

PRAISE FOR *LEADING THE CUSTOMER EXPERIENCE*

“Sooner or later, every successful business realizes that customer experience is the experience that really matters. Brad’s book lays out the road map for any leader who wants to make a difference for the customers they serve.”

Seth Godin, author of *This Is Marketing*

“Brad’s new book is perfect for new leaders as well as veterans who want to be sure they’re current on best practices. The book is an easy read and provides tons of new ideas for packaging and delivering the Voice of the Customer upward, and the nature of the customer’s needs and journey to the front line. I came away with five new ideas I can apply with my clients tomorrow.”

John Goodman, author of *Customer Experience 3.0*

“I will use *Leading the Customer Experience* as a textbook for my teams by assigning reading, crafting study questions, then facilitating discussions on the assignments. It will allow us to further our goals of improving knowledge, enhancing the team dynamics and finding actionable strategies to incorporate into our business practices. The book is a low-cost, high-yield, must-have addition to any customer experience professional’s library.”

Debra Bentson, Senior Workforce Management Manager, Kaiser Permanente

“There are many books about the customer experience, but few as good as this one. Written by an accomplished practitioner with a depth of expertise, you’ll learn everything you need to lead the customer experience if you read it and apply the lessons. Highly recommended.”

Mark Sanborn, President, Sanborn & Associates, Inc.; author of *The Fred Factor* and *You Don’t Need a Title to Be a Leader*

“*Leading the Customer Experience* is exactly what it says it is—a book designed for leaders focused on their companies’ customer experience. If you’re trying to figure out how to get your own company’s CX efforts under way and operating on all cylinders, you’ll find this book to be a very practical, organized and helpful tool. Use it!”

Don Peppers, author of *Customer Experience: What, How and Why Now*

“Brad is an industry expert and amazing at breaking down the keys to successful customer engagement, retention and expansion. He establishes a clear pathway towards effective customer experience that can be exercised at every stage of a company’s maturation.”

Hasan Ali, Founder and CEO, Air Tutors

“In this new book, Brad Cleveland provides insightful and powerful knowledge in a very clear format. I recommend it for students and experienced professionals.”

Professor KJ Cheong, Chairman, CIRC, Korea

“Our city is going through an explosive growth period as many people look for the small town, outdoor recreational experience. It could be easy to lose focus on our customers: our citizens, visitors and business owners. Brad’s book comes just in time to reemphasize our dedication to the customer experience. It will be a valuable tool in thinking about and implementing our strategic planning, our organizational structure and our continual evaluation of success.”

Peter Hendricks, Mayor, Sun Valley, Idaho

“Brad’s book is the work of an experienced and trusted consultant who clearly knows how to explore the many facets of customer experience. I enjoyed the case studies and many key recommendations in this well-crafted instructional manual accessible to all levels of professionals. The structure of ideas and approach of implementation are creating a thread of continuity that keeps you focused on strategic CX objectives. It’s also a great source of immediate takeaways.”

**Pierre Marc Jasmin, MBA, Co-founder, Services Triad;
Board, SOCAP Canada Chapter**

“Brad applied his vast, multi-industry experience and expertise to the intimately connected and burgeoning realm of customer experience. Today, the stakes for any company looking to survive, compete and grow in an ever-increasing customer expectations environment are higher than ever. By devouring and applying the concepts, strategies and tactics meticulously outlined in *Leading the Customer Experience*, CX leaders have a fighting chance of coming out on top.”

Dominick J Keenaghan, President, INSIGHTS Middle East, Dubai

“You know customer experience is important, but where do you start? Brad Cleveland answers that question in *Leading the Customer Experience*. The book is an essential guide to the broad steps needed to lead a successful customer experience initiative.”

Jeff Toister, CPLP, PHR, Toister Performance Solutions, Inc.

“In this time of significant change, this book can help you and your team chart a successful course to the future. Everyone has a role in delivering a great customer experience, and it makes relevant principles clear, and easy to understand and apply.”

Anna Toikka, Head of Customer Center and External Sales/Odd Magnus Barstad, Head of Claims, If P&C Insurance (Finland, Sweden, Norway, Denmark)

“Now, more than ever, every organization must innovate to stay relevant, to stay on top. This book outlines a step-by-step approach to listening to your customers, engaging your employees and delivering products and services they love.”

Robert Pasin, Chief Wagon Officer (CEO), Radio Flyer



Leading the Customer Experience

How to Chart a Course and Deliver Outstanding Results

Brad Cleveland



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Boosting the value of customer service

Singapore is one of my favorite places. I love the food, enjoy the vibrant culture, and admire the world-leading innovation that's brought prosperity to so many who live there. Through my career, I've enjoyed a number of opportunities to participate in projects and conferences there.

My first visit (almost two decades ago now), however, brings back some uncomfortable memories. I was brought in to present to a conference of call center leaders. The theme: how a growing number of call centers were (and still are today) becoming valuable strategic assets. The best were (and are) directly involved in product and service innovation, based on insight picked up when serving customers. The discussion was interactive and it was inspiring to hear the progress being made by so many in the room.

