



## Being Proactive and Generating Results

*Anticipating and acting on customer needs and preferences can enhance the customer experience and boost results*

**Just the Facts:** Customers share a great deal about themselves through their interactions with companies. Whether they show interest in a product on a company’s website or ask for help with a problem they may be encountering during checkout, such cross-channel interactions provide a goldmine of data. It’s in companies’ best interests to turn the data resulting from those interactions into opportunities to proactively interact with customers and anticipate their needs.

By applying the right strategies and implementing the necessary technologies to gain a better understanding of customer needs and preferences, companies can proactively communicate with customers during future service interactions and send marketing communications that resonate.

Customer expectations continue to rise, so it’s simply not enough for companies to only offer reactive service when a customer has a particular issue to resolve. “Today’s demanding consumer has created this dynamic where there’s a competitive requirement for companies to deliver customer experiences that are above and beyond or run the risk of losing a customer to a competitor who can,” says Kristyn Emenecker, Vice President, Product Marketing at inContact. “There’s tremendous brand equity in having customers who are able to share great experiences with their friends and other social media connections.”

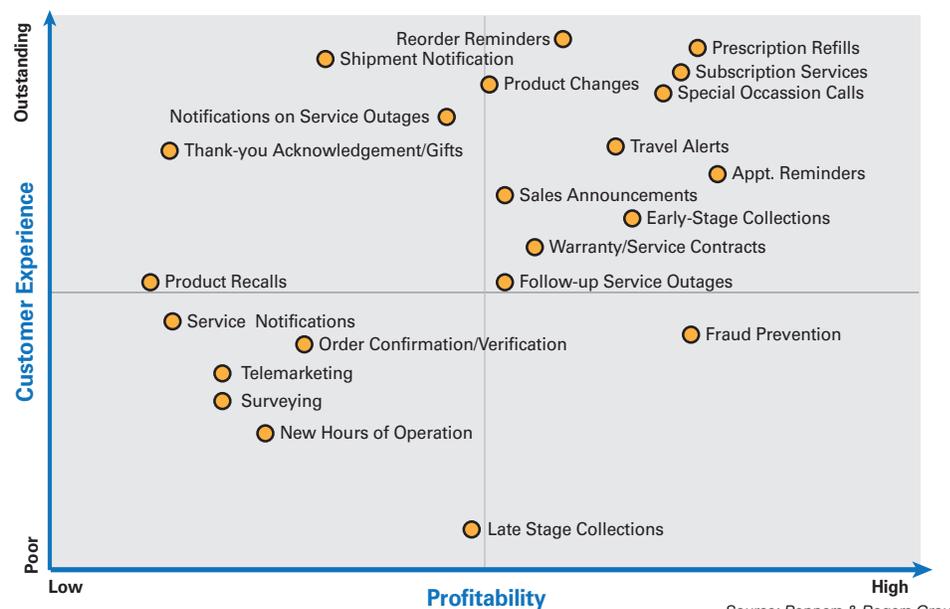
A growing number of solid business cases prove the benefits of proactively serving customers. Research from Frost & Sullivan reveals that 87 percent of customers who receive follow-up calls have a positive image of those companies.

### Tapping technology

Of course, companies can’t simply flip a switch and suddenly deliver proactive services. Enterprises that have traditionally focused on reactive service have to deal with the cultural and process challenges associated with shifting to a proactive service environment. This includes transitioning from traditional inbound customer communications to a more blended approach. Meanwhile, companies also need to coach and train agents who are accustomed to providing reactive service.

### Mapping Proactive Service to Profitability

Outbound customer notifications can improve customer experience, enhance relationships with existing customers, and drive higher profitability.

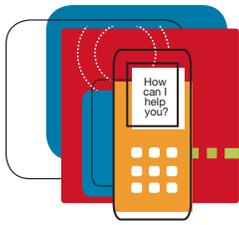


Once companies are able to develop a methodology and the where-withal to deliver proactive service, customers benefit and the business results follow. For example, providing customers with proactive service can improve the productivity of the contact center by reducing inbound call volume and making greater use of agent availability.

