



INSIGHT REPORT

Unlocking Customer Insights from Contact Centers

FROM AGENT PRODUCTIVITY TO ENTERPRISE INSIGHTS

By **Jen Rodstrom**, CCXP
XM Catalyst

Bruce Temkin, CCXP
Head of the Qualtrics XM Institute

July 2015

EXECUTIVE SUMMARY

Companies have traditionally viewed their contact centers as cost centers and have consequently focused most of their energy on making agents as efficient as possible. However, companies are now beginning to realize that contact centers actually contain a wealth of deep, untapped information about customers. Temkin Group recommends that companies tap into this rich vein of information by shifting their focus away from agent productivity and towards enterprise intelligence. To construct a more holistic picture of their customers' experiences, companies should take the unsolicited, unstructured voice of the customer (VoC) feedback they capture in the contact center and combine it with data they collect from other sources, such as CRM and digital analytics. In this report, we outline how companies' efforts should shift across each of the Six D's of a VOC program: Detect, Disseminate, Diagnose, Discuss, Design, and Deploy. To start the transformation away from agent productivity and towards enterprise intelligence, companies need to focus on data integration, analyzing the entire customer journey, forming a cohesive governance structure, and developing new roles and skills for employees.

CONTACT CENTERS ARE UNTAPPED GOLDMINES OF CUSTOMER INSIGHTS

Contact centers contain a vast wealth of customer insights. In many cases, they're the richest source of untapped customer knowledge in the entire company. Unfortunately, companies tend to waste most of the value from these potential insights. Why? Because contact centers:

- **Handle many moments of truth.** Contact centers capture information from across all areas of the customer experience, such as purchasing, technical support, billing, and cancellation. These moments of truth are not always about the contact center experience; rather, they cut across many channels, from retail to Website and account management to sales.
- **Focus on quality and operational metrics.** Traditionally contact centers have mostly used customer input to ensure that phone agents meet expected quality standards, measuring a representative's politeness, responsiveness, knowledge, etc. Contact centers also measure metrics like hold times, length of call, and first call resolution, to name but a few. By solely focusing on agent productivity companies miss out on the qualitative insights supplied by customers.
- **Have multiple data troughs.** The wide array of internal systems makes the task of extracting data, deciphering it, and distributing it to the appropriate people difficult at best. The mix of ticketing systems, CRM, text or speech analytics tools, VOC tools, POS data, and other internal systems makes integrating data across sources extremely challenging.
- **Tend to resist change.** Since most companies view contact centers as cost centers, they usually task their leaders with eliminating as much cost as possible. As a result

of this environment, contact centers tend to be resistant to recommended changes from other parts of the organization as such recommendations often add incremental costs

SHIFT FROM AGENT PRODUCTIVITY TO ENTERPRISE INSIGHTS

While productive agents are important, companies can extract a lot more value from customer insights beyond just using it for training and incenting agents. How can organizations unlock the power of customer insights in the contact center? By shifting their focus from agent productivity to enterprise insights (see Figure 1).

To understand how to extract enterprise insights effectively from the contact center, Temkin Group interviewed 20 customer insight practitioners and vendors.¹ We found that for companies to achieve enterprise intelligence, they must make changes across every aspect of their voice of the customer programs based on what we call the “Six D’s of a VoC program” (see Figure 2). To help companies make the changes necessary, we identified best and emerging practices in extracting contact center insights across each of the Six D’s (see Figure 3):

- **Detect.** Capture insights from across the entire customer journey.
- **Disseminate.** Create real-time alerts and dashboards.
- **Diagnose.** Combine contact center feedback with other data sources.
- **Discuss.** Include contact centers in cross-functional meetings.
- **Design and Deploy.** Create customer-centric, optimized experiences.

Detect: Capture Insights from Across the Entire Customer Journey

Rather than focusing solely on contact-specific feedback, contact centers should recognize that they are in a unique position to improve their companies as they hear about interactions that span the entire business (see Figure 4). In order to capture actionable insights during customer interactions, call centers should:

- **Measure the product experience.** When Fiserv launched a new product from an acquired company, it received a lot of customer feedback claiming the product was not intuitive. Using speech analytics, the company measured how frequently customers raised the issue—in this case in about 100 calls per day—which enabled them to make this issue a priority and address it right away.
- **Uncover pain points across channels.** Verizon used text analytics in the contact center to discover that customers swapping out their non-functioning set top boxes drove a spike in calls for non-payment terminations. When customers experience a problem with their FIOS device, Verizon sends a new set top box, and the customer returns the broken one. If the warehouse does not receive the broken unit in a set

¹ For this report, we interviewed several companies, including: 24[7], Activision, Advent, Barclaycard US, Clarabridge, Convergys, Expedia, Fiserv, ICMI, InMoment, Nexidia, NextIT, NICE, Parature, Qualtrics, ResponseTek, SmartAction, Verint, Verizon, and Wells Fargo.

amount of time, the customer is charged for the unit. In this case, problems arose because the warehouse had a backlog of returns, which in turn led to the surge in customers calling to dispute the fact that Verizon was cancelling their accounts for non-payment.

