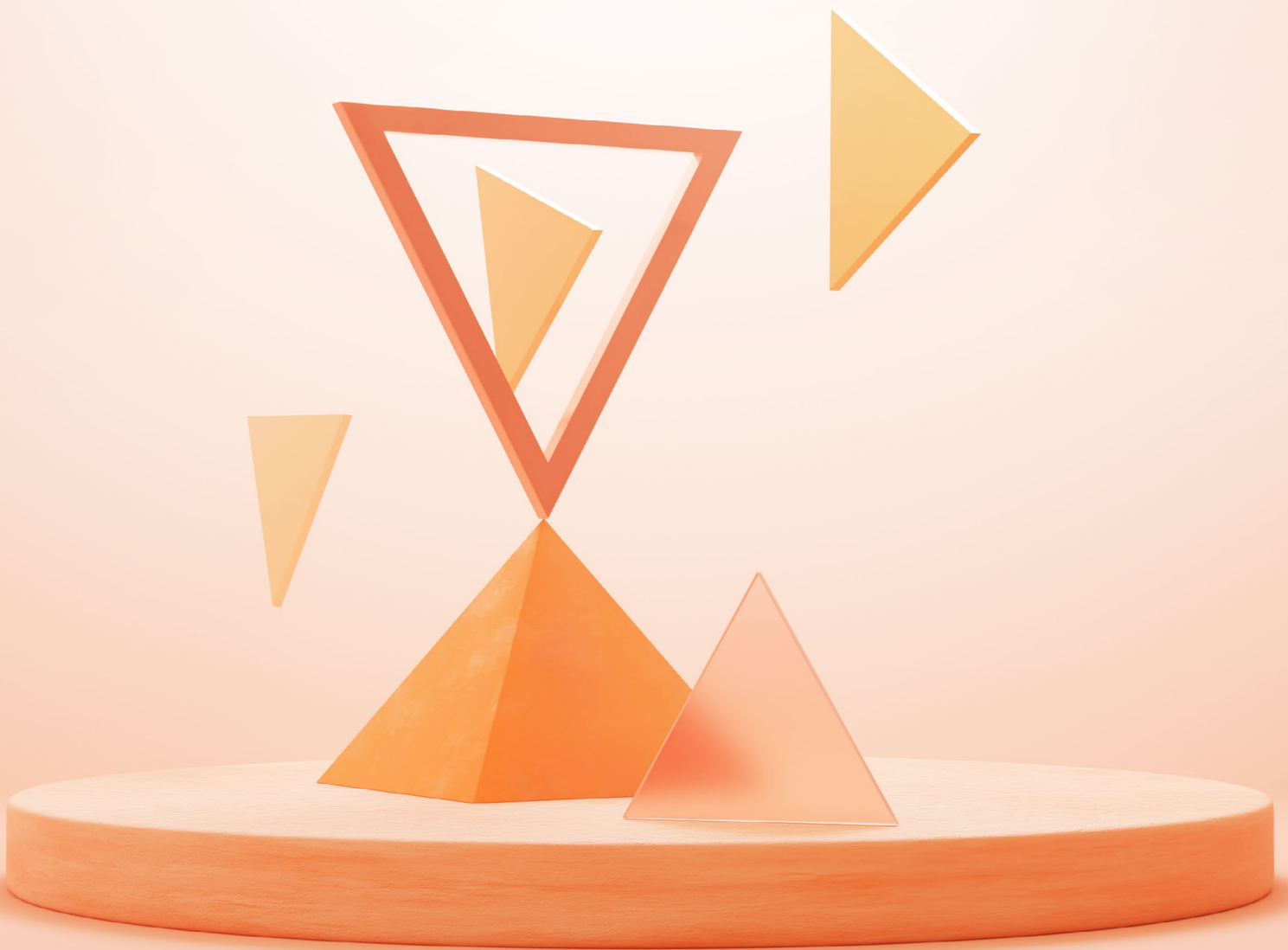THE AGILITY PLAYBOOK

How larger companies can score a competitive advantage in CX

zendesk

Serena Williams, Lionel Messi, Tom Brady—what do these athletes have in common? To be sure, they've reached the top of their professions due to hard work, fierce dedication, and the ability to adapt as their sports evolve. Yet other players put in just as much effort, so what sets these high performers apart?