There was a well-attended reception following the event. A journalist with *The Straits Times*, the main newspaper, asked if he could do a quick interview. I agreed and we headed to a corner of the reception area to talk. One of the questions he asked was, "How many call centers have reached this level of strategic value?" This was years ago, and many organizations were new to call centers. Far fewer had built them into strategic assets. My answer: "Our research shows that between 10 and 15 percent of call centers worldwide are leveraging this opportunity. This is a new and exciting development," I enthused.

At 4:30 the next morning, I was in the airport waiting for my flight back to the States. Groggy, I was flipping through a freshly delivered stack of newspapers. Then. There it was. My picture along with the journalist's article splashed across a page. My heart sank as I read the title: "85% of Singapore call centers not well managed, research finds."¹ In the stock

picture, I'm smiling in suit and tie, looking like I'm smugly passing judgment on the entire city-state of Singapore. "NO!" I silently screamed to myself. "That's not what I said! That's not even close to what I mean!"

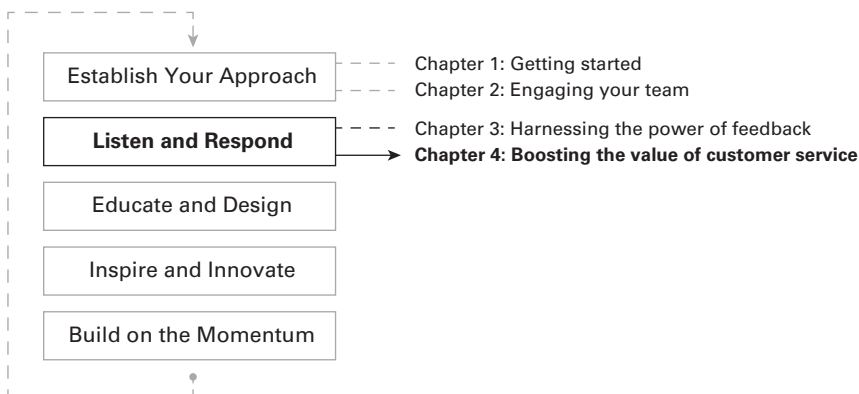
My new friends in Singapore had yet to wake up before my flight took off. Some 18 hours later when I landed in L.A. and turned my phone on, I thought it was going to melt down in my hand. "Why would you say that?" "Are we less advanced?" "I seem to recall you telling us Singapore was among the leaders." And the most heartbreaking to me: "I've been working for years to elevate the status of my center; this article is a setback."

I wrote many notes and apologies. And I sent a letter to the editor with clarifications that got good press. I even think most of my friends there understand what happened and have forgiven me. All is well that ends well. But I resolved at the time to be way more careful with the press. I also made a commitment to do everything in my power to be a voice for the strategic value of customer service.

The trend I was trying to explain to the journalist—boosting the strategic value of customer service—is alive and well and continues to develop today. Ignore it at your peril. It bothers me to sometimes see missed opportunities to serve customers well. It is especially painful, though, to see strategic value literally slip through our fingers. Along with customer feedback, customer service is our golden opportunity to listen (deeply, strategically) and respond.

In this chapter, I first encourage you to assess the current value of your organization's customer service. We'll then look at building services around

FIGURE 4.1 Leadership Framework, Chapter 4: Boosting the value of customer service



customer expectations, eliminating damaging (and all too common) service frustrations and shaping an effective customer access strategy. We'll conclude with a deeper dive into strategic value—an initiative that goes far beyond “customer service” and fuels customer experience.

Assess the current value of your organization's customer service

Truth be told, many organizations don't get nearly the return they could from their investments in customer service. Often, some misguided perspectives are at work. For example, service is just a necessary cost to be minimized. Or, service is important, but not a differentiator for us; being “okay” is good enough. Or, benchmarks (e.g., on customer satisfaction or costs of service) say we're right in the ballpark. Or most damaging: great service is expensive, right?

On that last point—if you think great service is expensive, just try not-so-great service for a while; you won't like the results. But here's the thing. I'm not overly concerned when I run into these views. I've seen how they can change—in many cases be completely turned around—with some sound analysis and the right business case.

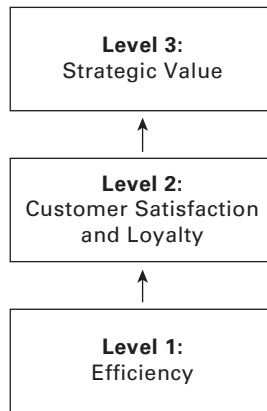
Nope, the situations that worry me are those where the organization has largely bought into the need to provide good service. They are trying to do a good job. And yet, they haven't truly leveraged service to deliver on its potential. That's the worst case—big investments in time, money and energy without the big returns.²

Here's a simple framework for assessing the value of your organization's customer service. There are three levels on which effective service creates value. Thinking through each can be helpful in seeing the potential of customer service to shape better customer experiences.

