

Interai Presents

Redefine Your Customer Experience

in 2022



interai

01 The 2022 Problem

2022 is going to be a challenging year. Apart from the obvious reasons of COVID, climate change, and the human race moving a few steps closer to its extinction, D2C brands are expected to go above and beyond to satisfy their existing customers and attain new ones. Let's break this down to the main things you need to bear in mind in 2022:



CUSTOMERS DEMAND PERSONALIZATION IN ALL TOUCHPOINTS:



Once tied only to targeted offers, the personalization expectation is now broadened to all customer touchpoints with either the product or a human being.

Whenever your customers interact with your brand, their basic expectation is that you'll know who they are - when you suggest them your products, when you communicate with them via emails, and when they proactively reach out to you. [McKinsey & Company](#) put it well when they referred to this expectation as the "hygiene factor - "customers take it for granted, but if a retailer gets it wrong, customers may depart for a competitor."

Going on a call with a customer without knowing their data history is a big no-no. In 2022, the response to this misstep will be deemed extremely poor CX. You must make sure that you know who you're talking to on the other side and that there aren't any gaps between what you know about this customer to what they've been through since they started their journey with you.

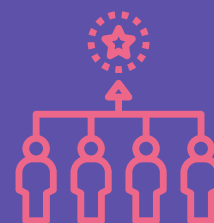
COVID 19 REQUIRES MORE ADAPTIVE COMMUNICATION AND DISTRIBUTION CHANNELS



It isn't pessimistic to assume that COVID is here to stay, it's pragmatic. The brands that follow along with this perception are the ones that prepare and adapt themselves faster to today's challenges. Keep in mind it's not the COVID virus that will last indefinitely, but rather the habits embraced during COVID time that will most probably be adopted forever. For example, nearly [80% of consumers](#) who increased their digital use during the pandemic expect to maintain their usage.

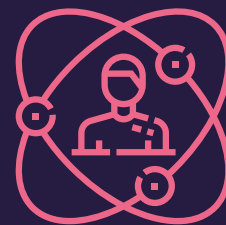
The operational implications for companies are infinite, but they all have one thing in common - speed. Decisions are being made faster and more frequently, communication channels inside companies and with customers have shifted significantly to the virtual world. More communication channels require more systems, which creates a problem of scattered data in multiple systems and a growing challenge to consolidate and streamline all this customer data.

NEW COMPETITION EVERY DAY:



The barrier for entry for D2C brands is very low. The eCommerce software platform, together with low-cost business services such as online marketing, sales, and business development, allows small (and even tiny) players to enter almost every industry and saturate the market even more. As a matter of fact, **it is accepted** that in 2022 the D2C eCommerce sales will grow by 17%. This shows a general trend of the D2C market's growth. These new and small competitors possess the advantage of a startup - they move and adapt fast, and can manage their customer base well with less system complexity. They can make each customer's interaction feel far more personalized and exceptional because it is!

WFH MEANS CX AGENTS ARE REQUIRED TO MASTER MORE SYSTEMS ON THE ACCOUNT OF FOCUSING ON CUSTOMER EXPERIENCE



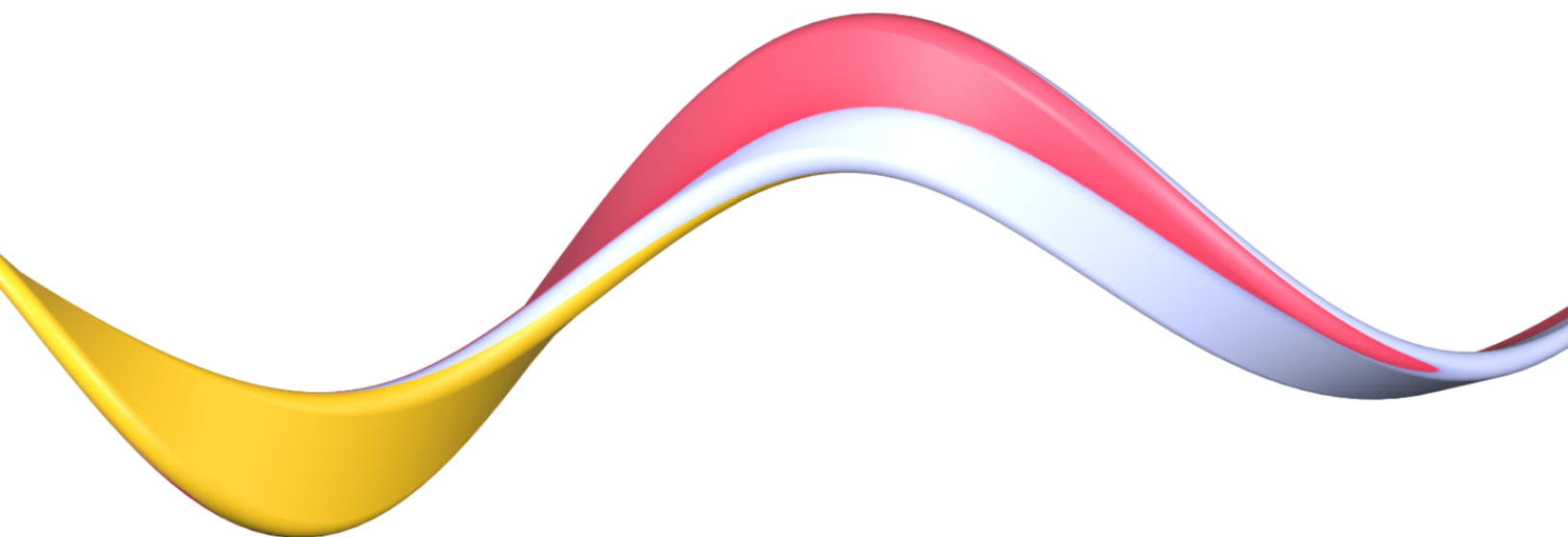
Before the COVID-19 pandemic, the majority (72%) of customer service and support functions operated almost exclusively in-office, with fewer than 10% of employees working from home. The COVID-19 pandemic changed everything. Now, 76% of customer service and support functions have 80% to 100% of their staff working from home. And 89% of service leaders forecast 30% to 80% of their workforce will still be working from home two years from now ([Source](#)).

