

WHITEPAPER



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**THE CUSTOMER EXPERIENCE PLAYBOOK:  
PROVIDING UNMATCHED SERVICE  
IN TODAY'S MULTICHANNEL LANDSCAPE**  
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# THE CUSTOMER EXPERIENCE PLAYBOOK: PROVIDING UNMATCHED SERVICE IN TODAY'S MULTICHANNEL LANDSCAPE

Today's customer is [more empowered than ever before](#). Customers have more information, and it's easier to access that information. And yet, it's more challenging for customer service leaders to engage those customers through relevant and timely connections throughout the buyer's journey. Modern-day consumers can interact with a company in a variety of ways, and a uniform customer experience is expected at all of these checkpoints. More importantly, the company is expected to wow the customer at every conceivable interaction. No matter who the customer is connecting with — your sales reps, your field technicians or outsourced customer service — you must deliver one brand, one voice, one overall customer experience for success.

## Roadblocks to Success

Customer experience is where it's at in modern marketing. A Salesforce survey shows that [86 percent of senior marketers believe](#) that a cohesive, fully integrated buyer's journey is of the utmost importance. However, only 17 percent of companies have actually created this integrated model across all of their customer touchpoints. This disconnect is a major hurdle many companies still have to overcome.

### *Documenting Customer Interactions*

While this may seem basic, it's important that everyone across your organization agrees on your product and service offerings. Included in this is that everyone shares the same business benefits, timeline and pricing for your solutions with your customers and prospects.

A universal system for documenting customer interactions and making this information available to all of the company's touchpoints is essential for any company that takes the customer experience seriously. However, such a solution is much easier said than done.

### *Engaging Customers across Multiple Channels*

Once upon a time, customers had a preferred way of contacting a company, and they'd use this one avenue exclusively. Today's customer experience landscape is far different. Customer will email a company, interact with the company on social media, use online chat and place a call to the company, all within a short period of time. The customer expects every interaction to be similar to one another in terms of quality, and they expect that the information they've previously provided to your company is known by every representative they interact with. After all, it's the same company, right?

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As we all know, each of those touchpoints are handled by different people in different departments. Aligning all of those individuals seems like an impossible task. And yet, it's what the customer demands. It's a major challenge many companies have had difficulty in handling.

### ***Being Everywhere at All Times***

The days of customer service being open from 9 AM to 5 PM are long gone. According to the Social Habit, 42 percent of customers surveyed state that they expect an answer to their social media questions [within the hour](#). What's more, 57 percent of respondents state that this timeframe should apply to nights and weekends as well. In other words, people don't care what time it is. They want answers now.

This is obviously a major challenge for customer service departments in all industries. Having top-notch customer support available at all times is extremely challenging. But once again, the customer is always right. And if they expect speedy response times during off-peak hours, it's your duty to give it to them.

## **Training Agents in Customer Service**

It's not enough to simply have customer service representatives available to solve problems. Those people have to actually know what they're doing, and they have to possess the ability to represent the brand at a high level in all situations. And, as you now know, that representation must be executed quickly.

### ***Working across Departmental Branches***

Although consumers aren't as likely to reach out to companies via phone as they once were, everyone knows the pain of being transferred around from department to department in search of an answer. These transfers still happen in online customer service, but they must happen quickly and seamlessly. People don't want to buy from a company — or stay with a company — that can't seem to get its story straight. You must set up a cohesive way for your customer service reps to transfer cases to other departments, or at least to get answers from other areas when necessary.

### ***Partnering with Third-Party Vendors***

In order to ease the burden of 24/7 customer support, many companies contract with [third-party vendors](#). This means an outside company will handle the concerns and complaints of your customers so your company doesn't have to spend resources on an online chat rep working the graveyard shift. However, aligning your customer experience vision with your third-party vendors is crucial. Without a strong vision — and a plan to execute each step of a successful customer experience — your third-party vendors won't have the necessary tools they need to implement that vision.

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## THE PLAYBOOK: A STEP-BY-STEP GUIDE TO CREATING THE CUSTOMER SERVICE YOU WANT TO PROVIDE

### Identify Your Customer's Engagement Path

Although your customers have a seemingly endless number of ways to get in touch with you, the truth is there are definite trends within the underlying numbers. That is, people prefer a few specific approaches with your company that they might not utilize when contacting other organizations. Your job is to figure out the common paths taken by the majority of your customers, and then use that information to resolve the pain points of those customers at exactly the right time.

