

# Five essential factors to help align your online and offline customer experience





Customers expect the same level of service, the same responses, and the same tone of voice whether they contact you in store, online or through social media. Consistent experiences create trust in an organisation, with each interaction contributing to your overall user experience.

The majority of organisations find it incredibly hard to deliver on this expectation. The good news is that this represents an opportunity: exceptional and effortless customer experience will give you a competitive edge in today's marketplace.

A journey between your channels needs to feel seamless. Customers don't care that your website only syncs every three hours with your complaints handling system – if they follow up a web enquiry with a call, you need to have answers.

### In the 2017 State of Global Customer Service Report by Microsoft:

- 66% of global respondents said they actively use 3 or more channels to contact businesses
- 72% of respondents expect agents to already know who they are, what they've purchased, and have insight into their previous engagements
- 56% have stopped doing business with a brand due to poor customer service experience

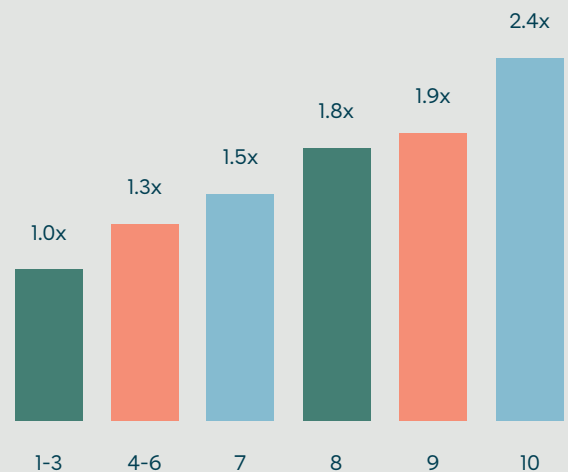
These are more than just statistics. There are real financial benefits here for those organisations who get it right, with 86% of buyers happy to pay more for a better customer experience.

Research by Medallia also shows the impact good customer experience has on sales:

### Customer experience drives sales

In a transaction-based business, sales are driven by good customer experience.

Annual revenue increase per customer



Source: Media Analysis, HBR.org

There are multiple things to consider when closing the gap between your organisation's channels and your customers, but we suggest you start with our five essential factors.

## 1 Create a common purpose

**A simple statement, but in many organisations it's the hardest thing to achieve. By creating a shared sense of purpose for the business, division, or operation that you lead - you can underline with startling clarity why people should be getting out of bed and coming to work.**

Your common purpose describes your organisation's relationship with its market. An outcome focused statement, rather than a methodology. If you can focus this around the customer, then you will be setting the right cultural tone for the changes you need to make - ensuring the customer is always front of mind for your team.

When a business or operation has defined its purpose, it can be used to inform and influence decision across all aspects of the business - including the size and scope of

teams, categorisation of projections and KPIs used to measure success.

If adoption of the new purpose is successful across your teams, then over time it will align your organisation's approach to customer service. In turn, this will drive a consistency of approach and prioritisation which will reduce the shift in customer experience across your channels.

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**Gobeyond Partners recently redesigned the operating model for the credit operations team of a well-known high street bank. As part of this work we supported the development of a new purpose to guide the principles and values of the desired future state.**

At a top-line level the purpose was defined as

**"Enabling a better future for customers in financial difficulty",**

whilst at a team level this meant challenging traditional views and terminology; for example 'secured collections', became 'mortgages - customer support'.

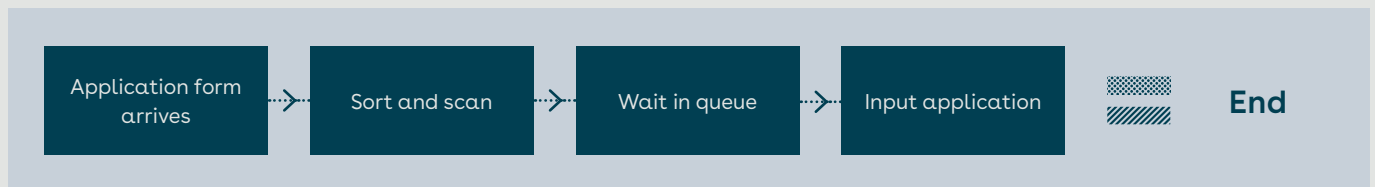
This new way of thinking helped define the culture which supported the structural and operational changes, helping to embed new ways of working which put the needs of the customer front and centre.