This massive change in the work environment has a lot of future implications, from managerial perspective and new communications channels, to training, IT, security, and privacy. Don't be too surprised if you'll find yourself with more systems and tools designated to "help" your team operate. More communication, admin, and back-office systems mean more energy on mastering all of them. This increases AHT, but also employee ramp-ups and overall company agility. This also leads to more budget spent on internal tools, APIs, and integration services, as well as higher R&D dependency reflected in the growing amounts of homegrown back office and admin systems. These systems were developed in-house and are even more resource-demanding in terms of internal IT and R&D resources. Therefore, the problem most companies face is how to consolidate scattered data and turn it into insightful and personalized data.



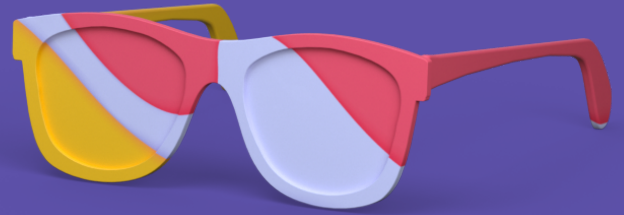
CX AGENTS WILL CONTINUE TO WORK FROM HOME, CAUSING POLICY COMPLIANCE MONITORING HURDLES

The days of walking your contact center floor, joining calls spontaneously, announcing on new or changed policies, and assisting your agents when they need help, have changed. In a remote, WFH environment, agents are working more independently, and managers find it harder to ensure agents got the memo on the new or changed policy (thus juggle, ping, and check in across multiple communication channels), let alone following and complying with the new policy. In this new norm, managers need to find ways to meet their agents where they are with the right info at the right time, and make sure they are following it, all in a remote manner, and that to ensure company's highest standards are kept across all agents.



02 Trends

The problems that were mentioned above are the main issues that each company wants to solve fast or close the gap towards.



AGILE LEADERSHIP - TOP-DOWN AND BOTTOM-UP IN EVERY INTERACTION:



Agility is key. Ultimately, the sweet spot that every organization aspires to is moving faster than its customers' needs.

TOP DOWN

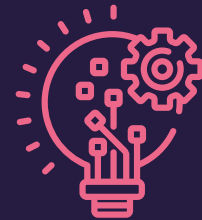
The leadership can incorporate new strategies and implement them fast all the way down, with minimum dependency on the technical departments in the company (dev and IT).

BOTTOM UP:

The ability of the agent to provide tailored resolution to each customer without any interference or need to transfer the call or to loop in other personas like managers or ops people.

In order to reach this state, companies are changing their organizational structure and responsibilities allocation, supporting these efforts with the relevant operational tools that will allow such internal communication.