Efficiency. The first level is efficiency. What do you picture when you think of customer service that is efficient? You may envision the right information being accessible at the right times to those delivering service. Or robust self-service capabilities. Or preventing repeat problems before they happen. Each is part of the answer.

Customer satisfaction and loyalty. A second level of value is contribution to customer loyalty. The principle is, if you were to measure customer satisfaction before and after a customer service encounter, effective service should translate into higher scores. In a classic study often cited in business

FIGURE 4.2 Three levels of customer service value



schools, Marriott found that 89 percent of customers who had no problems were likely to return, while 94 percent of customers who had problems that were resolved were likely to return.³ When service is done right, it does maintain and even boost a customer's loyalty.

Strategic value. A third level of value is strategic. Strategic, meaning cross-functional, impacting the organization as a whole. Here, customer service contributes value to other functions. Every day, your customer-facing services have visibility on the organization's products, services and processes. Those insights can easily fall through your fingers. But when you're set up to capture and use them, they can help the entire organization improve and innovate.

Self-assessment—the strategic value of service

As you consider the strategic (cross-functional) value of customer service, rate yourself on these contributions. Customer service:

- Assists sales and marketing by providing insight on what customers want and expect. This includes identifying any mismatches between what was promised and what is delivered.
- Helps operational areas or manufacturing pinpoint and fix quality problems. This includes insight on products, processes, and user guides.

- Contributes to research and development (R&D). This includes sharing insight on customer requests, the organization's competitive strengths and weaknesses, and innovation opportunities.
- Identifies improvements needed in self-service capabilities, and is a part of designing and improving apps, websites, FAQs, how-to videos, and other resources.
- Serves as an early warning system for potential legal troubles, from product defects, security holes in an app or websites, inaccuracies in warranty statements, and others.

I love seeing organizations make the most of these opportunities. For example, the University of California's Retirement Administration Service Center (UC RASC) uses what they learn to shape retirement resources for their 130,000 members. Lutron—a global electronics company that makes lighting, temperature control, and other systems—harnesses customer interactions to help shape products, improve user guides and simplify connectivity (there's more detail on these examples later in the chapter).

Any organization of any size—from small bike shop to global IT company—can unlock the strategic value of customer service. It's a gold mine. But first things first. Before you can produce this third level of value, you'll need to build a strong foundation. That requires understanding customer expectations, and shaping an effective customer access strategy.

Develop services around evolving customer expectations

The experiences that customers have with any organization—not just yours or others in your industry—shape their perceptions. So you've got to continually revisit what good service means. For customer experience leaders, this can seem like a daunting challenge. Fortunately, it's not hit-or-miss guesswork. The International Customer Management Institute (ICMI) has identified 10 expectations customers have of customer service.⁴ They include (in no specific order):

- be accessible (in the channels I prefer)
- treat me courteously
- be responsive to (and anticipate) what I need and want
- do what I ask, promptly
- provide well-trained and informed employees

- tell me what to expect
- meet your commitments and keep your promises
- do it right the first time
- follow up
- be socially responsible and ethical

What is changing, of course, is what these expectations mean. Accessibility is an example. For many organizations—even, say, a small retail store—customers assume that your services will be available from a convenient range of channels, which may include in-person, phone, self-service, mobile-friendly information, and any number of alternatives. They may initiate dialog through their smart watch or with voice command. Customers don't want to think about the channels or processes. They just want service to be understandable and easy.

Beyond these 10 expectations, there is another category of expectations that applies to service delivered in person, such as in a retail store or restaurant. It's called "tangibles," and refers to the aesthetics and functionality of the environment.⁵ In other words, anything that impacts the customer's perception of the organization and service being delivered. These include:

- the facilities (comfort, appearance, functionality)
- employees' appearance (e.g., is there a dress code?)
- safety (e.g., masks during Covid-19 or a well-lit parking lot)
- amenities (e.g., Wi-Fi and water in waiting areas)
- design (e.g., how easy it is to get around a building or complex)
- other factors unique to your environment (e.g., daycare at a gym)

In fact, other customers can be considered one of the tangibles. Most restaurants require shoes and shirts, and some even ties or jackets. But for a snack bar at the beach, swimwear is fine.

You'll want to consider both categories—the 10 expectations of service and the tangibles. Then, regularly revisit customer expectations with your team as you shape your approach to service. I encourage you to be creative. For example, Andaz hotels, which is part of the Hyatt group, replaced the traditional lobby with a comfortable, open lounge; arriving guests are treated to a beverage as they are checked in by a host with a tablet. And here's one of my favorite examples: many dentists' offices, once dreaded by

children, now feature greeters at the door, games, and a choice of flavors for cleanings. If your intent is to promote and encourage better health with these young customers, *why not make it fun?!*

Unfortunately, poor examples abound. Let me mention two—and my purpose is not to call them out here publicly, so I’m withholding names (I will send a copy of the book to them with a constructive note). One is a historic hotel in the San Diego area that I’ve stayed at many times over the years. It’s one of my favorites, but they are, it seems, becoming complacent. The first thing you’re greeted by these days is a long, slow-moving line in the crowded lobby, just to check in. It feels incongruent with the storied history of the property. We’ve sometimes made other arrangements just to avoid the hubbub—it’s a process that begs for innovation.