Of course, companies need the right tools and strategies to support a proactive service environment. This includes the use of analytics tools and techniques to identify customers’ preferences, needs, and pain points that are shared in social media channels or during contact center interactions. Companies can also use analytics to determine the next best action to take with a customer, such as a product offer based on recent purchases or online behavior (e.g. a ladies’ fashion customer is spending a significant amount of time on a retailer’s web pages for blouses).

Companies also need other technologies to support a proactive service environment. These can include the use of an outbound dialer solution to offer customers a variety of proactive services. For example, a pharmacy can send a customer an automatic reminder when it’s time to refill a prescription. Companies can also leverage outbound communications for appointment reminders and other notifications.

## 5 Tips for Delivering Extraordinary Proactive Service



**“Proactive service can help improve customer satisfaction while driving greater productivity in the contact center.”**

—Jennifer Waite, Product Marketing Manager, inContact

Proactive service doesn't occur in a vacuum. Here are five steps companies can take to deliver the type of prescient outreach that truly resonates with customers:

**1. Deliver proactive service to the right customer at the right time.** Companies can use predictive, sentiment, text, voice, and other types of analytics tools to evaluate what customers are sharing about their support needs, preferences, and behaviors in various channels and then use these insights to tailor communications outreach in the most appropriate channel (e.g. extending an offer to chat to an online customer who appears stuck on a web page). When companies only provide reactive service, they ultimately deliver on-the-fly assistance to customers after an issue arises, rather than reach out in meaningful ways prior to them making a purchase. “[Reactive service] isn't the best method for engendering long-term customer satisfaction,” says Jennifer Waite, Product Marketing Manager at inContact.

**2. Identify and anticipate the critical touchpoints in the customer experience.** Cloud-based contact center services and user experience technologies can help companies to quickly spot when a customer may have experienced a snag in resolving a support issue (e.g. a customer who transitions from IVR to chat) and then use this information to provide a relevant offer to assist without forcing customers to repeat themselves. Meanwhile, a company's CRM system can provide a log of how

customers have communicated with the organization and which channels they've used, providing decision-makers valuable insights as to the most appropriate channels to use for customer outreach.

**3. Overcome the key cultural and process barriers to providing exceptional proactive customer service.** The biggest challenge here is bringing agents into the fold. This starts with interviewing and hiring agents who have demonstrated outbound communications skills. Companies should also identify existing agents who are adept at engaging effectively with customers via chat, social, mobile, and other platforms and then provide them with the necessary training and coaching. While product knowledge is critical, companies need to devote adequate time to engagement training.

Performance measurements must also be re-evaluated and efficiency-focused metrics such as Average Handle Time should be superseded with customer-focused measurements such as customer satisfaction. Agent incentives and the metrics used to measure proactive customer communications also must be recalibrated.

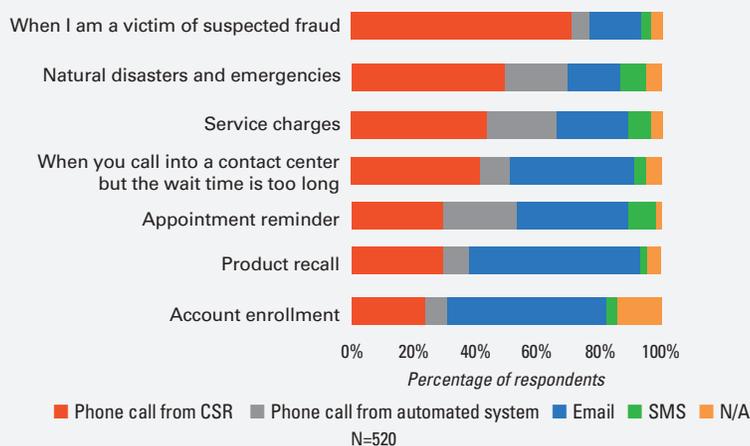
**4. Effective approaches for transitioning traditional inbound contact centers to providers of proactive outbound services.** Companies can transition to a proactive environment by implementing a change management program. Doing so can help agents and other employees to better understand the rationale for the transition to proactive service and to identify the competencies and capabilities that are needed to get there, says Cheryl Nolan, Director at Peppers & Rogers Group. It's also critical for companies to set goals and expectations upfront: Understand what the organization is attempting to accomplish and identify the type of events that would trigger proactive communications with customers. Contact center leaders should also determine the amount of outbound communications that's planned in order to ensure that inbound service levels continue to be met.