LIGHTWEIGHT TECHNOLOGICAL SOLUTIONS:

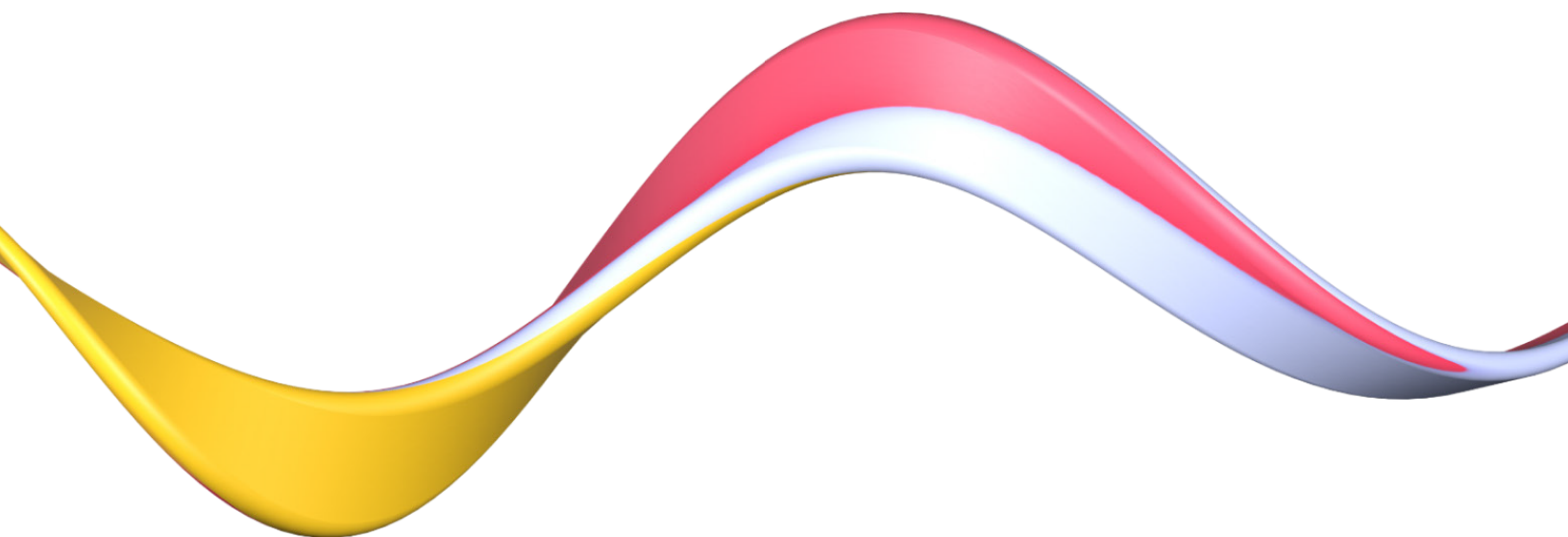


Large end-to-end ERP projects are out, fast time-to-value Low Code and integration solutions are in. The industry of lightweight technology solutions for system integration is booming. Each solution promises fast delivery with minimum people involved in order to get going. This is definitely one step closer to an agility-for-all solution, but still far from providing a seamless experience internally and externally. Though low in code, these solutions still require APIs and integrations, meaning dependency on IT and dev, thus will continue to require maintenance.

CUSTOMER EXPERIENCE STRATEGY AS CORE AGENDA - THE BUSINESS OF EXPERIENCE:



The understanding that customer experience is not just the actual touchpoints with the client, but rather a doctrine that needs to be addressed in every aspect of the company. The company needs to inhale and exhale customer experience into every cell. This new perception puts the CX strategy as one of the core agendas of the company. Accenture referred to it as the [business of experience](#) - shifting from the optimization of customer touchpoints (sales, marketing, front end, tech, CRM) to embarking the entire organization to solving a customer need around a purpose (operating model, purpose and value, innovation, business model, delivery models, employee experience, channel optimization). In a nutshell, it means “to push beyond the CX philosophy and reimagine their entire business through the lens of experience to enable customers to achieve these outcomes. It’s a simple statement but with major ramifications”.



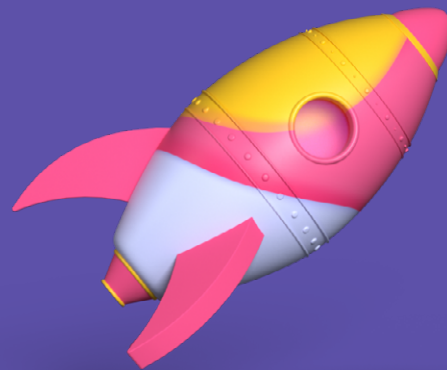
CUSTOMER SERVICE AS THE COMPANY'S INTERFACE WITH ITS CUSTOMERS

(AND A REVENUE GENERATOR):



Technological advancements allow customer service teams to incorporate their full customer stories in ways never seen before. This allows agents to promote customized offers based on each customer's unique profile. Naturally, this new and developed state enables easy access for sales and marketing initiatives to be channeled through the service organization. If every customer that purchases more than \$X per year can receive a coupon of \$Y, and if you send this data automatically whenever an agent communicates with such a customer, you can expand your implementation of the marketing policies and campaigns. This method can be applied in endless use cases - from sales boosters to product adoption initiatives and pure company policies and regulations that are being broadcasted in real-time. The overall impact of these personalized interactions is a true personalized CX that increases LTV and supercharges loyalty.