Another example is a well-known manufacturer of windows and doors. The message on their homepage: Our goal is to exceed your expectations. One of my colleagues, part of the review team for this book, relayed to us an experience she’s having with the company: “For two months, I’ve been trying to get help from them to replace rain strips on windows they provided. I’ve begged, I’ve pleaded. I’ve used a magnifying glass to painstakingly provide serial numbers. I finally got a quote by email for \$1,400. Clearly, they’re not interested in providing this help. I then found a little company called Swisco. Their website allows me to text pictures of what I need. Within five minutes, I was directed to a specific part number and tool to confirm measurements. I placed an order for \$75 and can replace the weather stripping myself. What the manufacturer doesn’t know is that we have a remodel in the works and there is no way we would consider using them again.”

“*Like termites you can’t see, poor experiences eat away at your brand and threaten your future.*”

The hotel and the window manufacturer I mentioned have good brands and may be okay for a while. *Maybe*. One thing I’m sure of, though, is that they aren’t aware of the damage they are doing. They are forcing good employees to field these frustrations and are squandering customer time and goodwill. Like termites you can’t see, poor experiences eat away at your brand and threaten your future.

As you explore customers’ expectations, let me make three recommendations. First, listen to your customers. Make the effort to get input from

customers and employees firsthand. And make use of all forms of customer feedback to better understand expectations (see Chapter 3). Second, trust your instincts. If you prefer clean restrooms when you're on a road trip, if you would like to run a question by your insurance company on a Saturday morning (because you're busy the rest of the week), these may be obvious opportunities. Companies such as Wawa and GEICO have leveraged them into services that have fueled their brands. Third, and above all, make service easy and resolve issues quickly. Simplicity and speed are proving to be sure winners.

(There are resources at www.bradcleveland.com/resources that can help you and your team think through your customers' expectations.)

Eliminate the most damaging customer service frustrations

When my iPhone battery life began to diminish, I searched for “Apple support phone number.” While Apple doesn't hide their phone number, I scrolled down the page to see what other options were available. It was a Monday morning, and I knew they would be busy. I navigated to the header—*Need service or support? Start your request online, and we'll find you a solution*—then selected my product and problem. I was then offered four options: bring the product into a store, send it in for repair (which I could schedule online), initiate a chat, or initiate a call. Current estimated wait times were provided for each channel. The automated tool issued me an “issue ID,” and when I initiated a call, my product/problem selections were passed along to the rep.

Of course, with some behind-the-scenes knowledge, you know this intake method quickly resolves issues that don't need a live rep. It decreases misdirects by gathering critical information before the interaction is routed. I avoided the phone menu entirely since the automated system knew who I was and why I was calling. I was placed in the appropriate queue. The wait time estimate was provided, an acceptable five minutes. The rep who answered my call knew who I was, why I was calling, had my warranty information, and we jumped right into troubleshooting.

Why can't all companies do this? The principles that guide effortless customer experiences seem basic: don't make me wait, make it easy to access service, provide me with a knowledgeable and helpful service team member, create easy processes, and know who I am. The truth is, it's difficult to get customer service basics right, and many organizations don't. While customer service catastrophes still make headlines (remember Dave Carroll's hit song

*United Breaks Guitars?*⁶), run-of-the-mill customer service annoyances are still maddeningly common. And the consequences to businesses are dire. You've perhaps seen these or similar statistics: 88 percent of customers consider customer service when they contemplate a purchase, and 58 percent will stop doing business with a company after a poor service experience.⁷

For customer-focused companies who exist to provide effortless, pleasant, and sometimes dazzling customer experiences, this is their life's work. They know customer service is both a frequent customer touchpoint and a well-known source of dissatisfaction. As a result, resolving service frustrations is often among the first steps for any organization working to improve customer experiences. There are five universal frustrations that can point you in the right direction.

1. *Don't make me wait*

Waiting in line, waiting for a callback, waiting for a return to be processed, an order to be delivered, or an application to be approved. Customers don't like waiting. When left to wait too long, they're more likely to go somewhere else next time (if they can), tell their friends and family, and take it out on the employee who ends up helping them.

How long is too long? The answer can vary. Benchmarks provide useful data points but don't reflect your unique customers and the issues they are trying to resolve. An insurance company may find their customers are less wait-tolerant to file a claim, but more wait-tolerant to check on a payment. A medical center may find customers expect the contact center to be open before the day's first appointment at 5:00 am.