It's by no means an easy task, staying at the top. It takes constant vigilance, a willingness to discard outdated tactics, and being at ease with the uncertainties that come with change. In other words, it's an agility mindset— the ability to spot changing trends and then pivot on the fly to remain one step ahead of competitors.

Much like star athletes, mid-market and enterprise businesses dominate the field and use their considerable resources to remain successful—until they don't. History is replete with once-successful companies that were unable to keep up with the rapid pace of innovation or were blindsided by unanticipated market challenges, from swiftly changing consumer preferences to disruptive global pandemics.

Business agility requires three key elements:

1. Making it easier to hear from your customers

2. Building teams that can stay productive during times of change

3. Investing in flexible technology that supports your company's customer experience goals

For mid-market and enterprise businesses, however, that's easier said than done. So how can a company get there?

To better understand how businesses are thinking about and becoming more agile, we surveyed 3,900 customers and 3,900 customer experience and customer service leaders, managers, and agents. We also analyzed top agility capability data from more than 90,000 Zendesk companies across 175 countries.

Train for agility, deliver better CX

Whether your business has just vaulted into the mid-market segment, expects to cross the threshold into the enterprise market, or has been a market leader for many years, your company likely faces serious challenges to its ability to continue building on previous wins.

Your business needs to not only understand what customers want, it must have a plan for responding to emerging customer experience and service trends in the future. And when market opportunities arise, will you be able to say with confidence that your company can take the high ground before the competition grabs it?

01 Put the voice of the customer first

If you're leading a mid-market or enterprise company, chances are you already know how important customer service is to the business. But it's one thing to think that you're providing gold medal service—it can be something else entirely when you actually listen to what customers are saying. Customers essentially serve as a warning sign, not just about impending danger but also opportunities. And continually monitoring these signals is important because, as we all know, things can change quickly. Here are some ways to ensure the voice of the customer is being heard loud and clear throughout your organization.

Create reliable methods for hearing what customers want you to know—and offer choices throughout the customer journey

Savvy businesses have known for years that customers want options when it comes to customer service, whether that's multiple ways to contact a business or the ability to switch channels without ever having to repeat information—never a good thing.

32%
Only 32% of enterprise companies offer three or more channels to their customers.
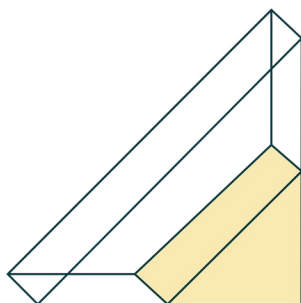
Still, just 34 percent of mid-market companies offer three or more channels to their customers, and that number drops to 32 percent for enterprise outfits. That means that the majority of companies are missing valuable opportunities to hear from customers where they are, and likely frustrating them before they even connect with a support agent.

Customer service channels aren't the only ways to hear from customers. Surveys and self-service can also be valuable tools. Integrating online surveys into the entire customer journey, via partners like Qualtrics, Stella Connect by Medallia, or SurveyMonkey, for instance, can help businesses collect feedback every step of the way. Self-service is also an important window into the customer world. Keeping your help center up-to-date and nurturing active user communities are just a few ways to help customer ideas bubble to the surface.

Make sense of it all with comprehensive analytics

For businesses with tens of thousands of customers—or millions—opening the information floodgates isn't enough. Without the right tools, these data points are just snapshots in time, resulting in only a partial view of the customer journey. Without insight into real-time trends, it'll be next to impossible to get a sense of where your business needs to go.