- **Teach agents to probe for broader issues.** Advent trains its support agents to recognize when another product or service the company offers may help solve a customer problem. The company teaches its agents to ask questions not just about the problem the client is trying to solve, but also about any underlying business issues. If the agents identify a deeper problem, they then work with the customer to coordinate a follow up from the sales team who can delve more deeply into the customer's needs to identify the right cross-sell or up-sell solution.
- **Understand reasons for call transfers.** A line of business at Aetna used speech analytics to categorize and prioritize the reasons phone representative transferred customer calls, something customers found very frustrating. The insurer found that these calls primarily related to claim billing questions and inquiries. As a result, Aetna changed the process for handling billing inquiries and improved phone agent training to better identify the types of calls that may require a transfer to a supervisor.²

Disseminate: Create Real-Time Alerts and Dashboards

The rise of customer insight and action (CIA) platforms, along with improvements in speech and text analytics, enables companies to distribute contact center insights quickly across the broader organization.³ Companies can use these new capabilities to (see Figure 5):

- **Share daily customer calls.** One credit card provider set up a daily call program that shares the voice of the customer directly with key employees each morning. The company forwards one service call every day to nearly 1,500 employees so they can each individually hear about the issues and pain-points driving customers to the contact center. The company's goal is to have as many people as possible hear the calls in order to raise employees' awareness about how everyone at the company impacts the customer experience.
- **Communicate insights internally and to partners.** Activision captures customer insights through its Voice of the Gamer (VoG) program, which takes customer feedback from social media, self-service, live chat, and phone conversations and consolidates it into a single platform. The company then uses alerts and dashboards to distribute these VoG findings across the service organization in real time. Activision's analytics team identifies trends in this Gamer feedback and makes suggestions for improvements, often using verbatim analysis to support their suggestions. The company incorporates these VoG insights into daily reports about

² See the Temkin Group report, "Lessons in CX Excellence, 2015" (January 2015).

³ In 2010, Temkin Group determined that the label "Enterprise Feedback Management (EFM)" did not adequately describe the important group of technologies currently being used for voice of the customer programs. Instead, Temkin Group called this class of applications "Customer Insight and Action (CIA) Platforms," which it defined as, "A technology for automating multi-channel customer feedback, analysis, and response and the related workflow associated with closed-loop voice of the customer programs." See the blog post on Customer Experience Matters® blog, "Customer Insight and Action (CIA) Platforms Emerge" (September 20, 2010).

product launches and into weekly and monthly reviews distributed to its key partners, studios and publishers.

- **Create tailored dashboards.** The Results Companies introduced a speech analytics tool that translates call center interactions into insights and analysis that help the company continuously improve the customer experience. On the back end, the speech analytics tool captures and analyzes customer conversations, while on the front end; the company transforms insights from the tool into personalized, intuitive dashboards based on user type (e.g. associate, supervisor, manager, etc.). These dashboards display data visualizations of performance comparisons and trending information. Such visibility allows for a near real-time view of which agents are performing best and where opportunities for improvement exist.⁴
- **Include insights from contact center employees.** To aggregate and share customer insights, Advent created quarterly product dashboards that integrated listening posts, case demographics, and common issues by product. This dashboard included current themes supplied by contact center employees as well as client quotes culled directly from contact center interactions.

Diagnose: Combine Contact Center Insights with Other Data Sources

While analyzing surveys and listening to a handful of calls can uncover a drop in scores or a spike in cancellations, it does not always identify why this change is happening. Linking customer feedback to Customer Relationship Management (CRM), product usage, and behavioral data provides a more complete picture of the customer journey and experience. Tying what customers say to what they do leads to powerful predictive capabilities, and to achieve these capabilities, companies should:

- **Identify at-risk customers.** A B2B credit card processing company knew how expensive it was to lose an account so wanted to proactively identify at-risk customers before they left. To create a predictive model, the company brought in quantitative CRM data as well as unstructured contact center comments from cancelled customers. When the company applied speech analytics to these unstructured comments, it learned that the cancelled accounts had used phrases such as “look at statement,” “compare fees,” and “this is ridiculous” during their calls to the contact center. Now that the company knows which phrases to look for, it uses them as risk indicators for all new incoming calls, proactively reaching out to its most high-value customers who are at risk based on the terms mentioned in their conversation, which allows the company to catch them before they reached the point of churning. Its ability to recognize these customers saved more than 4,500 at-risk accounts in the first year, which translated to saved revenue of over \$12 million.
- **Use text mining to understand satisfaction scores.** A leading Cable/Satellite Provider wanted to understand why its CSAT scores were dropping. To do this, the company used text mining on calls with lower satisfaction scores to identify the top areas of dissatisfaction. The company discovered that customers frequently cited “inaccurate bills” as an issue, which it validated by listening to 100 randomly selected calls in which many customers described how the company’s rebate process caused unexpected, inflated bills. Thanks to text mining, the company realized that its

⁴ See the Temkin Group report, “Lessons in CX Excellence, 2015” (January 2015).

customers did not understand that they needed their rebate processed prior to installation, so it made a simple change in the rebate process. This change not only improved the experience, but it also saved the company money (see Figure 6).