The great news is this information is available if you're willing to go to the trouble to get it. Survey customers about wait times. Correlate wait times with customer satisfaction data by customer type and service. Analyze the percentage of customers who abandon along with wait times. These steps will add up to a more complete picture. The bottom line: are your customers happy with the wait when they need help? In a customer-centric organization, this matters more than the length of the actual delay (see box below, the power of one).

I used to sympathize with organizations that grapple with busy Monday mornings or heavy seasonality. No more. Consider Balsam Hill, the world's largest provider of handcrafted artificial Christmas trees (the Vermont White Spruce is stunning). Mac Harman, founder and CEO, told me (and I'm resharing with his permission) that 60 percent of Balsam Hill's annual sales

arrive in the five weeks from November 1 through the first week in December. That’s no typo: *60 percent!!* How do they do it? A combination of five things: 1) all hands on deck, 2) business partners, 3) an incessant focus on preventing unnecessary customer service issues (better manuals, quality improvements, video and text FAQs), 4) chatbots, and 5) a secret ingredient that I can only guess at: Bailing wire and chewing gum? Magic? Co-sourcing with Santa? If Mac and his team can handle that kind of peak, the rest of us should be able to tackle those busy Monday mornings.

THE POWER OF ONE

Employees have an impact that goes far beyond the customers they directly help. Consider a group of 20 employees who are helping 100 customers over a 30-minute period of time. I produced a table of predictions based on the formula Erlang C. (Erlang C predicts staffing requirements when customer queues are involved—retail stores, contact centers, restaurants, or others. A search will locate web pages that provide Erlang C calculations, and most staffing software uses the formula. To access a simple Erlang C calculator, see www.bradcleveland.com/resources.)

FIGURE 4.3 Example of a customer queue

Average handling time: 5 minutes
Number of callers in half hour: 100

Employees	<= Number of customers waiting longer than x seconds =>											
	5	10	15	20	30	40	50	60	90	120	180	240
17	90	90	89	89	88	87	86	85	82	79	74	69
18	65	64	62	61	58	56	53	51	45	39	30	23
19	46	44	43	41	38	35	33	30	24	19	12	7
20	32	30	29	27	24	22	19	17	12	9	5	2
21	22	20	19	17	15	13	11	10	6	4	2	1
22	14	13	12	11	9	8	6	5	3	2	1	0
23	9	8	7	7	5	4	4	3	2	1	0	0
24	6	5	4	4	3	2	2	1	1	0	0	0

With 20 team members, 32 customers wait five seconds or longer. As things play out (just glance along that row from left to right), 30 customers are still waiting ten seconds or longer, 29 are still waiting 15 seconds or longer, and so forth. You can see that a couple of customers wait 240 seconds (4 minutes) or more.

What happens if you have only 17 employees? *Woah! Dozens of customers are waiting four minutes or longer.* Look at the results when you have just one more person who jumps in and helps out. You've seen that dynamic on expressways. When one car stalls on the side of the road, every lane can get backed up. And you've seen it in busy grocery stores; when they open one more checkout lane, all the lines shift around and everything moves more quickly.

Just remember, each employee has a significant positive impact on customer wait times—a ripple effect far beyond the customers they serve directly. Include this principle in training—knowing about it can put a new bounce in their step and pride in their work.

2. Make it easy for me to find help

Making it easy for customers to find help encompasses the entire customer journey, including customer communications, self-service, interactive voice response (IVR), and digital channels. Consider a recent problem you experienced. How easy was it to find the right place to direct your question—a dedicated Twitter profile, a phone number, an email address, a chat link? Was it a channel you prefer? Did you get to the right resource easily, or did you get transferred or moved to another channel? Did you feel confident you were in the right place?

Making it easy to find help takes thought and design. Those who design communications, phone menus, web pages, and mobile apps will need to anticipate when, why, and how customers will contact the organization. A solid customer access strategy, which we'll discuss in the next section, is an important tool.

3. Provide knowledgeable and friendly customer service staff

When things go wrong, your customers will turn to your employees for advice, support, and resolution. Customers will form an opinion of the company based on those they interact with. That is why hiring capable employees, training them well, giving them the tools they need, and empowering them to deliver good service is so important.

It is easy to obtain customers' perceptions of the helpfulness of your employees. Customer satisfaction scores, complaints, and employee observations can help you determine which customer service team members shine,

and who needs additional training or coaching. Analysis of feedback and observations may also alert you to the need for improvements in recruiting and hiring, training and coaching, even goals and metrics, to support the service customers want.

4. Create customer-friendly policies and processes

Processes are at the core of service delivery. Processes largely determine how long customers wait, how easy it is for them to access help, and virtually every other aspect of service and support. Even the most dedicated customer service team members are crippled when they have to represent inconvenient policies or work within cumbersome processes. And we know the majority of escalated complaints are due to issues that needed multiple contacts to resolve or required the customer to navigate complicated processes.

As you map customer journeys (see Chapter 5), keep some goals in mind. You want customers to feel that getting to a positive resolution is easy and that you are there to support them. Gathering data on how well your processes are performing can take some digging. You may need to trace the customer over time, across multiple channels and departmental touchpoints. Technologies are getting far better. But in most cases, customer feedback and employee input will provide much of the information you need.