Beyond identifying trends in tickets, you'll want to examine how your customers use your product or service. Would a concerted push toward self-service make sense for the business? Do you need to shift agents to different channels or hire more employees? Answers to these questions will send you along very different paths. You want to make sure you're on the right one.

## Break down silos by integrating CX data across the business

Data culled from the customer experience can help your support team provide better service, but keeping that data locked in with that team is a lost opportunity. Customer feedback and related data should be shared across your organization; from the product team to marketing, this information can fuel informed, data-driven decision-making that will boost customer acquisition and loyalty, as well as profitability.

Focus on the entire experience with a complete picture of the customer

So now you have reams of customer data, but what good is information if it's fragmented or not getting to the right people? Be sure your agents have a complete view of the customer—every interaction and detail. The result will be better outcomes for customers, and for your company.

37%

37 percent of agents at mid-market companies say they need more customer context to provide better experiences.
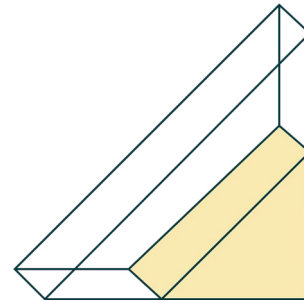
CX data is more than just surveys

Here are some examples of the CX data that can help agents, admins, and business leaders drive the best customer experiences:

- **Customer data**: purchase history, customer service history, billing information, social media data, loyalty programs, service level agreements, 3rd party behavioral data

- **Business data**: inventory management, supply chain and delivery data

02

Working better—and smarter

With better access to accurate and relevant data, it's also important to focus on improving how your support operation works. If you're worried that improving productivity will be akin to pulling teeth, don't worry: you're not alone. For example, 88 percent of enterprise leaders report that making changes to customer service is challenging.

> **Change is hard, but high-performing mid-market businesses are 1.5 times more likely to adopt digital improvements and set themselves up to scale.**

That said, helping your support team work better is worth the effort. Improvements can increase customer satisfaction, improve employee engagement, reduce costs through operational efficiency, and even increase revenue. These are wide-reaching benefits both for customer experience and your business as a whole.

Create standards and processes that drive collaboration and knowledge sharing

While CX integrations with partners like Zoom, Atlassian, and Slack saved the day when we suddenly shifted to remote work, collaboration remains a trouble spot for all businesses. Consider this: 90 percent of leaders report that their solution makes it easy for agents to contribute to their knowledge base, yet agents tell a different story. Only 57 percent say they can conveniently discover knowledge base articles. Giving agents all of these tools in one, easy-to-use place makes collaboration and knowledge sharing much simpler to achieve.

High-performing mid-market companies are 1.5 times more likely to adopt digital improvements that make these changes a reality. Creating an environment that facilitates open collaboration and the sharing of knowledge is a powerful way to improve team efficiency. For example, if an agent solves a tough problem for a customer, documenting and sharing that effort can save other agents a lot of heartache, and even better, help customers faster.

## Use automation to reduce redundant tasks and change management cost

Nothing kills team efficiency and morale like forcing employees to do work that could be automated. This is where automation shines, from intelligent ticket routing to automated email responses. Every routine task that can be taken off an agent's plate means more time spent solving complex customer issues.

Build out workflows to increase quality, transparency, and control

Put the flow into workflow: with simple business rules, companies can standardize processes and help the entire organization move in lock step. By streamlining your support operation, workflows ensure consistent execution (and likely faster, better customer experiences). They also make it much easier to make large-scale changes without having to retrain your customer service staff—a key priority for any agile company.
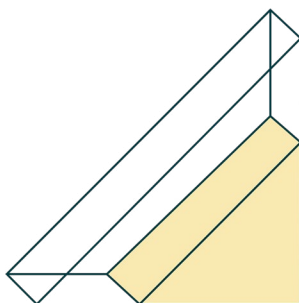
44%

Only 44 percent of enterprise companies report using bots in their day-to-day work, compared to 51 percent of mid-market businesses.
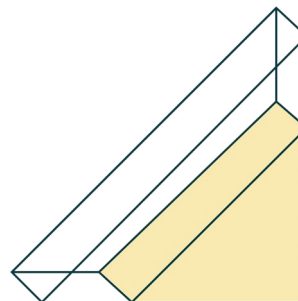
42%

42 percent of customers say they're open to working with a bot, and bots are increasingly popular with customers under 40.