03 Your Action Plan



So now that you know where the future is heading, here's what you need to do: Identify, map, and create your new customer story, meaning getting a full view of your customers' history, lifespan, and future possibilities you can unfold and deliver to them based on their unique profile of activities and experiences with your brand. Having all these insights in the palm of your hands is where you should be in 2022. So, how can you get there?

FIRST STEP

Which stage are you?

We first need to understand your support org maturity. All support organizations maturity levels will fall in one of the following stages:

DAY 01

: In this phase, you are focused on good-old Customer Support.

Here, the customer support organization tries to accomplish the most basic KPI to survive - killing support tickets. There are X amount of tickets, and we need to resolve them ASAP.

At this phase, the north star of organizations is cost and efficiency above all else. This is when the organization builds its routing solutions, communication channels, and agent profile while establishing its end-to-end customer operations. Moreover, the org views customers as support tickets and “orders” at this phase.

DAY 02

You’ve moved from pure Support to Customer Care, and you’re probably using customer care tools. Organizations that have managed to overcome survival mode will now enter Day 2. In this phase, they will review all their operational systems and workflows and think about how they can do it better - how they can optimize cost while also focusing on interaction quality. These organizations have moved from “orders” and “tickets” and are now focused on how to create a more delightful experience for their customers – both by knowing who the customer is and what they have been through with them (breaking the one-size-fits-all mold) and by segmenting their Customer Care into subject matter expert teams (billing-related, technical support, tier 1 / tier 2).

DAY 03

This phase is the holy grail of every customer-facing org: moving from a cost center to a profit driver. That is to say; the org is mature and optimized enough for the team and its leaders to allocate more resources to support the company's broader efforts of retention & loyalty (revenue loss prevention), revenue generation (upsell, cross-sell), marketing campaigns, and introduction of new products or services, subsequently improving customers lifetime value.

The CX organization leverages the fact it is the forefront of the company: the real, human touchpoint of customers with the company, and so by creating a comprehensive view of their customers – bringing the entire customer context, info, and activity history together, it is not only able to ensure phenomenal, personalized customer experience effortlessly (resolving any customer inquiry in a personalized manner) but also to provide tailored offers to customers, boosting loyalty and retention which are at the core of every company's strategy.

Identify the day of your customer support organization by answering the following questionnaire:

- | | | | |
|---|-------------------------------|-----|----|
| 1 | Do you have a segmented team? | YES | NO |
| 2 | Is CSAT one of your KPIs? | YES | NO |

3	Is customer LTV one of your KPIs?	YES	NO
4	Are retention and loyalty part of your KPIs?	YES	NO
5	Do you also consider your support org to be a profit center?	YES	NO
6	Do you have a consolidated view of your customers in one system?	YES	NO
7	Is your focus aimed mainly at CSAT and interaction quality, more than merely “killing support tickets” and AHT (efficiency)?	YES	NO
8	Do you expect your team to be more proactive (as opposed to reactive) with your customers?	YES	NO

If you answered “Yes” to all these questions, it means that you’re on Day 3.

If you answered “No” to at least two of the questions, it means you’re on Day 2.

If you answered “No” to more than three questions, it means you’re on Day 1.

If you want to move fast from 1 and 2 to 3

TALK TO US →

SECOND STEP

Understand your operational maturity

You'll soon understand what it means. We first need to understand your operational maturity.

- 1 How many admin and back-office systems do you have?