5. Know who I am

Consumers expect a seamless experience when they move from one service channel to another—for example, when opening a ticket in an online portal and then calling about it. When customers call multiple times about a single issue, they expect the representative to know who they are and what’s happened so far. This means creating systems and methods to proactively identify customers. That will enable you to access their history, and track their journey through multiple contacts, touchpoints, and channels. From an experience perspective, your goal is for the customer to hear, “Hi Mr. Jones, I see you have an application started in our system. Are you calling about that today?”

Studies reveal these five frustrations as most common. But are they your customer’s frustrations? And to what degree? I encourage you to use this list as a starting point, to fuel your own customer service pain point audit.

One more recommendation here: don’t get discouraged. An experienced and influential practitioner who was part of the review team for the book

shared these comments: “I’m feeling a little overwhelmed with this section. For one, there seems to be pressure from many to introduce new channels. But don’t you have to do a good job with those you already have? Can’t you direct customers to channels that will facilitate the help they need? Second, these five areas are presented as the basics. But they are hard, and I get discouraged. Is that just me?”

There’s a lot of wisdom in his comments and I agree 100 percent. Don’t get too clever before you get the basics in order. To use a sports metaphor, these five areas are “blocking and tackling” (the fundamentals). But blocking and tackling is not easy. That’s why, whatever your sport, musical instrument, or craft, you worked on the fundamentals more than any other area. Over and over. That’s why the greats stress them. They’ll never be easy. This is an ongoing pursuit. Don’t get discouraged and don’t strive for perfection. Do keep working on them.

“*Don’t get too clever before you get the basics in order... these five areas are “blocking and tackling” (the fundamentals). But blocking and tackling is not easy.*

Shape a cohesive customer access strategy

Whether you’re a small startup, a national government, or a multinational corporation, you need a plan that defines how your organization will deliver customer service. In most organizations, the need for a plan becomes clear. Think about introducing a new product. How will you support it? What person or group will handle customer service issues? Will that impact resources and budgets? You get the idea—there are many decisions you and your team will need to make.

In customer service, the overall plan is your “customer access strategy” (it can also be referred to as a customer engagement strategy, or just service strategy). Let’s look at what a customer access strategy is, and the components that make up an effective plan.

I define customer access strategy as “a framework—a set of standards, guidelines and processes—describing the means by which customers receive or are enabled to access the information, services and expertise they need.”

“**Customer access strategy:** *A framework—a set of standards, guidelines and processes—describing the means by which customers receive or are enabled to access the information, services and expertise they need*

An effective customer access strategy includes 10 components and my encouragement is to begin by identifying them and thinking about them together.

COMPONENTS OF A CUSTOMER ACCESS STRATEGY

- Customer segments
- Types of interactions
- Access alternatives
- Hours of operation
- Service level
- Routing
- People/technology
- Information
- Analysis/improvement
- Guidelines for deploying new services

First, consider **customer segments**. In a large organization, this is typically defined along with marketing, and it summarizes how customers are logically segmented. For example, insurance companies will identify segments by the policies needed, where customers are located, whether they are businesses or consumers, and so forth. Even the smallest organizations have segments to consider—your restaurant may encourage special celebrations, group functions, business meetings, or others.

Second, identify **types of interactions**. For example, placing orders, customer service, technical support, and others. Think through how each type of interaction could improve customer loyalty and build value. Some you'll work to eliminate (through improved products and services), some you'll want to automate through self-service, and some will best be served with the involvement of a person.

You'll then look at **access alternatives**. This step—where strategy really begins to get practical—identifies all of the possible communication channels (phone, chat, email, social media, text, video, app on smartphone or smartwatch, face-to-face, self-service, customer communities... the lot) along with corresponding telephone numbers, web addresses, email addresses, social media usernames, IVR menus, physical addresses, etc. Where more than one channel is involved in an interaction (say, when a customer begins in an app and has a conversation with a person) define as many possible combinations as you can.

Next, consider **hours of operation** and how they may vary for different types of interactions. Generally, self-service applications will always be available. Some employee-assisted services may be available 24/7, while others may have more limited hours. For example, customers can report emergencies such as downed power lines to their utility any time of day or night, with general customer service (billing inquiries, etc.) available during the day.

Next, **service level** defines the organization's objectives for speed of getting help. What are your goals to minimize how long customers will have to wait? Different objectives may be appropriate for different types of interactions, contact channels, and customer segments.

Next, you'll consider **routing**. This part of the plan covers how—by customer, type of interaction and access channel—each customer interaction is going to be routed and distributed to the right place. In other words, what person or what team is going to handle it?

The next component summarizes the **people and technology** resources required. This step transitions from “getting the customer to the right place at the right time” to “doing the right things.” Which employees and which systems will come into play for each type of interaction?

The eighth component of your plan summarizes the **information** required. What information on customers, products and services will need to be accessible? What information should be captured during the service interaction? This is a logical place to summarize how the organization will comply with any privacy or reporting requirements.

