technology like Bright Pattern, we can enable it easily with work-from-home capabilities. He noted that he found it beautiful that he can attract and retain great, exceptional talent from anywhere in the world. He can look for a specific person with a special skill set anywhere in the world, and they don't need to be in a 20 mile radius of a physical location. These exceptional talents can be anywhere, even 3000 miles away. With this model, Othmar is able to recruit better people, similar to software being based on the cloud and as a service model.

Othmar also noted that with remote, it is essential that you give your remote employees the tools and information they need to be successful. Learning, productivity, and information at their fingertips in a single desktop. He added that you need to make sure the software platform has all needed capabilities,

like the PCI compliance within Bright Pattern to handle payments and so on so that remote workers handle data securely.

From a workplace culture perspective, Othmar noted that being flexible with things like work-from-home Fridays can help retain people. Othmar and other supervisors talk with team members all the time as retention is critical to their business. His operations also need to be more efficient to compensate on the right levels for certain talent. At the end of the day, it's all about creating a great culture. Othmar closed his section by saying, "We have focused for 20 years on creating a great company culture at the watercooler, but doing it remotely. Talking with team members all the time helps with retention too. For many call centers, keeping retention under control is important, so for our executive team, culture has always been a top priority."

Jessica added: It is very important to keep remote staff fully engaged as we can't walk around and see how they are feeling. We need to be extra invested in them and spend extra time reaching out to remote workers if we expect them to be invested in the company.

Audience comments: A Member of the Covered California State Agency commented: They have 800 employees and now 99% of employees work from home permanently. They noted that the right tech is key to being able to do it. They have a concept called "presence equity" where everyone is coached to make people feel they are in the room even if they are virtual - effectively going out of their way to make people feel part of the conversation. They also have days where they encourage people to wear their favorite sports jersey to online meetings and employees love it! Leadership also coaches people who are shy and people who are talkative to either step up or step back in meetings. They also put people through Myers-Briggs type training to improve communication among teammates.

Another audience member commented that they have an annual strategy plan day with agents involved - typically about 30-40% of staff. They did it in a hybrid fashion this year for the first time and made a strong effort to get



everyone engaged in a big room along with the virtual people. One of their learnings was that they had more engagement online because of chats and gifs as the online members communicated. From this, they realized that they needed to equip people in the room to also be on Teams during live meetings.

Ted asked how many people are using Teams or planning to along with their contact center software and about 80% of the hands went up. He noted recent research from Forrester that predicts UC and CaaS are starting to come together, with an example being adding a subject matter expert to a web chat or a contact center call.

Remote 3.0 - Post Pandemic

- Mercer: 90% of companies say productivity is same or better
- Utilizing cloud based/omnichannel contact center platform - matching customer communication preferences
- Attracting and retaining best talent wherever and whenever
- Equip agents with the tools they need to be successful and empower them to make decisions
- Explore flexible, hybrid structures allowing team-members to work shifts on-site or at home
- Security: PCI / HIPPA certification for remote structure
- Utilizing cost efficiencies to compensate team-members at attractive levels
- Creating a strong remote culture with the help of digital engagement tools
- Empathy at core

What's Next? Omnichannel Quality Management

Ted started off this section by sharing these slides and information from a recent Bright Pattern survey on omnichannel quality management.

Improving CX is a Top 3 priority of most companies (Gartner)

But you can't improve what you can't measure of most companies (Gartner)

and most companies measurements involve sampling a few drops in the ocean of most companies (Gartner)

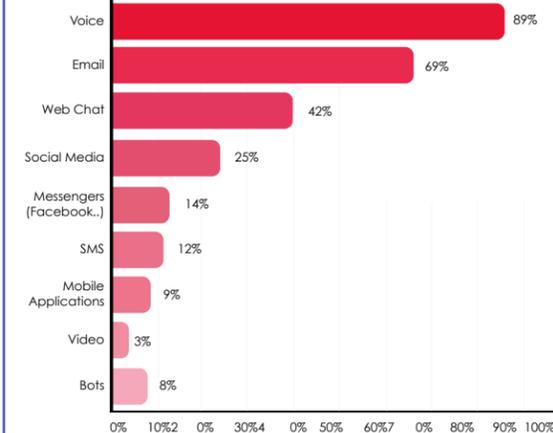
Quality Management Stuck in the Voice World