1-2

3-5

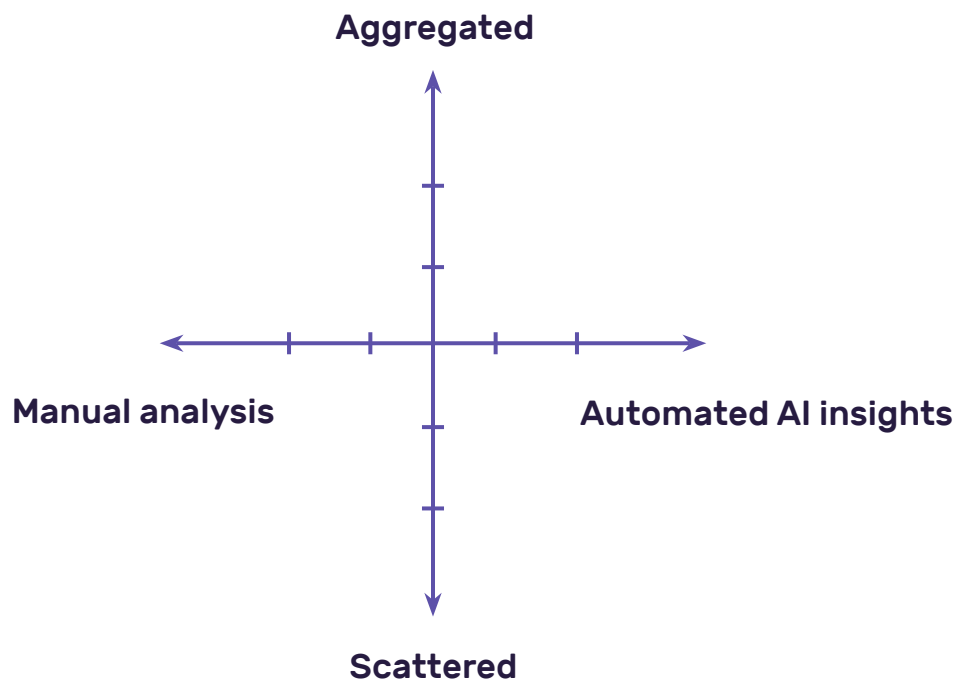
More than 5

- 2 How do agents view all customer data?

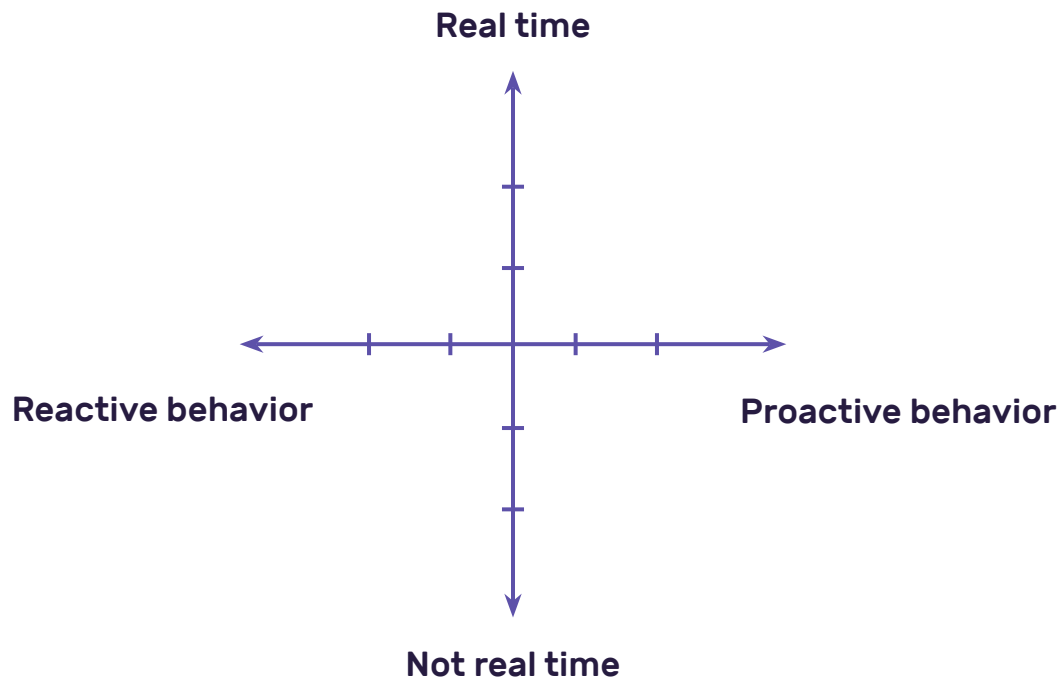
Manually looking up different systems and screens

In a single integrated system (powered by integrations or APIs)

- 3 Please view the following coordinates and place your organization where you're located - is your customer data scattered or aggregated? Are you able to collect customer insights automatically from your systems or is it done manually?



- 4 Same here: are you able to analyze and improve interactions quality in real-time or only in retrospect QA? Are your agents merely responding to the customer's incident (reactively) or are they proactively adding value and optimizing for retention?



If you want to learn more on how to improve your location in these maps, contact us. We'd love to tell you more about it.

[LEARN MORE](#)

THIRD STEP

How to get to day 3

So now that you understand where your CX organization is, use the checklist below to move forward and create a full personalized and customized experience for your customers.

