



THE CUSTOMER SERVICE PERSONALIZATION STARTER KIT

5 STEPS TO MAKING PERSONALIZATION A REALITY



It's the 2020s; PERSONALIZATION is a must-have

What do customers want from you?

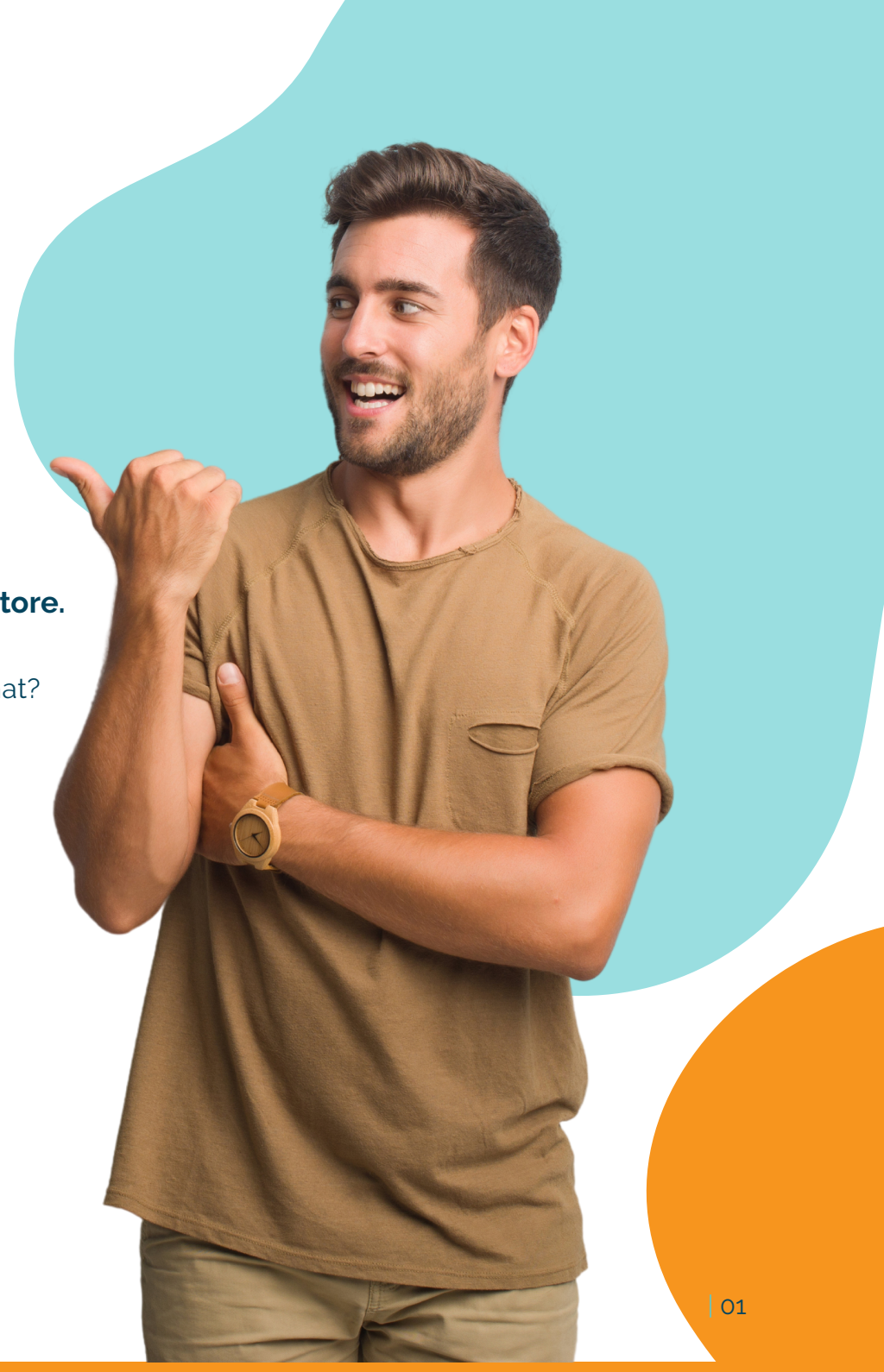
They want service, in any channel, that's as good as service in-store.

But how many brands can honestly say that they offer anything like that?

Virtually none.

In reality, just 8% of customers believe the businesses they buy from offer great service; limited personalization is a common theme in their feedback. ¹

- ➡ Businesses offer various channel options but customers can't move between them.
- ➡ Businesses ask customers to invest time explaining their needs but customers get shunted into the same generic flows regardless.
- ➡ Businesses ask for plenty of personal data but customers are greeted like strangers at every touchpoint.