## 2 Design from the outside-in

**This is a bold statement which can require dramatic organisational change. Walking the customer journey from intent to after-sales is usually enlightening - and will often demonstrate how uninformed the organisation's vision is on the customer's true experience.**

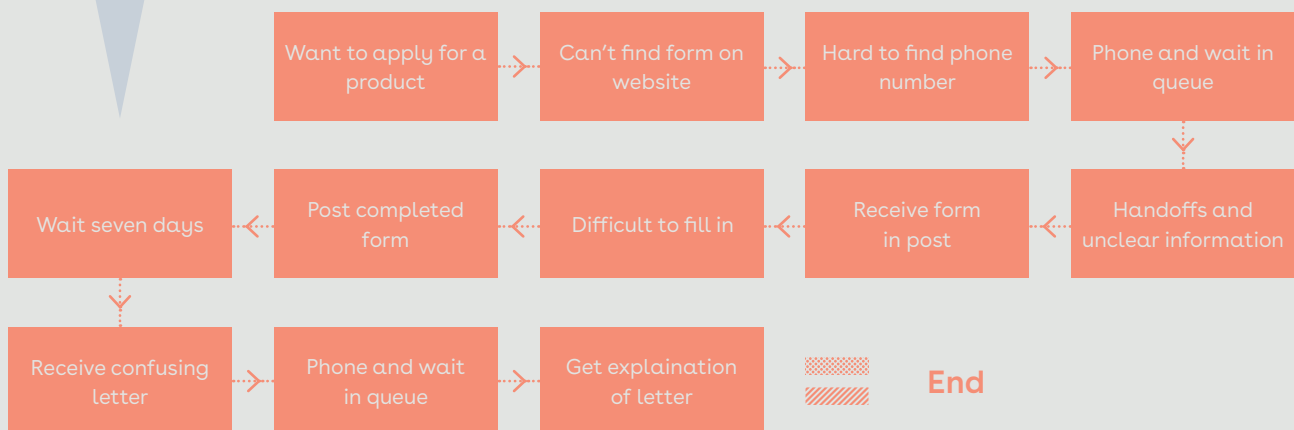


## What business leaders think



Start

What the customer really experiences



The bottom line is that your organisation may not be set up in a way that is frictionless for the customer, but instead will be set up in 'logical' functions or business units. How you remedy this depends on the level of misalignment.

Sometimes it can mean reorganising work, teams, or upskilling and training people. However, it can mean more fundamental changes such as onshoring, outsourcing, or implementing an entirely new operating model.

**A useful way of walking customer journeys is by considering different intents. These may cover several customer journeys, which in turn will cut across many existing internal processes. This can provide you with an invaluable picture of your business.**

There is a brief example provided below:

Customer intent	Customer journey	Start point	End points	Existing internal process
Help me manage my day to day money	I want to open a bank account	I want to understand my bank account options	All my required monthly payments have been successfully made once (or I have used my debit card successfully)	<ul style="list-style-type: none"> <li>Making an appointment (branch only)</li> <li>Providing financial advice</li> <li>ID&amp;V (Identity verification - can be electronic or paper)</li> <li>Credit &amp; fraud checks</li> <li>Account opening</li> <li>Card &amp; PIN issue</li> <li>Internet banking registration</li> </ul>
	I want to know how much money I have in my account	I want to understand different methods of accessing my account balance	I have checked my balance via app and set up weekly text notifications	<ul style="list-style-type: none"> <li>Website FAQs</li> <li>Mobile banking registration</li> <li>Account alerts updated in branch</li> </ul>

Above all – remember that the customer doesn't see 'channel' they see 'service'. Consider what implications this then has on the consistency and continuity you provide across your channel, products, and services.

Does your call centre close at 8pm, but the Twitter account stay open 24/7? Is that right for your particular customers?

### 3 Collaborate, collaborate, collaborate

**The importance of this cannot be emphasised enough. If your business is set up as a series of functions which don't correspond to the way your customers interact with you, and these functions aren't set up to collaborate, then you have a problem.**

At Gobeyond Partners our ICE (Interactive Collaborative Experience) process is designed to bring people together from across organisations for a series of workshops. With careful management these break down organisational barriers, enabling closer relationships, and aligning people towards a shared purpose.