- **Bring speech analytics into root cause analysis.** The Results Companies has a Customer Advocacy Group (CAG) responsible for analyzing the drivers behind the scores of their post-service surveys. As part of its analysis, the CAG team reviews the recorded interactions and account notes for every customer who gives a low survey score. This deep dive information informs the Call Back Process, which has a twofold purpose: first, resolve the customer issue, and second, gather more feedback for the root cause analysis. The CAG team then aggregates the data from the Call Back Process weekly, monthly, and year-to-date both to identify the longer-term trends driving customer satisfaction and to drive quality and operational process improvements.⁵
- **Predict likelihood of churning.** A large telecom provider proactively identified which customers were likely to cancel based on their chat interactions. The company built a predictive model by using text analytics to categorize customer and agent comments and sentiment during the chat. The company first identified 200 different categories—13 of which it used in the model—and then isolated the areas that made customers three times more likely to churn. These three areas were rescheduling, shipping issues, and agent transfers.

Discuss: Include Contact Centers in Cross-Functional Meetings

Customer interactions with a company are rarely limited to one internal team; rather, interactions usually span multiple departments and organizations. So while one team may be ultimately responsible for a customer touchpoint, inputs from different departments are necessary for improving the overall customer experience (see Figure 7). To effectively include contact center representation in customer experience discussions and action planning, companies should:

- **Establish clear ground rules.** The CX team at Fiserv sponsors a meeting every other week with a cross-functional team to listen to customer calls, discuss the status of current initiatives, and devise and assign improvement plans. To make each of these meetings successful, the CX team has created a repeatable process with steps like frame the meetings as a discussion, target relevant participants, reach out to participants prior to each meeting, allow sufficient meeting time, and rotate hosting duties (see Figure 8).
- **Coordinate resources across disparate sites.** One credit card provider has been expanding its contact centers, but still wants to make sure that they all stay in sync to effectively share insights and prioritize customer experience projects. To keep them all on the same page, the company created a program where all of the contact center leadership participate in a twice-per-month call to share what they are hearing and seeing at their site. These calls include front-line managers, department managers, and agents. This program helps participants understand resource allocation and

⁵ See the Temkin Group report, "Lessons in CX Excellence, 2015" (January 2015).

allows them to be more scientific in creating business cases for key improvement projects.

- **Implement a CX Ambassador program.** Nicor National created a CX Ambassadors program consisting of peer-selected call center representatives. These Ambassadors review customer and employee feedback, work closely with the leadership team to identify and prioritize issues that impact both the call center and customers, and make recommendations for improvements. Nicor National's Ambassadors also serve as liaisons between the company and its employees to keep employees up-to-date on current issues and solutions to address them.⁶
- **Have executives hear directly from customers.** After experiencing significant customer service challenges, Advent successfully created a dialogue between its executives and unhappy customers. The CX team contacted customers after their problem had been resolved, apologized for the issue in the first place, and then invited customers to share their stories during conference calls with Advent's executives. This proved to be a powerful tool for bringing serious service issues to the attention of Advent executives and helped drive change and accountability throughout the company.

Design and Deploy: Create Customer-Centric, Optimized Experiences

As companies are able to better understand customers from analyzing contact center interactions and the customers' overall journeys, they will find more opportunities to improve customer experience. To take advantage of this knowledge, companies need to (see Figure 9):

- **Customize rep training to optimize customer experience.** After analyzing contact center agent performance and its impact on customer experience, Magyar Telekom, part of Deutsche Telekom AG, realized that a small number of agents drove lower customer satisfaction. Rather than investing in an expensive, large-scale training, they launched a "micro-training" targeted at the 20% of lowest performing agents who had the largest negative impact on customer experience metrics. Magyar Telekom assigned an extra budget for this micro-training as the company was convinced it was the most efficient way to train the low performers, and ultimately, it did have more of an impact on customer experience than if they had simply retrained everyone.
- **Eliminate drivers of negative emotion before they occur.** A large financial services company used speech analytics to identify emotional call failures that generated multiple repeat calls. Customers who had mistakenly paid their bill twice needed to contact the company for reimbursement, which they found frustrating. To eliminate this negative experience, the firm introduced a system across the phone and Web that could warn customers if they had already paid their bill before making a potential double payment. This new system not only built loyalty and trust, but it was also ten times cheaper than handling the long and emotional repeated calls in double payment instances.
- **Target the right training for contact center representatives.** Verizon contact centers have performance metrics focused on key front-line employee skills, including

⁶ See the Temkin Group report, "The Five I's of Employee Engagement" (November 2012).

knowledge, issue resolution, and professionalism. The company discovered that their definition of “knowledgeable” differed significantly from its customers’ definition. Prior to uncovering this disconnect, Verizon’s training had focused on traits it viewed as knowledgeable, like understanding features, knowing upload speeds, and familiarity with the user manual. These insights from the contact center clarified that from the customers’ point of view, “knowledgeable” instead referred to patience and a willingness to explain things in more than one way and more than one time. As a result, Verizon redesigned employee training to concentrate more on soft skills, such as listening, rather than focusing on increased technical mastery of their products and services.

- **Personalize the contact center experience.** Activision uses its ability to track its gamers to personalize the support experience for its most active and influential gamers, known as “Clan Leaders.” Support agents address Clan Leaders as “Commander” and can fluently discuss these gamers’ recent gaming successes during the support interaction. Agents can also offer additional support options to this valuable segment. Anecdotal survey feedback shows that these high-value gamers report increased satisfaction with the contact center experience and that they appreciate the extra attention.