The challenge is to provide services that meet the individual needs of your customers as well as being fast, effective and affordable.

Is that remotely possible?

The answer is yes. What's more, personalization can do as much to benefit businesses as it does to benefit customer experience.

This guide will demonstrate simple methods to offer personalized service at any scale.

The goal is clear: whatever channel (or combination of channels) your customers use, they should get service that rivals the in-store experience.

89%

of digital businesses are investing in personalization¹

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'When your customers feel heard and listened to, they feel connected to your brand as an individual, so they're more likely to advocate on your behalf.'

And those customers-turned-cheerleaders will be using their megaphone to champion the great experience they've had with your company.'

Shep Hyken

WHAT IS CUSTOMER SERVICE PERSONALIZATION?

3 Things you need to know

'PERSONALIZED' DOESN'T MEAN 'PERSONAL'

Here's the first mistake businesses make with personalized service: they confuse it with 'personal' service.

Personal service means friendly and empathetic agents, and that's great – there is no downside to service that 'feels' personal. But politeness and personalization aren't the same thing.

PERSONALIZATION IS DATA-HUNGRY

Personalization feeds on what you know about customers; your success depends on your ability to gather data, and to make the context of every enquiry available to agents and automated processes.

That data will generally exist in systems like your Helpdesk and CRM. Integrating those systems will be key.

PERSONALIZATION RELIES ON AUTOMATION

Automation is often thought of as impersonal, so how can it be essential to personalization? It's a question of scale; with automation embedded in your working practices, you can create customer experiences for virtually any scenario.

If you leave automation out of the equation, there are simply too many tasks for personalization to be realistic.

72%

of customers who contact you expect you to know:

- who they are
- what they've purchased from you
- why they've contacted you previously ²

PERSONALIZATION HAPPENS

AT EVERY TOUCHPOINT

WEBSITE



Amazon has a powerful recommendations engine that it uses to personalize the shopping experience. The eCommerce giant is known for suggesting recommended products based on the customer's purchase and view history.

The result: 35% of what consumers purchase on Amazon comes from product recommendations.³

CONTACT CENTER



VidaXL personalizes contact service for customers across three continents by automatically routing calls based on location. The company also provides agents with real-time customer data during calls.

The result: VidaXL has reduced its call abandonment rate to 1%.

APPS



The Starbucks app is a great example of digital personalization. The app homepage contains offers and recommendations tailored to the user and based on their order history and location.

The result: Starbucks attributes 40% of its total sales to its app-based rewards program.⁴

THE BENEFITS OF SERVICE PERSONALIZATION

BETTER CUSTOMER ENGAGEMENT

Personalization doesn't just engage customers by encouraging them to make repeat purchases. Customers who love your service are also more likely to recommend your product, read your emails, and share their data with you.

70%

*of millennials are frustrated with irrelevant marketing emails, and prefer personalized contact.*⁵

LOWER OPERATING COSTS

Personalization can reduce contact center operating costs in many ways. Solving issues proactively reduces the need for customers to contact your business, while better routing speeds up handling time and personalized self-service deflects queries.

\$8

*Live channels such as phone and live chat cost on average \$8.01 per contact, while self-service costs just \$0.10 per contact.*⁶

IMPROVED AHT

Personalization speeds up support and makes it easy for your team to dig deeper into customer profiles to discover relevant data. Customers speak to the people best placed to help and spend less time explaining their issues to multiple agents.

90%

*of customers rate an immediate response to their query as "important" or "very important".*⁷

THE BENEFITS OF SERVICE PERSONALIZATION

INCREASED CUSTOMER LOYALTY

Providing a service that closely matches a customer's needs has been shown to improve loyalty, and it's easy to see why. Customers get an experience that better helps with the challenges they are facing.

91%

of customers say they are more likely to shop with brands that recognize them and provide relevant recommendations⁵

BETTER UPSELLING AND CROSS-SELLING OPPORTUNITIES

More customer data gives you detailed knowledge of the needs and challenges individuals face. You're better placed to recommend products and services that meet their requirements at just the right moment.

67%

Loyal customers spend 67% more than new ones.⁹

HIGHER FIRST CONTACT RESOLUTION

Personalization is an easy route to improved FCR. Routing callers to the most relevant agent is obviously the most important factor, while providing agents detailed, real-time information enables them to solve problems on their first attempt.

15%

By improving the way calls were routed, Delta Airlines reduced misrouted calls by 15%.¹⁰

5 STEPS

TO CONTACT CENTER PERSONALIZATION

Contact center personalization is all about making sure you meet customers' needs when they contact you.

Any business can make significant strides towards fully personalized service in just five simple steps.



#1 RECOGNIZE YOUR CUSTOMERS

“The integration challenge”

There's no such thing as generic personalization; if a service doesn't fit the needs of a specific user, it's not personalized!