**5. Constructive approaches for delivering proactive service without coming off as being intrusive.** Companies can run the risk of coming off Big Brotherish when they extend offers to engage in different channels (e.g. web chat). Agents should always ask for permission to engage (“May I assist you?”) and offer a personal touch to give each outreach a human touch. Agents can also use information that a customer has freely shared with them in a survey or another interaction as a foot in the door to open the dialogue. Also, don't attempt to engage with a customer in a public arena such as Twitter or Facebook since this allows others to enter the discussion. Keep it 1to1.

### Giving the Go Ahead

There are certain instances, such as appointment reminders or notifications regarding service outages when customers welcome communications outreach.

“If a company or organization needs to get in touch with you for the following reasons, which method of communication would you prefer?”



Source: Ovum

## Beginning the Outbound Journey

“The cloud is better suited for the way that customers communicate today.”

—Kristyn Emenecker,  
Vice President of Product Marketing, *inContact*

Before companies can jump feet first into proactive service, they first must begin the transition from inbound-only communications to a blended contact center. It’s important for company leaders to recognize that making this transition represents a significant cultural shift from a completely reactive approach to serving customers to communicating proactively to customers with offers to assist.

This starts with how companies go about recruiting new agents. Among the necessary communication skills agents should exhibit, companies must also look at their ability to start a conversation and engage customers in specific channels (voice, chat, mobile).

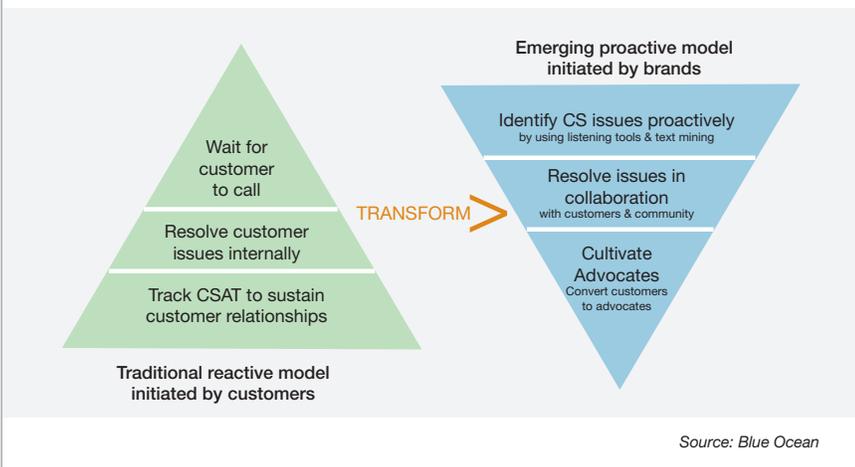
Goal-setting is also critical. This includes determining the amount of outbound communications the contact center plans to conduct and the objectives that it seeks to accomplish. Companies also need to identify the type of events that would trigger proactive communications with a customer.

A cloud-based outbound dialer solution can also help with the transition to a blended contact center since companies can use these services to synchronize between a sudden or anticipated drop-off in inbound customer traffic and scheduling agents to conduct outreach with an assigned customer set. Conversely, if inbound traffic begins to pick up and the hold queue reaches a certain level, outbound agents can then be re-directed to field inbound calls using the intelligence that’s built into the blended system, says Emenecker.