THE PATH FROM AGENT EFFECTIVENESS TO ENTERPRISE INTELLIGENCE

Companies should immediately begin identifying ways to extract enterprise insights from their contact centers. To start the process, we recommend that you begin to (see Figure 10):

- **Integrate data for deeper insights.** In the early stages of contact center data integration, you should begin linking together data you have readily available; for example, combining transactional surveys with call center data (e.g. time on hold, agent tenure, number of transfers). As you start to develop more robust capabilities in data integration, shift into applying speech or text analytics to unstructured phone and chat feedback to supplement the more common contact center data. And finally, you should bring in CRM data, digital paths, and other behavioral data to build a more complete picture of the customer.
- **Shift analytics to journey-centric insights.** Contact centers must evolve from measuring tactical goals, like agent performance, to using analytics that support strategic business goals. To ensure a relevant, personalized customer experience, you ultimately need a view into customers’ channel experiences before they ever reach the contact center. Consequently, metrics like first call resolution lose their value once companies can identify which interactions the customer tried prior to the contact center without success (e.g. self-service, IVR, in-store). By bringing together the customers’ digital path, their contact center history, and unstructured feedback, you can begin to create predictive models that predict what a customer needs next, rather than just solving the problem at hand.
- **Create a cohesive governance structure.** As you start to evolve contact center insights into enterprise intelligence, you must have clear leadership to guide this process. While initially you may have fragmented governance as contact centers and CX organizations work in parallel without interacting with each other, once you move

on to the intermediate steps, leaders from both teams should start to meet regularly to share findings and identify opportunities to work together on business cases that benefit both teams, such as technology investments (see Figure 11). At the most mature level, there should be a single executive overseeing both teams, or alternatively, alignment and collaboration between the executives that lead each organization.

- **Develop new employee roles and skills.** Traditionally contact centers have analysts who are well-versed in contact center efficiency and agent performance. While these skills are important for managing a call center environment, they are insufficient for true customer experience transformation. To take advantage of the enterprise intelligence coming out of the contact center, you need your employees to develop skills as research generalists, business consultants, compelling communicators, portfolio managers, and value creators (see Figure 12).⁷

⁷ See the Temkin Group report, "The Future of Customer Experience Insights" (December 2014).

Attributes of Contact Center Evolution from Agent Effectiveness to Enterprise Intelligence		
Attribute	Agent Effectiveness	Enterprise Intelligence
Primary goal	Call containment to minimize the impact of contact center as a cost center	Recognize contact centers as strategic data assets that function as business intelligence gathering and engagement centers
Transaction vs. journey	Measure customer experience based on a single call center transaction	Contact center interaction one step in the path of larger customer journey
Technology	Supports workforce management, agent performance and call center metrics	Provides deeper context for customer experience via speech and text analytics
Types of data	Transactional survey after contact center interaction that provides a quality metric (e.g. NPS, SAT, Effort)	Unsolicited, unstructured feedback that includes customer sentiment and can be aggregated to identify trending topics
Role of analytics	Performance-based metrics to guide compensation and training needs	Increased customer understanding through root analysis and predictive analytics
Type of segmentation	Based on internal silos including types of calls, tiers of agents and method of contact (e.g. chat vs. phone)	Based on customer traits including loyalty or satisfaction level and type of relationship (e.g. partner vs. customer)
Actions driven by insights	Support front-line training by identifying underperforming agents	Design better customer experiences by understanding why customers interact with call center
Predictive Analytics	Connect agents and customers based on personality traits	Personalize customer experience based on knowledge of customer intention