Most interactions are not measured - sampling is pervasive

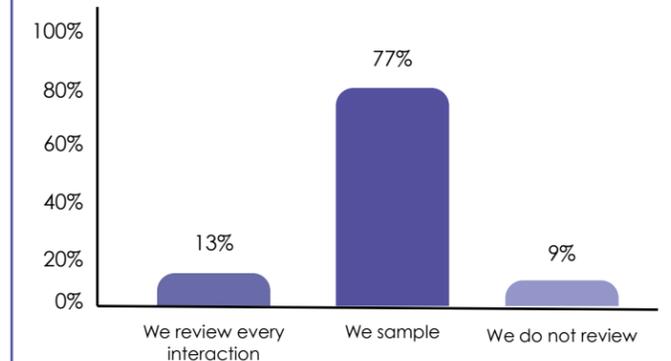
Most digital and emerging channels are not measured

Most measurements are "not in the moment" - too late to act

Which Channels do you measure Quality?



How do you review your contact center interactions for quality assurance?



Ted commented: Most companies are not even measuring the quality of most digital channels, and when they do measure, it is very limited sampling. But with AI, we can measure every interaction on every channel with platforms like Bright Pattern. He also noted that quality needs to be measured often in real-time before it is too late to act. As the Gartner CEO says, there needs to be action "in the moment", as the companies that will win and be the new disruptors are companies that can act in the moment. Ted noted that this is also shown in surveys and research for CCW and IQPC.

Ted then shared a brief demo of omnichannel quality management in action to show what is possible ([link here](#)).

The video showed how you can search for any agent that is managed, and then show all interactions on any channel sorted by sentiment or CSAT for each interaction - including remote agents. This allows you to drill down and review voice or screen recording of lower quality interactions. This helps with training and coaching immediately. It also allows you to better understand the quality of remote agents - per the last topic.

Jessica commented: She has many different call centers so she measures quality by each center or by each channel in each center. Her quality measurements are often different depending on the team, and the quality metrics that are needed for the particular contact center team can differ.

Othmar added: People expect a plug-and-play solution but few exist. It is important to have some automation as most companies don't have or can't afford an army of quality scientists. But grading calls alone is not enough given the shift to digital channels, and we need to strive to grade all channels and ideally 100% of interactions.

Jessica added: And it is not only grading agents, but the need for it to be a two-way conversation where agents can review an assessment and say I agree or don't agree, and make it more interactive than a simple piece of paper. Having a system like Bright Pattern Omni QM is great because it measures all interactions and then lets the supervisor and agent score and coach. This can then lead to a discussion about the assessments as the whole team is in on this together.

Audience comments:

A member of the audience added: We need to have the same approach with agents. We need to meet agents where they are and make them part of it. So there is no "big brother" watching them, but someone there to help them get better and listen to the agents to make the process better. Explain that we are there to help them and that they are being listened to. Let agents also talk about what they need to improve so it is a two-way dialogue.

Othmar added: When retraining agents, make sure to let the agent know that the info is for coaching and that we all get better together. It is not only about the "bad examples", but also about the moments when someone does a 5-star job. We can also share these examples with other agents so that these great examples can be used for sharing, learning, and improving the entire team and organization.

Ted made a final comment that some people may not buy into AI sentiment grading. There can be errors so it is important that supervisors who are using the coaching tools in an Omni QM platform, such as Bright Pattern's, also include human assessment into the quality management system. He also added that a simple low-effort survey such as a Lyft star-rating customer survey can be used with customers too. This approach allows both a passive measure of QM, such as sentiment, to be coupled with an active measure from the customer to have a more complete view of quality. The supervisor can then search for every interaction and see either sentiment or CSAT of all interactions with a CX platform like Bright Pattern.

"We need to have the same approach with agents. We need to meet agents where they are and make them part of it. So there is no "big brother" watching them, but someone there to help them get better and listen to the agents to make the process better."



What's Next? AI

Jessica who is working to deploy AI with Bright Pattern led this topic.