As a result, your first and most important challenge is “recognizing” your customers.

If your customers need to identify themselves via something like a reference number, you've already missed your first opportunity to offer personalization; you're already shunting each person into a standard process.

The solution

Modern API integration makes it possible for any contact channel – telephony to email to SMS to WhatsApp – to access customer data in systems like your CRM.

It doesn't matter whether your contact center infrastructure is in the public cloud, hosted private, or it's an on-site legacy system; the integration barriers should be virtually non-existent.

Therefore, whichever channel the customer arrives on, a CRM lookup identifies them before you start offering them services.

62%

of contact center pro's say
“integration with existing systems”
is the main challenge they face
when implementing strategic
investments. ¹¹



#2 DIRECT CUSTOMERS STRATEGICALLY

“The inbound contact challenge”

Once you've linked CRM data to a specific customer, what do you do with it? How do you make sense of it?

Recognizing them is the first step, but personalization comes down to a series of decisions you'll make about the services you offer next. Will you route the customer to a contextually aware self-service option, or send them to an agent? If so, which one?

CASE STUDY:

EXPONDO



Equipment marketplace Expondo has customers across Europe who speak in 20 different languages. They use babelforce to set up automations that ensure each customer who calls their business is routed to an agent who speaks their language, automatically, and with zero input from the caller.



The solution

This is essentially a methodology challenge. Your business already has access to an enormous trove of contextual data; your task is to identify the kinds of data that can tell you something substantive about the service pathways you should offer. When it comes to contact routing that data should include:



Customer value /
VIP status



Open Helpdesk
tickets



Recent
purchases



Feedback
scores



Recent
interactions



Churn
risk



24%

Just 24% of contact center leaders collaborate fully on process design within their organization.¹²

#3 PREPARE

SPECIFIC CUSTOMER EXPERIENCES

"The No-Code challenge"

You have the right data. You have the right methodology. Now you just need to put it into action.

Unfortunately, this is as far as most businesses get. There's a substantial technological barrier that prevents them getting any further without a frankly incredible investment of time and money.

After all, you could design 1000 hypothetical customer service experiences, catering to every possible customer need. But how are you going to build them?

The solution

At this point, many customer service operations opt for a No-Code platform approach. No-Code platforms put direct control into the hands of senior professionals by providing visual tools that don't require specific tech skills.

The bottom line is that personalization is an 'iterative' process. In order to personalize, CX leaders need the option to design, implement and iterate upon processes without reference to expensive development teams. No-Code tools are the most direct and accessible route to this outcome.

#4 MOVE

CUSTOMERS EASILY BETWEEN CHANNELS

“The omnichannel challenge”

In many stages of the personalization process, the goal is to make decisions about the kinds of assistance customers will receive.

That's not the full picture though; it's also vital to give customers options. In the contact center that usually means channel choice.

The standard set of channels that modern customers expect tends to include phone, email, 2-way messaging (including SMS, WhatsApp and similar channels) and a range of self-service channels including conversational AI.

The solution

The basics of allowing customers to move between channels are within reach for virtually any organization; this is just another aspect of the integration challenge.

The real obstacle is allowing customers to move around without losing the context of their interaction.

But context can be captured in a number of ways. For example, automated conversational systems can create transcripts of voice input and add that information to a ticket. The ticket remains associated with the customer, preventing the loss of important information.



#5 GET PROACTIVE ABOUT CUSTOMER SERVICES

“The outbound challenge”

The final step to meaningful personalization is reaching out to customers proactively. Contact channels are predominantly digital, making them easy to integrate and extremely affordable.

The ability to automate outbound contact at scale – by simply defining triggers for automated outbound contact – make this even more appealing.

At the same time there are relatively few brands excelling at outbound contact for service; this creates a rich area for competitive advantage.

CASE STUDY:

AT&T



AT&T noticed that as much as 10% of contact center traffic was from new customers confused by their first bill. It dealt with the issue by proactively sending customers more information with their first invoice.



The solution

There are two steps for this challenge:

- Integration of an outbound messaging system or dialer
- Automation of the "trigger" which sends the message or places the call

For example, it's entirely possible to use SMS to offer customers who give negative feedback the chance to speak with an advisor.

That's a retention use case, but there are also numerous applications for service and sales.

Fundamentally, the resources you need for this are the same as those required for intelligent inbound contact. What's different is the impact well-structured outbound contact can have on customer experience.