Moving from scattered data, disparate systems and partial customer view to a consolidated customer story

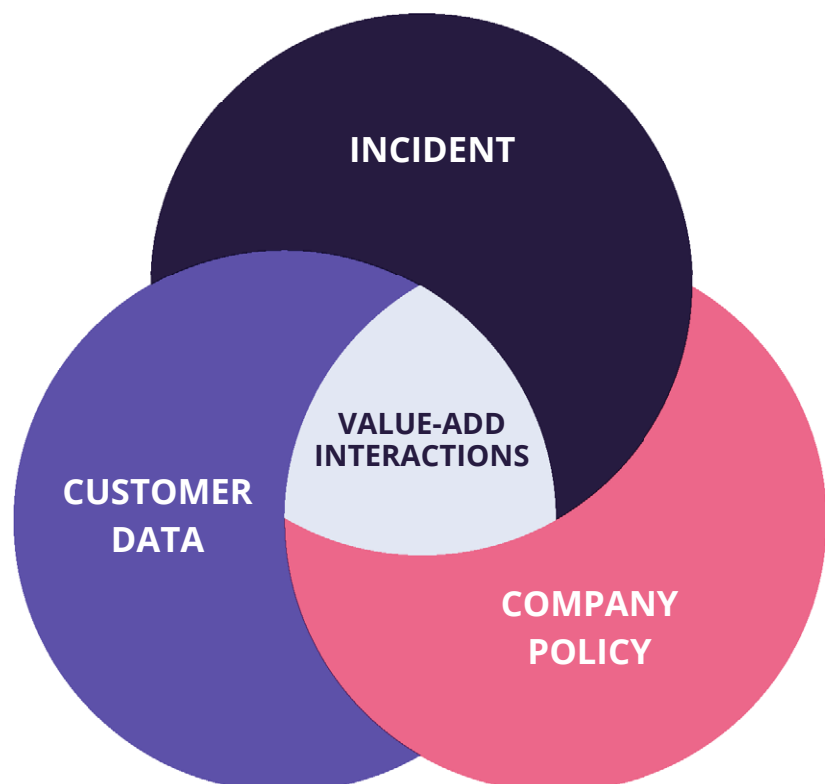
In other words, it's your ability to create a single pane of glass of the customer by consolidating all the relevant data of your customer from all different systems into one place. The first step would be to map all your current systems. Ask yourself, "Do some of them overlap? Do I have one system that can replace another one, subsequently allowing me to become one system lighter?"

The multi-system problem can be the result of a merger, legacy tools you cannot get rid of, homegrown tools developed, growth and scale pains that constantly require changing your systems and processes, a best-of-breed system approach (basically meaning companies get a tool/system for each task or process), or just the fact your services become more complex and a CRM (interactions hub) is not enough and is complemented with multiple back-office,

ops, and admin systems for each service or product you provide. Interai's core premise is to become the single, consolidated layer of all your admin and back-office systems with no development needed, so you'll get all your customer lifetime story in one place from all your systems. Implementing Interai enables the next level of customer experience with all your systems in one app.