#### *Know Your Customers*

Most companies claim to understand their customers. But providing a true customer experience goes way beyond simply "getting" your customers. You have to know everything about them, from their motivations to their demographics to their preferred means of communication. It's only through obtaining this information that you can truly appeal to your customers as individuals — which, at the end of the day, is what they really want.

[Creating a buyer persona](#) is the best thing you can do in order to answer these questions. A buyer persona isn't so much a profile of your current customers as it is a thorough breakdown of the audience to which you want to market. Include gender information, demographics, income, tech savvy, industry of employment, and anything else that may be relevant to your specific niche. Most importantly, identify the challenges that are faced by your target audience, and consider how your solution fits into those pain points.

#### *How Customers Connect*

There's a reason why data plays such a prominent role in today's marketing — it works! The more you know about your customers, the better equipped you'll be to serve those individuals. That knowledge includes the [tendencies that lie beneath each interaction](#). Seek to understand how each customer interacts with you, specifically what platform they use and how frequently they use it. While this helps you on an individual level, it'll also help you to spot trends within certain groups of customers. Once you notice those trends, you'll be able to identify the most popular patterns that lead current and future customers to interact with your customer service representatives.

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### *Identifying Needs*

Knowing what makes your customers reach out to you is a great first step, but it doesn't complete the puzzle. The real key to the customer experience is to know what people want from you before they even have to ask. Remember, your solution only works if it reaches your customers at the right time. Understanding the buyer's journeys of the various segments of your audience will help you to engage customers at just the right time, giving them exactly what they want, when they want it. That's the kind of customer service that will have people raving to their friends and family, which will ultimately benefit your company.

## Creating a Road Map

In school, we were asked to take the concepts we learned and put them into our own words. Creating a [defined road map](#) of the customer's experience with your company is the same thing. If you really know what your customer experiences throughout their journey, it shouldn't be difficult to create. But if there are any holes in your strategy, creating this road map will highlight those issues, giving you the chance to quickly solve them.

### *Rethink the Customer Experience*

You may have initially had some preconceived notions about how customers interacted with your company. Now that you have tons of data about how customers actually do reach out to your organization, you can see real-life examples of how your customer service touchpoints impact your customers. Reach out to your third-party vendors for qualitative and quantitative analysis of customer interactions as well. The wealth of information they have available will give you greater insights into your customers' behavior and their motivation for contacting you.

By combining all relevant customer data, you will be able to see that some contact touchpoints are more popular than others, and you might see that there are branches of your customer service that are typically neglected. This is an opportunity for you to build on what works, while making some decisions about the areas of your process that fall short.

### *Distribute Your Playbook*

Once you've got your data-driven approach to the customer experience down pat, it's time to put your vision into action. Give your playbook to anyone who works with customers in any capacity. This is especially true of third-party vendors, who are typically the last to hear about anything new. On top of distributing your playbook, provide the proper training to all of your customer service departments. This will help ensure there's no confusion; additionally, it gives you the chance to gain feedback from your reps before they execute these strategies with actual customers.

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Providing hands-on training is also a great way to encourage your customer service staff to buy into the changes you've made. This is absolutely vital because if your staff-level employees don't take the playbook seriously, there's no chance that they'll use these strategies when dealing with customers.

Using these techniques will allow you to gain an even deeper insight into what makes your audience tick. As you learn more about your customers, update your playbook to reflect your enhanced knowledge. You can (and should) also update this playbook as you learn more about what strategies are most effective with your customers.

### ***Redefine Your KPI***

As you overhaul your approach to customer service, it makes sense that you'd also reconsider the metrics you use to determine successful customer support. Remember, it's not about the product — it's about [reaching the consumer](#) in a timely manner and helping to resolve their pain points. Incorporate metrics that reflect your ability to help people when they need it, such as minimizing the number of repeat customer contacts within a short period of time.

## **Testing the Customer Experience**

Vigilant testing is part of keeping any machine running. The customer experience is no different. Make sure all of your channels work efficiently, and that there is no difference in the quality of customer service between any of the various channels you utilize. Every device and every means of communication should have the exact same level of support, friendliness, and overall service expertise. Verify that each check-point is using current logos, color schemes and fonts. Any kink in the chain immediately becomes your weakest link, one that can cause you to lose out on business.

## **Revising Your Strategy**

Customer service has changed dramatically over the past five years, and it will continue to change for the foreseeable future. Stay on top of the paths your customers take to reach you, and constantly monitor your company's ability to predict the pain points of your customers. It's important to remember that these factors may change at any point. Continue to collect and monitor the data that lies beneath the solutions you provide, and don't be shy about making any changes that can help you to better serve your customers.