Qualtrics
XM institute™

Copyright © 2015, 2019 Qualtrics®

Figure 1

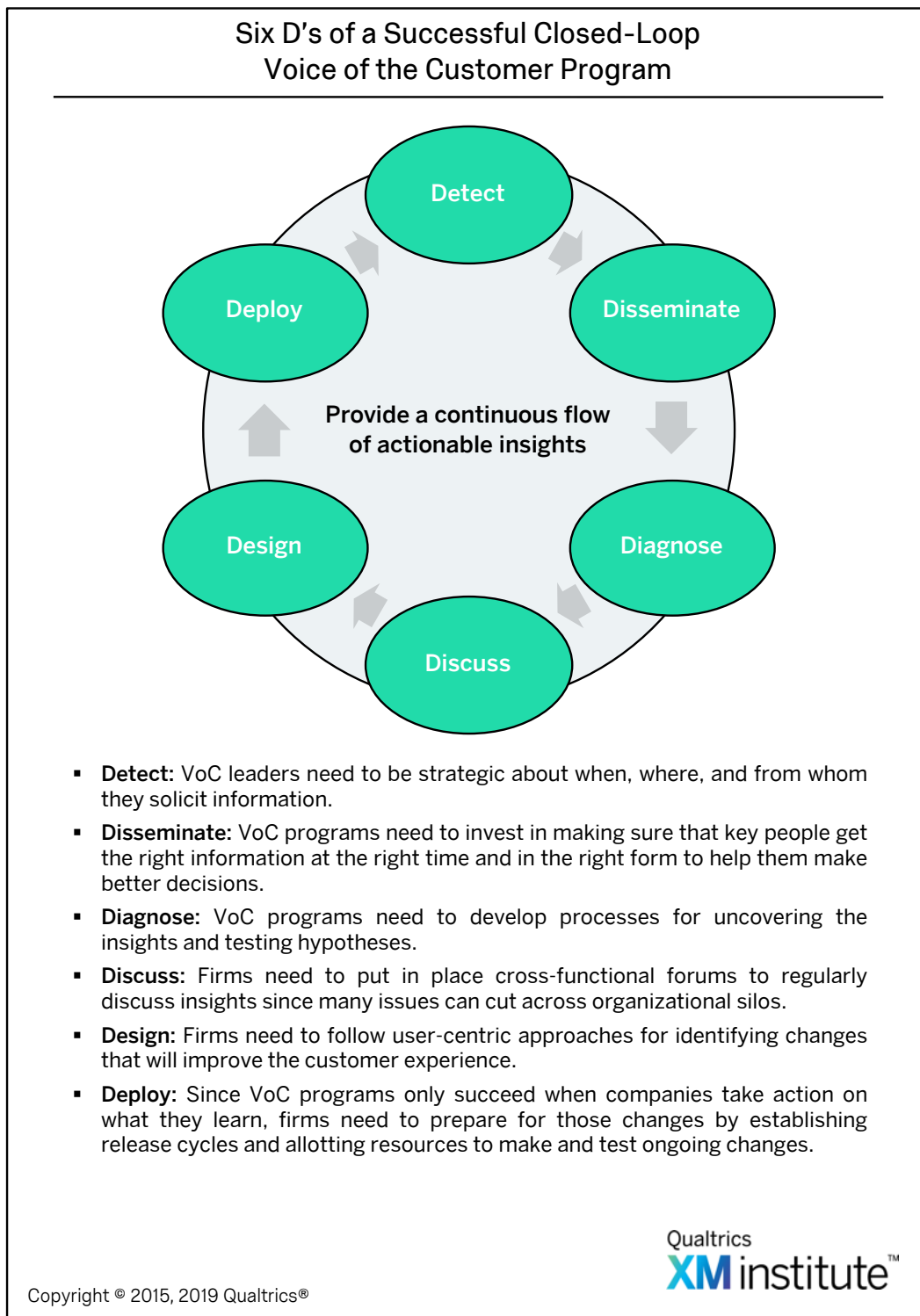


Figure 2

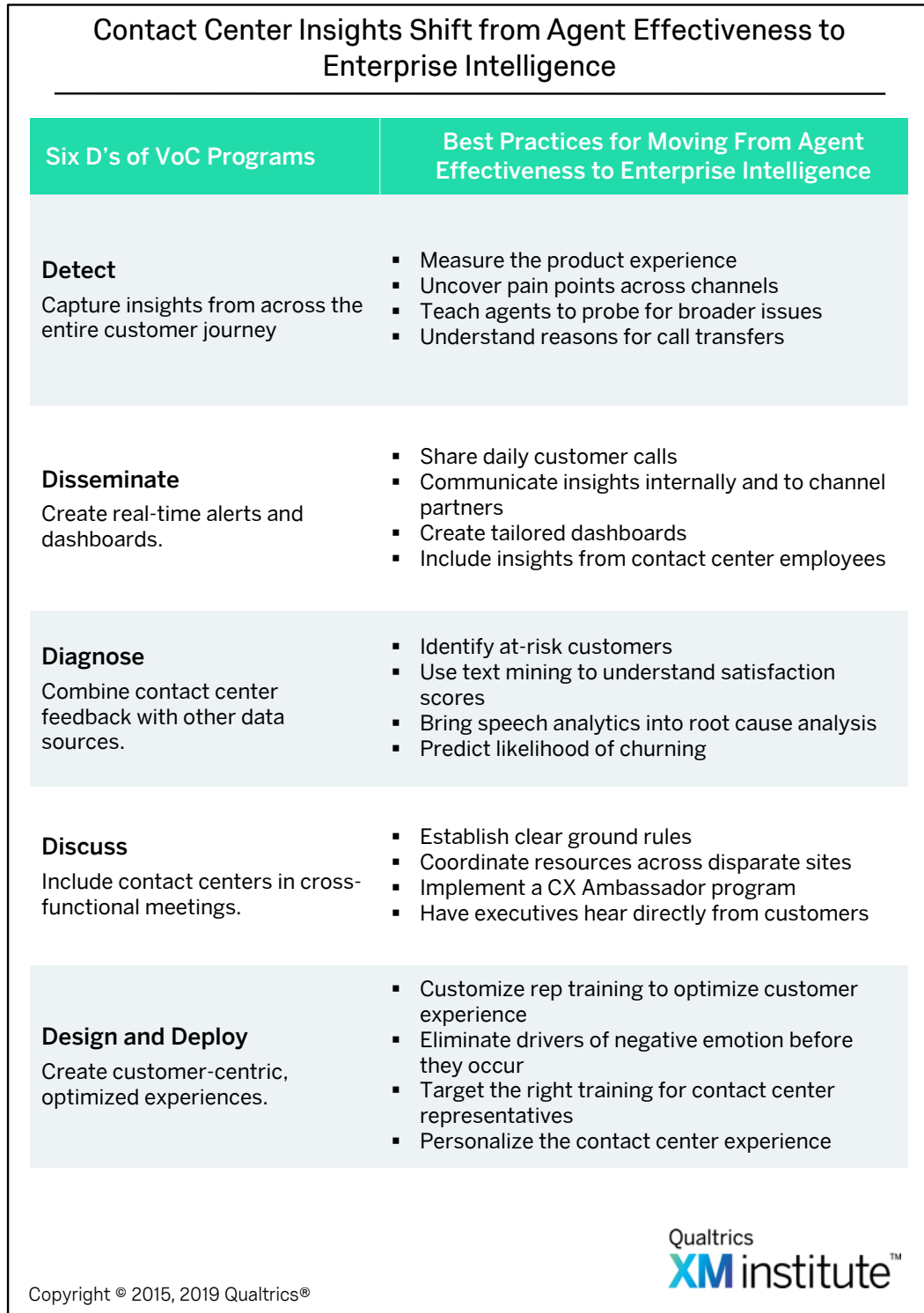


Figure 3

Strategically Capturing Insights in the Contact Center	
Type of Insight	Examples
Contact Center needs	<ul style="list-style-type: none"> ▪ Agent attitude, behaviors, knowledge ▪ Workforce management ▪ Immediate issue resolution ▪ Call containment
Marketing/messaging disconnects	<ul style="list-style-type: none"> ▪ Confusing language ▪ Erroneous information (price, phone number, hours) ▪ Challenges with promotions, rebates, refunds ▪ Brand inconsistencies
Channel discrepancies	<ul style="list-style-type: none"> ▪ Contradictions across retail, call center, digital ▪ Expectations set incorrectly ▪ Feedback for specific store, branch, dealership ▪ Self-service challenges
Competitive findings	<ul style="list-style-type: none"> ▪ Competitive benchmarking ▪ Who customers view as top competitors ▪ Where company is winning/losing ▪ Reaction to value proposition compared to others
Product experience	<ul style="list-style-type: none"> ▪ Subpar product performance ▪ Missing features ▪ Confusing design ▪ Misleading error messages
Partner and 3rd party service feedback	<ul style="list-style-type: none"> ▪ Not meeting customer expectations ▪ Installers, delivery service contractors not following company practices ▪ Providing inaccurate information ▪ Not fulfilling brand values

Copyright © 2015, 2019 Qualtrics®



Figure 4

Methods For Sharing Contact Center Insights		
Dissemination Method	Benefit	Challenges