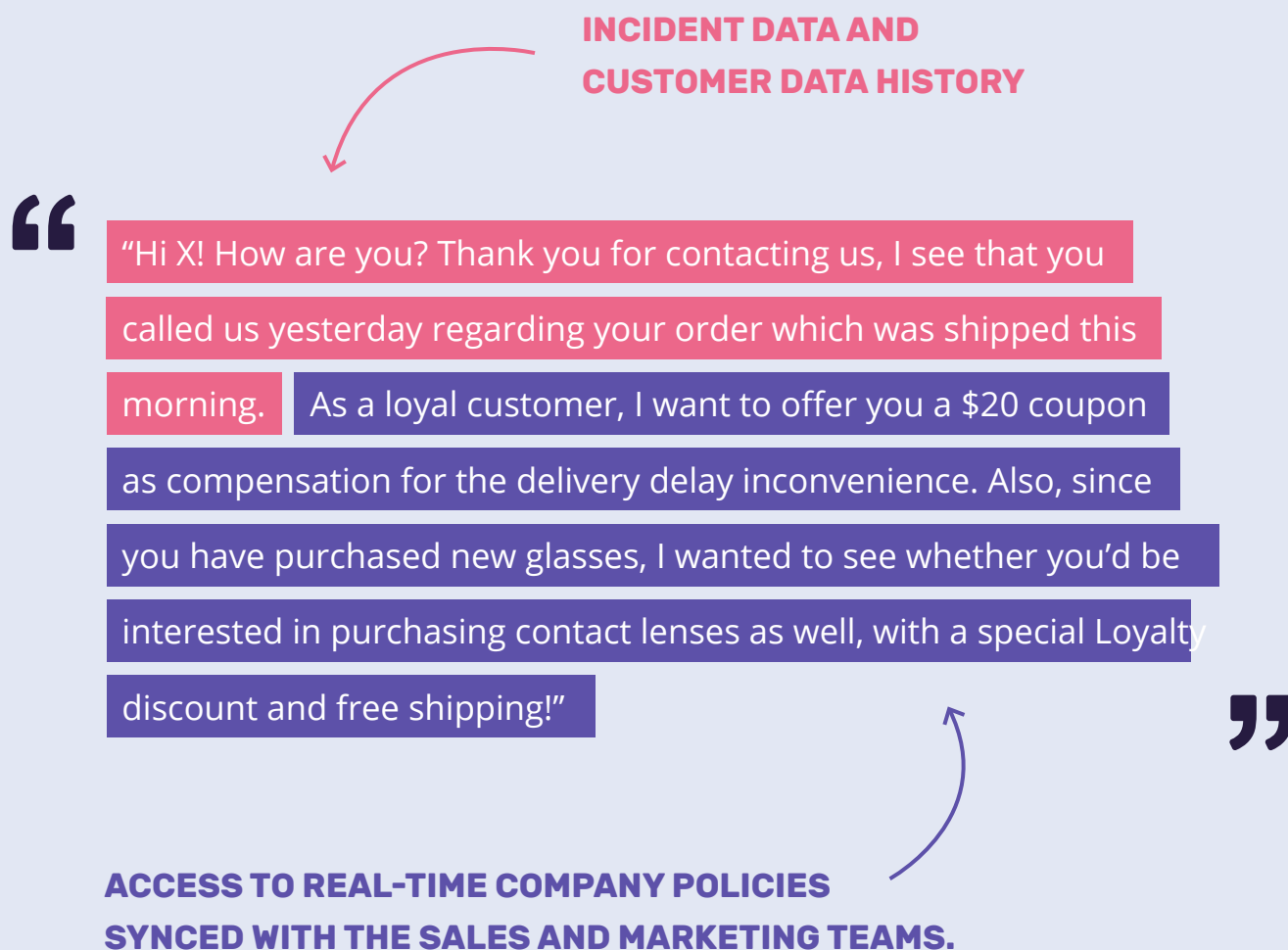
Moving from one-size-fits-all incident-based interactions to value-add personalized interactions:

What are value-add interactions all about? You can look at it as a Venn diagram. Let's take what your agents need to know in real-time when communicating with a customer. We can identify three main pillars: The customer lifetime data, the incident details, and the company's (changing) standards and policies.



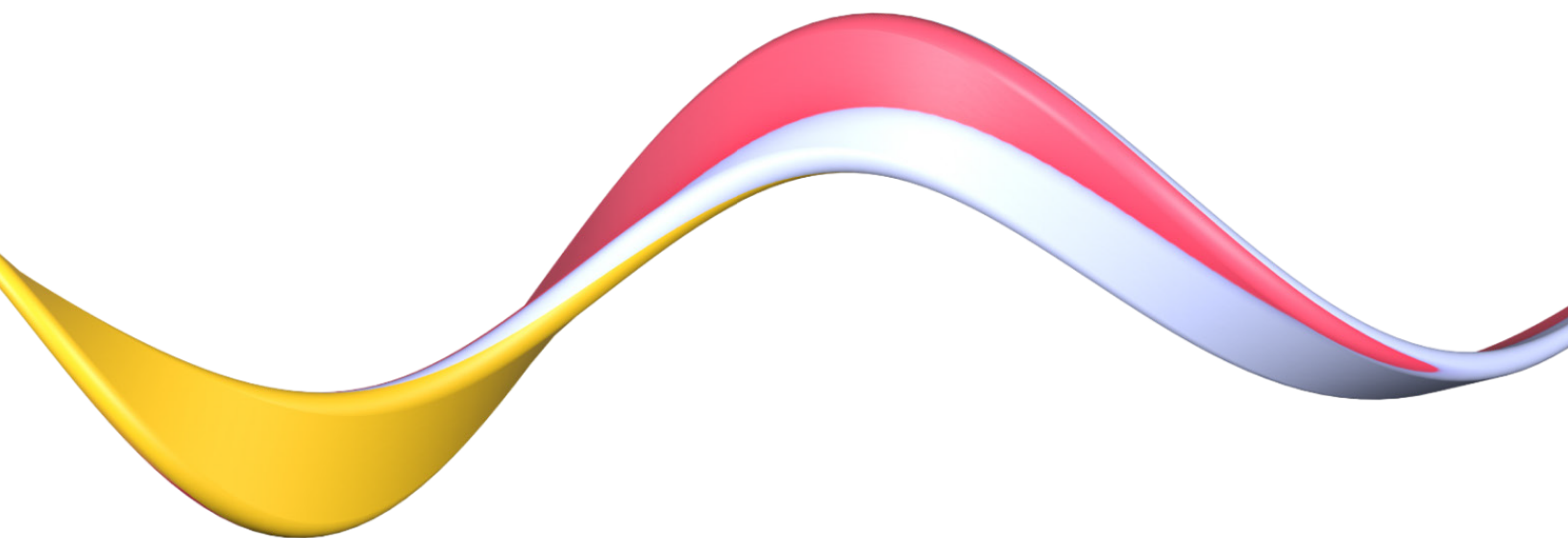
Ultimately, you want your agent to be in the center of the diagram: Your agent has the incident data, the customers' lifetime history and all the relevant internal policies and recommendations that can optimize that specific interaction in a personalized manner in order to, for example, prevent the next contact (proactively adding useful info), retain the customer before a real churn risk arises, upsell or cross-sell, push new features and product adoption, and much more. This is what adding value means, and it has ten times more impact on CX versus the mere resolution of an incident.