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## HOW COULD A THIRD-PARTY VENDOR LEND AN EXTRA HAND?

Third-party vendors can help you improve your company's customer experience. It's often easier for customer service executives to deal with vendors than it is to ask for a budget increase to hire new staff, and the insights and information they can provide you on the customer experience will help you put your resources to the best use.

With that in mind, working with a vendor is often an ideal solution for a company that's feeling stress on its customer support system. Here's what a third-party vendor can do to help you achieve customer success and convert your customers into loyal, brand advocates.

### ***Become an Extension of Your Brand***

The vendor's relationship with the company should only be apparent through the inner workings of that organization. In other words, the vendor's adaptation of your company's imagery and customer service philosophies should be so seamless that customers can't even tell they're working with an outside company. The experience a customer derives from interacting with your in-house staff should be identical to what they experience working with a vendor who's providing customer service for your company.

All too often, companies don't understand that a given vendor is a poor fit until it's too late. It's your job to make sure that you choose the right vendor the first time. Look for forward-thinking companies that place a [similar value](#) on the customer experience, particularly when it comes to customers receiving the same level of support at all touchpoints. You should also look for a vendor with a proven record of creativity when it comes to aligning itself with a company's look and vision. A vendor that can't jump right in line with your company's culture isn't a vendor you should consider working with.

### ***Flexible Help***

No vendor should provide a one-size-fits-all solution for companies who need their help. Not all customer service scenarios are created equally. For instance, the holidays are drastically busier than the early months of the calendar year for many companies. Your third-party vendor should understand that, and the vendor should have the ability to provide additional support during your busiest times.

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Of course, knowing when your busiest times are is your job. It's imperative you plan ahead for these instances. Let the vendor know you'll need this extra help before you sign anything. This protects your company against any surprises that might arise down the line as a result of miscommunications or assumptions.

### ***Additional Insights***

The fact that vendors work with other companies is often listed as a negative quality. The reality is vendors can actually be a major benefit for your company. Because the vendor has seen so many different types of customer service infrastructures, they have unique insight into the best ways to implement a top-notch customer experience. You may be able to learn some valuable pointers about how to get the most out of your new strategy, and you might even learn some new tactics that you can incorporate into your company's methodology.

Also your vendors often play big roles in customer-facing sections of your business. They listen to customer problems, they help them solve issues, they often know your products inside and out. Use their knowledge of your customers — and their pain points or concerns — to understand your customers better. The insight you can gain from third-party customer service vendors will allow you to see where your company is hitting the mark and where there could be improvements.

## **THE FIRST STEP TOWARD CREATING A SUCCESSFUL CUSTOMER EXPERIENCE**

In today's climate, it's insufficient to look at individual transactions or touchpoints for ways to improve your success with customers. Instead, the true path to customer experience is to consider all of these transactions and touchpoints as a whole. Developing a playbook for understanding and helping your customers is the first step to creating a truly comprehensive and effective approach to the customer experience. It'll keep your current customers coming back for more, and it'll help you convert new customers into brand advocates.



**About Us**






RDI Corporation was founded in 1978 and is headquartered in Blue Ash, Ohio. We provide precise business solutions through a fully integrated outsourcing model. Our clients range from mid-sized corporations to distinguished Fortune 500 companies.

Since 1978, RDI has been winning for clients every day, every call, every interaction — we'll show you a track record and game scores that prove it. RDI tailors programs and activities to fit perfectly with clients' needs, operations and expectations. We don't have rigid requirements or structures that prevent your program from success. The motto "Winning Smart" represents an unmatched combination of knowledge and passion you will notice in every member of our team.

RDI Corporation consists of four distinct divisions closely integrated to cover the spectrum of customer service and sales, market research, digital strategy and design and technical support. Our organization consists of responsive, experienced professionals from a broad range of backgrounds, all commonly bonded by the spirit of winning.

RDI functions as the service provider for many discerning Fortune 500 companies. We earn the respect and trust of each client by vigorously evaluating and optimizing the work we carry out for them. We adapt our work when complications arise and resolve issues proactively. RDI does what others strive for: high value service in a cost contained environment.

**Have additional questions or comments?  
We'd love to hear from you!**

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**Additional Resources:**

[The Ultimate Guide to Creating New Revenue Streams](#)

[Doing the Right Thing: Leadership Defined](#)

[4 Steps to Legendary Customer Service](#)

[Learn About Our Pilot Program](#)