Constantly learn and adapt by powering smarter business with AI and machine learning tools

These tools can extend automation across the entire customer journey, making agents more productive and self-service more accessible. While not a replacement for human beings, they can be quite helpful. With AI-powered chatbots, for example, companies can take advantage of always-on support and respond to customer questions even when agents aren't in the office. If a handoff is needed, bots can get their human counterparts quickly up to speed with key context to make problem solving faster and more efficient. 42 percent of customers say they're open to working with a bot, and bots are increasingly popular with customers under 40.

03 Choosing the right technology

Here's a bit of context: 63 percent of mid-market companies view customer experience primarily as a revenue driver, and 24 percent see it as a cost center. No matter where you fall on that spectrum, prioritizing agile CX can actually improve the bottom line. 22 percent of business leaders report that having high agility reduced their costs by 25 percent or more; another 38 percent report cost savings between 11 and 25 percent.

25%
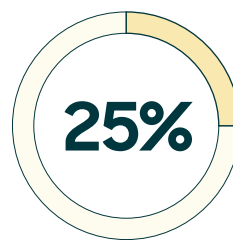
Nearly a quarter of business leaders report that having high agility reduced their costs by 25 percent or more.

Leading companies are 5.8 times more likely to say they give agents a single view of important customer context.

When considering where to invest, tech is a good place to start. As previously mentioned, providing a single unified workspace for your agents plays a significant role in boosting team productivity. It can also help gain a better view of the customer. Leading companies are 5.8 times more likely to say they give agents a single view of important customer context. And it remains a top issue for mid-market and enterprise businesses alike.

Just like athletes rely on tools that help them get stronger and faster, businesses rely on their own set of tools to help them better serve their customers. Whatever you have in your tech stack, these technologies should value openness, seamless integrations, and flexibility at their core.

Empower your team to move quickly and adopt low-code tools

The days of on-premise software, which requires significant onsite support, are thankfully on the wane. Your team needs to be able to adopt new, low-code tools that don't require significant upkeep, and they must have the option to use these options without months and months of red tape. Setting up workflows, conditions, and triggers within your CX platform should be easy and with the help of partners like Workato or Tray, can add to the seamless agent experience you're going for.

Take the Covid-19 pandemic, for example. Support teams were faced with a sudden transition to remote work while customer interactions rose, often in unexpected channels. Those companies that were agile adapted quickly and saw customer outcomes improve.

Open technology is your friend

New technology can be great—until you realize that it can't be customized to suit your needs. Keep in mind that being agile means responding quickly to unexpected challenges. Your technology platform should be customizable to meet the unique needs of your business now, and over time. And if you're lucky to have dedicated development resources, it should work with their preferred set of tools and development languages.

Integrate frequently used apps and key partners

The reality is that you'll never use a single piece of technology to support the customer experience. Whether it's a CRM, e-commerce software, or productivity tools, you'll need customer support software that integrates easily with whatever your team requires.

Consider speed to market, usability, and scalability for your tech investments

When ticket volumes increase, the top performers in the mid-market space typically adopt three sets of features compared to low-performing competitors: help center articles, macros, and groups and automations. Ask yourself if your technology stack will grow with the business, has easily added functionality, and will actually help your team provide better customer service.

Conclusion

Even the best training programs have short-lived effects without strong fundamentals. Stay consistent and deliberate about listening to customers, streamlining teams and processes, and taking a disciplined approach to technology decisions, to make CX agility a way of life.

Ready to take your agility training to the next level?

Start a <u>free Zendesk trial</u> to learn more.

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