There are several essential attendees required to ensure the success of any cross-functional approach:

Group	Requirements
Senior Leaders	If senior leaders are to attend they must be 100% present; there will be a strict 'no phones' rule during sessions. Leaders must come with an open mind, not dominate the process and actively encourage an open and honest culture with no blame, where all opinions are viewed as equally valid.
Representatives from entire end-to-end	Every function involved in the end-to-end process should be represented, including key suppliers and the front office.
Key support functions	All supporting functions who would be involved in delivering or sanctioning any change should be fully involved in the entire process: typically Customer Insight/Complaints, IT (development & architecture), Risk, Compliance, Legal, HR, Marketing, Planning, MI, Quality, L&D, Supplier Management etc.
Process experts	It is vital to include staff who actually do the process, ensuring there is full coverage of the end-to-end. This may include outsource/offshore partners. Their knowledge is often most sought-after during the workshops (especially during design) and they can become a bottleneck so having enough good people is important.
Facilitation team	Effective facilitation is key to engaging and maintaining momentum.

## 4 Strategy > Design > Technology

**We've all heard the pithy arguments: the rate of technology change is exponential; disrupt yourself or be disrupted; adapt or die.**

However, all this highlights is the need to incorporate new technology.

Using technology to align your existing online and offline channels may be the right answer – but it may not. The use of technology has to fit with your overall strategy and be executed with a good design. If you've done it right – this will be driven by customer journey thinking.

One example we've seen is a major financial services business deploying a mobile app so their customers could quickly and easily change their current or business account address. Unfortunately, the project didn't consider customers of other bank products, who were understandably confused and frustrated when they couldn't use the app that was released.

Needless to say this led to plenty of remediation, redevelopment, and a relaunch of the app. This is not only a case of poor design and tactical deployment, but demonstrates a dismal lack of collaboration across the organisation.

We also frequently see issues with mobile applications for connecting dispersed front-line workforces to corporate systems,

common in construction and engineering, facilities management, or healthcare.

The boardroom conversation typically goes something like this:

**"we have a huge amount of paperbased reports being submitted, let's give people an app on their phone to save money, time, and improve data integrity".**

The theory is great, but the execution is often terrible - neglecting to consider all the use cases, or even the type of audiences, some of whom don't have mobile phones. This typically leads to poor adoption rates and additional work, as paper-based processing continues alongside the app.

## 5 Governance and measurement

**If you've managed to do 1 - 4 then you are going to be in a fairly good place. However, to deliver sustainable change you need to have the right management and measures in place. Many businesses appoint a 'journey owner' who is responsible for overseeing their particular customer.**

**A journey owner will often focus on:**

### **Design:**

They are the design authority for the journey, signing off tactical changes but more importantly setting the future direction and driving the business relentlessly towards it.



**Management:**

They should be responsible for the management of end-to-end process performance (this is not the same as being the hierarchical manager of all the people); supported by a journey dashboard, the owner regularly reviews performance and takes action where necessary.

**Improvement:**

They also drive improvement and coordinate changes arising from multiple sources (including technology, regulatory, legal or market-driven change).

Similarly, it is essential to ensure that metrics across these teams conform to the goals of the entire journey. The old adage of 'what gets measured gets done' is correct - all your good work can easily go to waste if your organisation's KPIs, metrics, and targets don't reinforce what is now in place.

Typical journey metrics would include (in each case relating to the end-to-end journey rather than individual contact points within it):

Customer satisfaction	Net Promoter Score, Customer Effort Score
Quality	Right first time (from a customer perspective)
Speed	End-to-end lead time to complete the service
Cost	Total cost to service the journey
Process-specific	Measures specific to the nature of the journey: for example, if it is a sales process, then Sales Turnover might be an appropriate metric

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## Conclusion

Your customers are asking for a better experience from your business, regardless of your internal 'channel perspective'. By walking your customer journey across your products and services, you can quickly understand what needs to change. The hard part is building a purpose and culture which binds your people together across channels to enable collaboration for the customer. Those organisations who can achieve this will not only transform customer experience, but increase retention and reduce the cost to serve.

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