AI for what's next - Jessica's Roadmap

- All of these can be done via voice or chat
- Password Reset
- Verify Time and Pay
- Request W2s
- Request billing information
- HR policy or procedure questions
- Provide suggestions or recommendations

Jessica led the discussion on AI as she is involved in various projects that are related to AI. Some of the key projects that involved her organization and AI included onboarding over 100,000 agents a week. Onboarding this many people a week is made easier with AI from Bright Pattern, allowing her to perform these tasks more easily and more efficiently. Things like automated password resets, handling internal systems like HR and 401K, requesting W2s, answering HR policy and procedure questions, and so on have all been made more easy and efficient with effective AI integrations. Open APIs are also important. For example, on the Bright Pattern system, there are open APIs that allow Bright Pattern to import info from a system like PeopleSoft, as well as features that keep data secure like two-factor authentication. With the massive volumes that Jessica's team handles, it's all about doing things better, more quickly and more efficiently, and AI helps make this happen.

“It’s not about deploying AI. It’s really about providing great low-effort self-service and AI is the enabling technology to make that possible. Start with the use case and goal, then add AI”



What's Next? Mobility and "CX Everywhere"

Ted opened this discussion on what Bright Pattern feels is the next evolution in CX - CX everywhere and the move to digital channels and mobility. There is no CX "center" as CX is everywhere. And with a slimmed down omnichannel desktop that allows any employee to interact with customers on voice and digital channels, the power of mobility allows subject matter experts and in-field personnel to be available to improve CX. This also gives companies access to great productivity measurements as now the entire organization can provide productivity metrics for CX.

He noted that it's not only channel silos that impact CX, but also organizational silos. Solutions like Bright Pattern Mobile can allow any employee or expert in the company to be brought into interactions to improve CX and breakdown organization silos. He shared an example with the largest office supply chain in Australia who had significant ROI in only 2 months with their 167 stores with Bright Pattern Mobile, with the statistics shared in a slide presented on the screen.

The pandemic and remote employees taught us there is not a Contact or CX "Center"

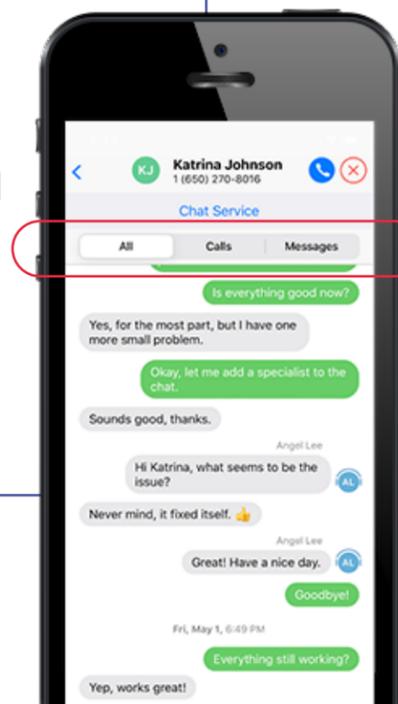
CX starts everywhere....

It's not just siloed channels that reduce CX but organizational silos

What if every employee in the company could be connected to customers on any channel

People outside the contact center...

store employees, mobile field staff, mortgage bankers, subject matter experts (oh and the contact center too)



"There is no CX 'Center' - CX is everywhere and technology like Bright Pattern Mobile can bring your entire company together to improve CX"



Office Works

- Largest Office Supply Chain in Australia
- Connect Customers with -in-store employees outside the contact center
- Store Answer Rate improved 267% in 2 months
- 90% reduction in NPS detractors
- From zero metrics on store employee productivity and reasons for calls to 100% visibility
- Customers connect directly with in-store associates for help - using Voice initially.
- Next: SMS, chat, messengers and then connect to the contact center too



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The 90 minute workshop “Future of CX - What’s Next?” was a great interactive discussion with key stats, commentary, and visionary use case demos of what’s next. For more information or to share your thoughts, please reach out to the moderator ted.hunting@brightpattern.com or share your thoughts on Twitter @ [TedMktgGuy](https://twitter.com/TedMktgGuy)

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