In the next step, **analysis/improvement**, you'll define how the information captured will be used to better understand customers and to improve products and services. You may also want to summarize major performance objectives and how the value and contributions of customer service will be measured.

In the final step, **guidelines for deploying new services**, your plan should outline a framework for deploying new services, including technology architecture (corporate standards and technology migration plans) and investment guidelines (priorities for operational and capital expenditures). This step should also describe who will keep the customer access strategy current as services evolve, such as who has overall responsibility, how often the plan will be updated, and who has ownership of individual components.

You might be thinking, *whew*, there's a lot to it! To the contrary, though, it's a nightmare to not have a customer access strategy. A consultant who reviewed the book wrote: "This is so straightforward. If only everyone put thought into it. I'm working with a client that has thousands of contact points. There has been no impetus to provide any control or guidance. Anyone seems to be able to set up a Facebook page, LinkedIn group, or new phone number. Now they are grappling with how to provide service on all those fronts. It is a mess."

I've found without fail that the thought you put into your CAS will come back to you in both time and better decisions. Just recently, I've seen the benefits for a small catering company and a large government service operation with more than 10,000 employees. So just get started. Start simple and begin to build out these 10 components. You will soon see the benefits of having a common plan to work from. (There is a customer access strategy worksheet at www.bradcleveland.com/resources.)

What does a customer access strategy look like?

Customer access strategies are like business plans in that some are well documented and others exist only in pieces and in the heads of various managers. Too often, the latter is the case. But there are standout examples of plans that are effective and up to date.

A mobile phone company I have worked with has a well-organized customer access strategy, which lives on the organization's secure intranet. It consists of a cleanly designed home page, the centerpiece, which provides

links to each of the individual components. The links access files (e.g., databases, documents) that make up the different parts of their plan, such as customer segments, access numbers and addresses, routing diagrams, customer service teams, hours of operation, service level objectives (and so forth). There are also links within these areas that allow you to logically move to others—but the home page will always get you back to the main directory.

The most impressive aspect of the plan is that it lists who is responsible for keeping the overall plan current, and the individuals who have ownership over various components, including marketing (customer segments) and IT/telecom (routing schematics). Each document has an “updated on ___” date notation. The plan is current, and they don’t make major decisions without referring to it.

Your customer access strategy will be a guide that you can use to answer many important questions. For example, how should your customer service functions be organized? What kinds of skills and knowledge will your employees need? What system capabilities best support your strategy? Are your organization’s overall strategy, customer access strategy, and the realities of budgets and resources in alignment?

Customers don’t think of contact channels or departments. You don’t hear a customer say, “I’m going to contact XYZ’s customer service department.” They simply say, “I’m going to contact XYZ.” To them, customer service is the company. The best-led organizations know this, and they cultivate customer access strategies that enable their brands to shine through. (You’ll find some additional examples and templates at www.bradcleveland.com/resources.)

“*The best-led organizations cultivate customer access strategies that enable their brands to shine through.*”

CASE STUDY

“Playbook” at the University of California

Does a customer access strategy sound like something that would be nice to have? Actually, it’s vital. Just ask anyone who’s part of the University of California’s Retirement Administration Service Center (UC RASC).

The University of California is the world’s leading public research university system, with 10 campuses, five medical centers, three national labs and a network of

researchers and educators. The RASC provides retirement administration services to professors, administrators and others who are part of the university's retirement plan—more than 130,000 active members, as well as thousands more who are inactive vested members or retiree health enrollees.

Ellen Lorenz, Director of UC RASC, shares, “The more we worked on our customer access strategy, the more excited we got about it. It has become a tool that all of us within the RASC use and reference. It gives the team a strategic view of why we do what we do—a view that doesn't get lost in day-to-day activities.” Many RASC employees provided input into shaping the customer access strategy, which the team now refers to as the “Playbook.”

The Playbook has brought many benefits: better focus on priorities, teams that are increasingly self-directed, and projects that come in on time and within budget. It even helps RASC employees envision and develop their careers. And the most exciting benefit? The University of California uses the RASC as an enticement to attract some of the best professors, doctors, researchers and specialized talent available in the global market.⁸

Make it yours!

What access channels should be opened up? What's the nature of the service you intend to provide? These decisions are yours to make. My advice: make your customer access strategy uniquely yours—do what's best for your customers and your organization. Here are some examples of how customer access strategies are playing out:

- Discover Card uses in-app messaging technology to enable customers to reach employees easily. Customers can respond to employees when they choose without having to start over on an issue. This is a big advantage over conventional chat, which requires customers to stay connected until a problem is resolved.
- Dyson, manufacturer of household appliances, prominently displays its website and toll-free number right on product handles—clearly visible to anyone who uses an appliance. While some organizations try to discourage contact by making information hard to find, Dyson sends the bold message that they are there to help.
- Intuit's Accounting Professional Division developed an active customer community where users help each other with questions. Intuit's contact

center employees have become facilitators and a second level of support—problem solvers for issues requiring the company’s involvement. The technology allows easy access to the community directly from software packages. (We’ll discuss user community platforms in Chapter 6.)