Of course, companies need a barometer to determine and measure success in the proactive service environment. The metrics used depend on what the organization is attempting to accomplish (an increase in upsell/cross-sell, a lift in customer satisfaction, and/or changes in customer lifetime value).

### Flipping the Customer Service Funnel

Proactive service represents a dramatically different approach to interacting with customers compared to traditional reactive service.



“Companies that reach out to their customers with helpful offers demonstrate that they have their customers’ best interests at heart.”

—Cheryl Nolan, Director,  
Peppers & Rogers Group

## Evolving Toward a Sales Center

A growing number of companies are recognizing opportunities for using the contact center as a conduit for driving additional revenue streams. Company executives are recognizing how customer interactions with the contact center represent meaningful opportunities for agents to engage with customers and make relevant offers when the timing and circumstances are right.

According to a survey of U.S. and U.K. executives conducted by Loudhouse Research, 69 percent of respondents view their contact centers as means for revenue generation.

Technologies can enable agents to act on the immediacy and context of engaging with a customer at the right time and with the right channel. For example, a customer who is browsing a company’s website for product information could be extended an offer to chat or click-to-call to answer any product questions she might have, says Waite. This type of engagement can lead to sales opportunities, depending on the direction of the discussion, the type of offer that’s extended, etc.

Since most agents aren’t trained sales professionals, it’s important for companies to focus on finding people with the right mix of engagement and communications skills who can be trained and coached to act on sales opportunities. It’s also important for contact center and sales leaders to give agents the leeway to offer solutions and make choices that fit the situation and provide the customer value, says Emenecker.

## Getting Started



### Adapting to Change

Proactive service can help contact centers address these top priorities as cited in a recent inContact/ICMI study, listed on a scale of 1 to 5 (with 5 being most important):

- Increasing customer satisfaction (3.86)
- Improving agent productivity (3.56)
- Increased sales and profitability (3.35)
- Lower operating costs (3.3)

Source: Survey of 500+ contact center leaders by inContact and ICMI

There will always be a need for companies to provide reactive service to address customer issues as they develop. However, by taking a proactive approach, companies can help to minimize the amount of reactive service they need to deliver to customers. This can help improve customer satisfaction while driving greater productivity in the contact center, in part, by reducing the amount of inbound traffic, says Waite.

Still, companies should plan a methodical approach for launching proactive service initiatives. “Companies shouldn’t expect to be able to go from zero to sixty in one day,” says Waite. “Start by gaining a thorough understanding of your customers’ needs and then begin delivering proactive services that are focused on meeting their top requirements,” Waite adds.

When companies do embark on the proactive services path, it’s important to communicate to customers why you’re offering them proactive services and what the benefit is to them. Doing so can open the customer relationship to a new

level of engagement.

“When you’re reaching out to the customer with an offer to help, it opens up opportunities for exploring and better understanding their needs and wants,” says Nolan. “It’s another way to engage with customers as your allies and to encourage them to become customer advocates.”

According to Nolan, proactive service can also be a godsend for agents who spend a great deal of their time dealing with irate customers. “This can provide a wave of relief to agents who are able to engage in more positive experiences that lead to greater customer satisfaction,” she says. Nolan adds that being involved with positive customer outcomes can lead to heightened job satisfaction and greater agent productivity.

Because it’s becoming more and more difficult for companies to distinguish their brands by price or products, service has become the true competitive differentiator. “Proactive service,” says Emenecker “is a way for companies to set themselves apart from the pack.”

**inContact** helps contact centers around the globe create profitable customer experiences through its powerful portfolio of cloud-based contact center software solutions. The company’s services and solutions enable contact centers to operate more efficiently, optimize the cost and quality of every customer interaction, create new pathways to profit, and ensure ongoing customer-centric business improvement and growth.

For more information, please visit [www.inContact.com](http://www.inContact.com)

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