To put it more specifically, here's an example of something that only a Day 3 agent can say:



SO HOW CAN YOU BRING YOUR TEAM TO THIS SWEET SPOT?

From the research that we did, it seems like a lot of customer service teams have very robust policy and rule processes. When an agent wants to resolve a certain customer issue, they need to manually look up the knowledge base, search through previous communications with their manager, and try hard to memorize. From the manager's perspective, whenever they create or update a policy, they usually hold a daily stand-up, communicate via Slack and other channels, hoping that everyone will get the memo (and will actually act upon it during the interaction). It doesn't have to be that way in 2022. With Interai, every CS leader can create, broadcast and monitor rules, policies, offers (retention, upselling), promotions, etc., and have those displayed to the right agent at the right time in the right context.



Moving from manual, retrospect analysis to automated

real-time insights:

Though this is probably the biggest cliché, it is true: you need to be more data-driven in order to test and improve quickly and constantly. Unfortunately, nowadays companies rely solely on retrospect QA when it comes to verifying that their agents comply with company policies and follow the highest CX standards. This is because agents must manually look up or remember the right Course of Action, and to do so, they need to travel across multiple screens and systems in a way that is just not trackable. With Interai, the optimal and personalized Course of Action and all relevant info are automatically surfaced to the agent at the right time in the right context, and both the display itself and the agent's acknowledgment are tracked in real-time and can be seen in the Manager Dashboard. Moreover, companies can link Interai with their CSAT tool or any other metric to track the impact, performance and effectiveness of rules, policies, and offers on their core KPIs. This way, companies gain critical visibility they can leverage for learning and improving.



MOVING FORWARD TO DAY 3 CUSTOMER EXPERIENCE WITH 10 STEPS CHECKLIST

Now that you've fully understood where your org is positioned, go through the following checklist to get to Day 3.

SYSTEMS	Map your systems - understand if you can migrate or consolidate them, and which resources or tools you can use to do so. We suggest doing this with your development team. If it's not an option, you can check our solution that requires no dev team.	
	Map the types of customer data you have in your admin and back-office systems (which system contains which data)	
	Consolidate all your admin and back-office systems into one place, see this .	
TEAM	Map your Customer Service organization by tenure and skill (agent tiers and field of expertise)	
	Use the one consolidated view of the customer from all back-office systems to qualify all your agents to handle any type of service ticket, thus creating a truly consistent CX.	
KPIS	Review all your current KPIs - Are they all relevant? Actionable? Trackable? Do your KPIs serve your high-level, strategic focus – service quality, CX/CSAT, efficiency, etc.	

KPIS	<p>Add “Day 3” priorities to your KPIs: Growth & Scale</p> <ul style="list-style-type: none"> • Grow customer base - remove any onboarding friction • Increase revenue – prevent churn and increase utilization of the account by education, adopting product features • Delightful experience - to encourage word-of-mouth as a growth engine • Build for Scale: Remove inefficiencies - use agents time effectively on value-add tasks to grow sustainably 	
OPERA-TIONAL	<p>Segment your customers and create personalized rules and regulations, as well as retention and upsell / cross-sell offers that are tailored to the specific customer profile</p> <ul style="list-style-type: none"> • Segment your customers by lifetime value / score / status / priority / spend / time with the company (new vs returning) • Build a rule playbook (“if this - then that”) that will support your new KPIs of growth & scale (for example: if customer uses product A and product B, then offer them product C for 50% discount) • Broadcast and monitor these rules to your entire service team. Deliver the relevant policies to the relevant agent at the right time. 	

**To learn more about how to
implement this checklist**

CLICK HERE →

HERE'S HOW INTERAI WORKS



CUSTOMERS TALK ABOUT INTERAI

"Interai has changed the way we work in the most fundamental way we could imagine. We are no longer limited by our back-office systems and can serve more clients without hiring additional agents."

ARIK ZITIAT
OPS DIRECTOR, SIXT RENT-A-CAR