<p>Alerts A tool for routing positive and negative feedback to the appropriate internal contact to take action</p>	<ul style="list-style-type: none"> Automate routing Engage appropriate stakeholder or contact center agent Real-time Close loop with customer 	<ul style="list-style-type: none"> No aggregation Not broadly shared Time-consuming if manual Less effective if delayed
<p>Customized reports Typically PowerPoint, a combination of charts, graphs, and tables tailored to highlight key findings for specific stakeholders</p>	<ul style="list-style-type: none"> Familiar format Share in-person or via email Easy to include customer verbatims, audio, or video clips 	<ul style="list-style-type: none"> Static Time-consuming to create Produced on a set schedule (quarterly, monthly)
<p>Dashboards An intuitive layout of key metrics that provides a high-level summary of insights aggregated from multiple data sources</p>	<ul style="list-style-type: none"> At-a-glance understanding Ability to drill down for detail Can program to automatically update with current data 	<ul style="list-style-type: none"> Requires expertise to create End users need training for proper interpretation Impersonal if lacking qualitative commentary or verbatims
<p>Portals A link to a site that provides access to a variety of information such as raw data, reports, summaries and dashboards</p>	<ul style="list-style-type: none"> Self-service All relevant materials in central location Accessible to as few or as many as desired Easily accessed via link 	<ul style="list-style-type: none"> Requires oversight, maintenance, and regular updates Needs to be well-publicized for usage Insights can be mis-used