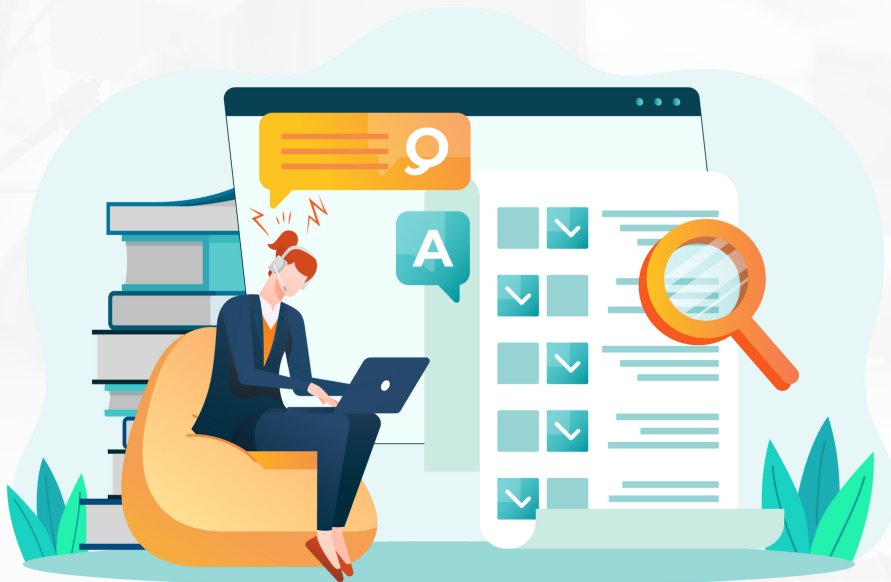
Personalization is easy

with No-Code integration

Each step in the journey towards personalization sounds complicated - and it is, if all of your systems work independently of one another.

But integrating your contact center software enables your tools to share data and work together. You can then set up automation to provide personalized experiences.

And what's more, you can do all this with a No-Code tool. This makes it possible for anyone to integrate tools and set up automation, even those without coding experience.



Here are the steps you need to take

➤ Connect your tools

The first step is to connect the different tools you use in your contact center. This could include your CRM, dialer, IVR, router, and more.

Most tools have an API that enables them to connect with other software. No-Code tools make integrating your software as easy as choosing which products you want to connect.

➤ Set up automation

Once your tools are connected, just set up automation to enable personalization. To do this you use triggers – actions in one of your tools that cause something to happen in another.

No-Code tools like babelforce often have pre-built automation, so implementing them is as simple as selecting the features you need.

WHY TALK TO BABELFORCE

ABOUT CUSTOMER SERVICE PERSONALIZATION?

AUTOMATE 30-70% OF OUTBOUND TASKS

There are really no limits on the personalized experiences that you can create once you have the infrastructure in place. The component parts include real-time data access, automated outbound dialing, and agent assignment – all features of babelforce's intuitive No-Code contact center platform.

REACH BUSINESS BENEFITS OF €5 MILLION PER 50 AGENTS

Businesses see benefits between 400k and €5million per 50 agents or 50 concurrent channels. Why the substantial range? The biggest returns are for businesses that focus on retention, sales and cross-selling. But a singular focus on reducing cost-to-serve still creates huge savings.

As we've seen, businesses achieve personalized service by focusing on a few key areas:

- **Recognizing** their customers and accessing real-time data about them
- **Creating** many potential experiences, starting with the most common
- **Automating** substantial aspects of contact handling
- **Integrating** support channels for a genuinely agnostic approach
- **Adopting** proactive contact and going the extra mile to support top quality CX

The substantial gains in each of these areas, coupled with rapid go-live times means that businesses using babelforce generally see solid bottom-line improvements within the same financial year as the initial deployment.

WHY TALK TO BABELFORCE

ABOUT CUSTOMER SERVICE PERSONALIZATION?

GO LIVE IN UNDER 8 WEEKS

In a typical enterprise setting needing one or more custom integrations, Go-live typically takes 6-8 weeks. End-to-end proof of concept takes just 2-3 weeks. In practical terms, that means you can go from concept to execution in a few months, guaranteeing virtually zero disruption to your operation.

INCREASE CUSTOMER RETENTION 5% OR MORE

Automation can increase customer retention. Specific and automated retention activity has a tremendous impact on customer lifetime value but really, any kind of generic outbound service positively impacts retention. It's easy to set up; agents can manage retention activity in their downtime and the results are staggering.

"Customer service leaders often believe that personalization is some wildly ambitious and unattainable goal.

That's just not the case; any business can take simple steps to bring personalization into their services.

The secret, of course, is No-Code automation; only one quarter of customer service teams can collaborate in process design, and that hampers the real advances in automation and in CX.

At babelforce our goal is simple; we make customer service easy for customers, agents and leaders.

That starts with an approach to automation which puts control of CX into the hands of the people who live and breath it daily."

***Pierce Buckley -
CEO, babelforce***



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