- Barclays Bank, based in London, England, has been a pioneer in video banking, enabling customers to use their smart phone or tablet to chat “face to face” with a representative. The service is available 24 hours a day, 7 days a week, and supports a wide range of the bank’s products and services.
- Many companies that provide technical support—Dell, Square, and others—have embraced co-browse capabilities, which enable the support rep to share the customer’s screen and directly access the system to fix problems. These capabilities have significantly boosted quality and customer satisfaction, while reducing handling times.

These are just glimpses of approaches that came about thoughtfully. Observe the organizations you most enjoy doing business with, and you’ll notice the best deliver services in ways that meet your needs and complement their brands.

Given the many ways to interact, a best practice is to create an easy-to-find online guide to access alternatives. Do a search on “how to contact [HSBC, KLM, Apple]” and you’ll see good examples of the primary ways to reach the organization. And a word to the wise: organizations that make their contact information hard to find (usually in an attempt to minimize costs) are asking for trouble. A search will usually pull up other sources—blogs, customer communities, and sites that provide tips for reaching the organization. These can include contact numbers, advice on navigating difficult menus, or (when the company is perceived to be purposely hard to reach) direct contact numbers for administrative offices or executives.

Clearly, a customer access strategy is not something you throw together in an afternoon team brainstorm (though that can give the creative part a push!). It takes leadership, persistence, and participation from across the

“*Organizations that make their contact information hard to find (usually in an attempt to minimize costs) are asking for trouble.*”

organization. But the payoffs are huge. From a customer's perspective, a good strategy will result in simplified access, more consistent services, and a high degree of convenience. From the organization's perspective, you are building a platform that enables you to boost the value of customer service.

Build the strategic value of customer service

Understanding customer expectations, eliminating service frustrations, and shaping an effective customer access strategy are important steps in building a strong foundation. But what about strategic value? How do you take your services to that level? A practical way to get started is to build a cross-functional team to analyze the reasons for customer service interactions. Graph the frequency of top drivers to discover trends, then act on what you're learning.

There are two essential categories of information. One comes from the interactions themselves: What are the drivers of customer service issues, the reasons customers need help? And what do you learn in the course of handling interactions? A second source of information comes from assessing the impact of improvements. For example, how many service calls are avoided as you improve self-service? How are customer reviews influenced by service improvements?

CASE STUDY

Lutron's "Insight Center"

Lutron, a global electronics company, is a major player in the Internet of Things (IoT) and connected home markets. Products include control systems for lighting, ceiling fans, shading and others, which can be controlled from smartphones, voice assistants (such as Alexa), and other devices.

Matt Dixon, advisor and co-author of *The Effortless Experience*, and Tim Donchez, Continuous Improvement Director at Lutron Electronics, recently presented a case study of Lutron's experience in harnessing strategic value. Lutron's contact centers handle complex interactions—they come from retail partners, distributors, electricians, architects, individual consumers and others. And they inherently involve products not only from Lutron, but from other companies as well. Tim shared an essential ingredient to success: "We hire great people, and we trust them to use their judgment to serve our customers."

Lutron records calls and uses analytics to better understand the content of those calls, but not with improving frontline performance as the objective. Instead, the

goal is to mine the rich feedback customers provide on Lutron’s products, brand, services, installation experiences and (as Matt puts it) “almost every other thing that leaders at Lutron need to make better products and deliver a better experience to their customers.”

Tim points to numerous insights that have been gleaned through this approach. For example, a particularly vexing installation problem that drove a lot of calls was solved by addressing some confusing language in the installation instructions. In other examples, the contact center partnered with the engineering team on new product launches, and provided guidance to retail partners on products and services.

Tim summarizes the value of the contact center: “We’ve got a line of business partners out the door who want to get access to the data because it allows them to deliver products and experiences to our customers—to learn quickly what’s working and what’s not and then to act decisively.”⁹

The real value in customer service is in being a set of antennae, the eyes and ears that can help you understand what’s happening and to see ahead. Yes, service is necessary to help those customers. It always will be. But the real value is in helping ALL customers (and future customers) by being an engine of innovation. My encouragement is to revisit the self-assessment near the beginning of the chapter: How can you be proactive in helping the organization set and meet expectations? How can customer service be a partner in innovation and improvement across functional areas—marketing, operations, R&D, IT, and others?

Only a small percentage of organizations harness the strategic value of customer service. So as you develop this area, you’ll be among the few and the best. And you’ll be positioning customer service to strongly support your customer experience transformation.

KEY RECOMMENDATIONS

- Assess the current value of your organization’s customer service.
- Develop services around evolving customer expectations.
- Eliminate the most damaging customer service frustrations.
- Shape a cohesive customer access strategy.
- Build the strategic value of customer service.

Notes

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