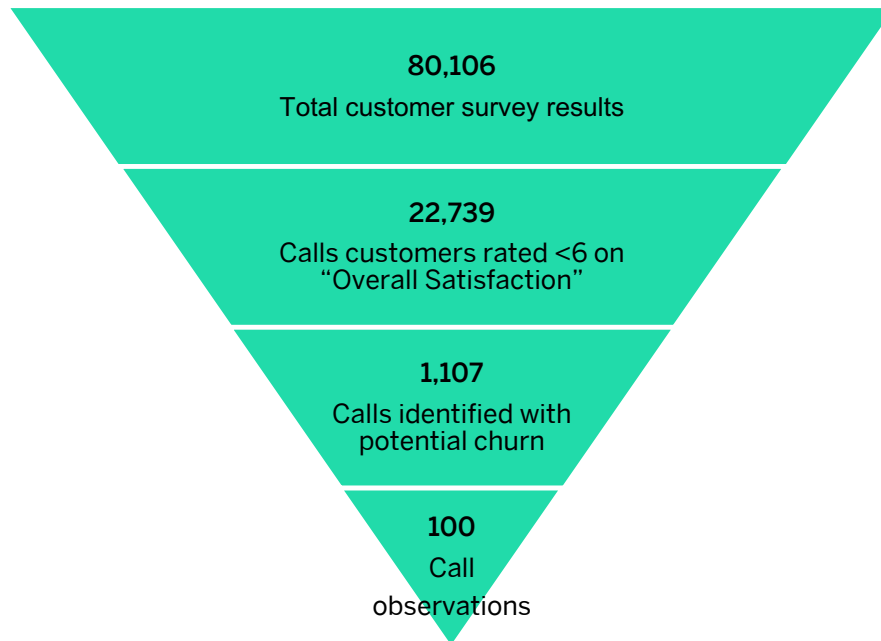
Copyright © 2015, 2019 Qualtrics®

Figure 5

Using Text Analytics to Understand Satisfaction Scores

Cable/Satellite Provider Upstream Process Causes Calls and Churn

Low CSAT scores showed correlation to billing complaints. Deep root cause analysis showed the rebate process was broken, causing higher-than-expected bills.



- Focus on calls with low customer satisfaction
- Categorize interactions by the stated area of dissatisfaction (19 categories)
- Focus on interactions where the subscriber is threatening to cancel their service due to billing/pricing, service, and/or product issues
- Observe a random sampling of targeted calls to uncover the root cause of dissatisfaction

Printed with permission from Convergys

Copyright © 2015, 2019 Qualtrics®

Qualtrics
XMinstitute™

Figure 6

Best Practices for Cross-Functional Reviews

Initiate regular cross-functional meetings to utilize contact center insights in driving action and accountability

<p>Why do we need a cross-functional team?</p>	<p>Regular discussions about customer feedback among cross-functional leaders lead to better customer experiences because, like the experiences, the discussions cut across different areas of the business.</p>
<p>What will the team do?</p>	<p>Review insights, add context, help prioritize customer experience improvements, assign accountability for improvements, monitor progress and results from actions, and summarize activities for senior executives.</p>
<p>How will the team do it?</p>	<p>Meeting regularly, monthly or more frequently, the team will review VoC insights and make recommendations on what improvements the company should make to remedy issues. The team will also track and monitor actions until customer feedback demonstrates resolution.</p>
<p>Who will be on the team?</p>	<p>The team includes leaders from all major areas of the company, including departments that have no direct interaction with customers.</p>

Key Best Practices for Cross-Functional Teams:

1. **Set expectations.** Set clear expectations for each individual's responsibility as a member of the team.
2. **Include HR.** Make sure to include HR as many insights will relate to employee hiring, training, and compensation.
3. **Get executive sponsorship.** Each improvement should have an executive champion who reviews and signs off on the proposed solution and the final result.
4. **Discuss progress.** Each meeting should allow time to review the status of improvements in progress as well as the improvements that are complete but still measuring resolution.
5. **Update executives.** Report back to senior executives with the status of improvements underway, new improvements that are being worked on, and how completed improvements are being received by customers.



Copyright © 2015, 2019 Qualtrics®

Figure 7

Establishing A Successful Cross-Functional Call Listening & Action Planning Program	
Program Steps	Description
Frame as a discussion	<ul style="list-style-type: none"> ▪ CX prepares calls to be listened to during the meeting, but attendees expected to participate. ▪ Not a presentation; an interactive session
Target relevant participants	<ul style="list-style-type: none"> ▪ Need right level participant from right teams ▪ Make sure only those who need to be there are invited
Reach out to participants prior to each meeting	<ul style="list-style-type: none"> ▪ Remind participants about status updates and other deliverables they need to share ▪ Ensure attendees can make meeting or will send someone appropriate in their place
Allow sufficient meeting time	<ul style="list-style-type: none"> ▪ Begin by reviewing status updates and takeaways from previous meeting ▪ Enough time for call listening, discussion, action planning, ownership decisions ▪ End by identifying focus for next meeting and types of calls to review (e.g. product changes, types of interactions)
Rotate hosting duties	<ul style="list-style-type: none"> ▪ Create a shared schedule of hosting dates ▪ Allows participants to take ownership and actively engage ▪ Brings different voices and perspectives to leading the meeting

Qualtrics
XM institute™

Copyright © 2015, 2019 Qualtrics®

Figure 8

Create clear, consistent experiences that meet customer needs	
Key Experience Design Principles	Role of Contact Center Insights
Identify key moments	<ul style="list-style-type: none"> ▪ Use sentiment analysis on calls to identify strongly positive or negative experiences ▪ Track volumes for another layer of insight ▪ Combine contact center insights with customer journey mapping and other VoC data to validate ▪ Apply good design principles to those moments
Plan to test and iterate	<ul style="list-style-type: none"> ▪ Pilot design change with a subset of customers ▪ Train a smaller, dedicated group of agents to respond to calls from these customers ▪ Utilize voice of the employee and speech analytics to understand customer experience ▪ Iterate design changes as needed
Set effort and emotional goals	<ul style="list-style-type: none"> ▪ Meeting functional requirements is no longer sufficient ▪ Use speech or text analytics to measure sentiment and to trend key phrases that describe “ease of use” ▪ Utilize customer behavior data to understand the customer’s path to the contact center ▪ Design for positive, intuitive experiences
Find the little things	<ul style="list-style-type: none"> ▪ Identify the minor annoyances that could be improved ▪ Front-line employees well suited to provide insights ▪ This type of improvement does not require dramatic changes ▪ Can be accomplished with minimal investment
Minimize “Band-Aid” solutions	<ul style="list-style-type: none"> ▪ Employ customer insights to frame the problem appropriately ▪ Use design-thinking principles regardless of the type of experience (e.g. billing process, service enhancement, Website messaging) ▪ Take the time to craft the right solution



Copyright © 2015, 2019 Qualtrics®

Figure 9

Evolution of Contact Center Insights			
Evolution	Early Stages	Intermediate Steps	Enterprise Intelligence
Integration	<ul style="list-style-type: none"> Post-service survey scores with open-end feedback Call center meta data (time on hold, transfers, agent tenure) 	<ul style="list-style-type: none"> Speech and/or text analytics categories and sentiment CRM data usage and behavioral data 	<ul style="list-style-type: none"> Digital pathing and analytics Merging of omni-channel data Data brought into predictive models
Analytics	<ul style="list-style-type: none"> Find and act on problems with agent performance Identify peak periods and call types for workforce management Interpretation at a glance for contact center supervisors 	<ul style="list-style-type: none"> Open-end discovery with text analytics Eliminate post-service survey by utilizing speech analytics Track trending of key topic areas and ongoing sentiment 	<ul style="list-style-type: none"> Create predictive models using everything known about customer Identify and proactively reach out to at-risk targets Improve experiences in real time
Governance	<ul style="list-style-type: none"> Unclear who owns technology – CTO, Call Center VP, CX team Fragmented leadership - contact center and CX leaders separate 	<ul style="list-style-type: none"> Contact center and CX leaders meet regularly Beginning to build joint business cases Occasionally work together on CX reporting 	<ul style="list-style-type: none"> CX executive and contact center executive aligned on vision Collaboration across both teams CX Champions supported company-wide
Skills	<ul style="list-style-type: none"> Support traditional contact center goals Focus on workforce management, agent performance, and efficiency metrics 	<ul style="list-style-type: none"> Focus on extracting company-wide insights Able to interpret unstructured feedback Separate tracking from improvement programs 	<ul style="list-style-type: none"> Understand different customer journeys Analysts understand technology and statistics Business consultants identify priorities and drive change



Copyright © 2015, 2019 Qualtrics®

Figure 10

Two Models for Technology Adoption for Extracting Insights from Contact Centers		
Steps	Bottom Up	Top Down
Where it begins	<ul style="list-style-type: none"> ▪ Begins at grass roots level (e.g. retail store, contact center) 	<ul style="list-style-type: none"> ▪ Vice president or senior leader who “gets it” and wants experience to match brand
What it needs to succeed	<ul style="list-style-type: none"> ▪ Business case ▪ Funding ▪ Executive sponsorship 	<ul style="list-style-type: none"> ▪ Sufficient internal resources to implement ▪ Vendor as partner ▪ New analytic skill sets to manage
Why it works	<ul style="list-style-type: none"> ▪ Essentially is a pilot ▪ Able to prove in localized environment ▪ At a reasonable cost ▪ Show improvements to customer experience ▪ Leaders realize it is scalable 	<ul style="list-style-type: none"> ▪ Need executive buy-in for a higher priced solution that can't be piloted or purchased in pieces ▪ Leader can drive data integrations across different teams
Potential challenges	<ul style="list-style-type: none"> ▪ Some departments harder to convince without executive sponsorship 	<ul style="list-style-type: none"> ▪ Executive gets excited but isn't good at driving the idea down ▪ Lose sight of larger goal if executive does not stay actively involved

Qualtrics
XM institute™

Copyright © 2015, 2019 Qualtrics®

Figure 11

New Roles Required for Evolution of the Contact Center		
New Insights Roles	Description	New Skills Required
Research Generalists	Focus less on specialization and learn how to capture, integrate, and analyze data across a variety of sources	<ul style="list-style-type: none"> Understand interaction data (e.g., web and contact center data) Can use text and speech analytics tools and interpret results from the tools Skilled at synthesizing insights across sources Ability to uncover root causes
Business Consultants	Work closely with different parts of the organization to understand how insights can help them drive business improvements	<ul style="list-style-type: none"> Have a deep understanding of the organization and its insights needs Partner with product and service design groups Can identify moments of truth
Compelling Communicators	Weave insights together with customer stories to drive action across the company	<ul style="list-style-type: none"> Strong communication and collaboration skills Possess skills to translate insights into customer stories Skilled at connecting insights across interactions
Portfolio Managers	Reallocate their budgets to support the data sources and analytics that will drive the most value	<ul style="list-style-type: none"> Skilled at facilitating insights-based action planning conversations Have the skills and tools to create predictive models Understand internal goals and needs well enough to anticipate action items
Value Creators	Evaluate based on the value they create for their organizations, not the the completion of projects	<ul style="list-style-type: none"> Strong understanding of the industry in which the company operates Know how to effectively gather insights from employees Can uncover contextually meaningful, not just statistically significant insights



Copyright © 2015, 2019 Qualtrics®

Figure 12