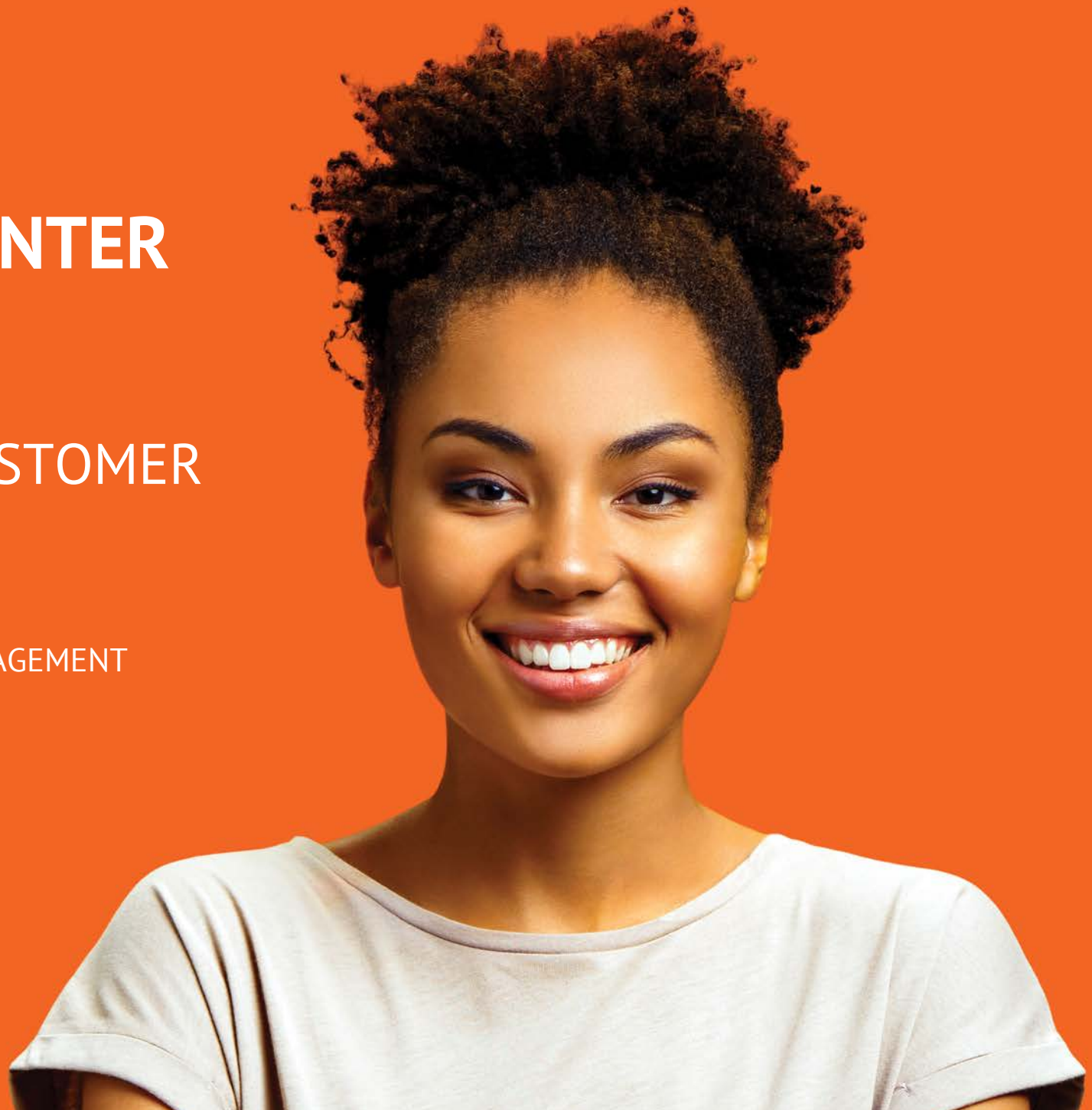


CONTACT CENTER 2020:

PREEMPTIVE CUSTOMER ENGAGEMENT

ANTICIPATING CUSTOMER
PROPENSITY PRIOR TO ENGAGEMENT

ACQUEON 



IN THIS eBOOK

01

INTRODUCTION

02

WHY DOES A PREEMPTIVE APPROACH
MATTER?

03

HOW TO SHIFT FROM REACTIVE TO
PROACTIVE CUSTOMER ENGAGEMENT?

04

HOW TO IMPLEMENT PREEMPTIVE
CUSTOMER ENGAGEMENT STRATEGIES?

05

CONCLUSION

01

INTRODUCTION

An era of anticipation & preemptive customer engagement

Historically, organizations relied on reactive customer engagement, as they lacked the right tools to truly know their customers nor provide a personalized end-to-end customer experience. But those days are over!

Reactive customer engagement does not work anymore in today's highly competitive digital landscape. Why? It's not only because running a reactive engagement strategy is both expensive and labor-intensive, but customers hate calling into organizations for help after the problems occur; instead, they want organizations to identify and resolve potential issues before they happen. In other words, customers want to be contacted proactively.

A survey conducted by NICE inContact found that 87% of customers wanted to be contacted proactively by a company when it comes to customer issues. Nearly 73% of those who were contacted proactively said that it led to a positive change in their perception of the business.

According to Enkata, a proactive customer service strategy can:

- Lower contact center operating costs by as much as 25%
- Boost customer retention by 3–5%
- Reduce inbound call volumes by 20-30% over 12-month period
- Open the door to successful upselling and cross-selling.

Therefore, to compete today, organizations must be able to understand their customers' preferences, [predict behavior](#), and one's propensity to buy, pay, and defect. It's all about being pre-emptive (proactive, predictive, and preventative). It's no longer enough to stand ready and available to service clients. This goes for both inbound and outbound communication. Companies that invest in proactive customer engagement and campaign management today will be primed for greater success in 2020 and beyond.



95% of customers are interested in some degree of proactive communication from companies they buy products and services from.

- Loyalty360

02

WHY DOES A PREEMPTIVE APPROACH MATTER?

Businesses that take a preemptive approach to customer engagement will better appeal to buyers, build stronger customer loyalty, and generate more revenue. Enkanta found that preemptive customer service increased retention rates between 3-5%. Whether a customer is contacting the contact center or being reached through outbound dialing/chat, the ability to anticipate buyer intent and propensity and understand situational context is key to maximizing the potential of every interaction.

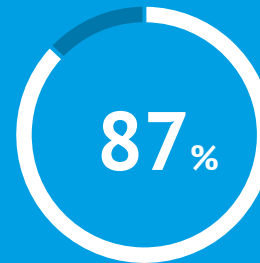
Suppose an agent calls a customer blindly to upsell them without [understanding his/her history](#) Let's assume this particular buyer recently called in to downgrade their service plan due to a recent job loss. How foolish would the agent look by making this call? Proactive list scrubbing by a campaign orchestration solution would have eliminated this phone number, and this individual would never have been contacted.

Similarly, what if a customer contacted Support three times via online chat and twice via telephone to remedy their issue but still didn't resolve it? A proactive customer engagement solution with customer effort scoring would flag this buyer as a potential defector so the customer service team could immediately contact him/her before churning.



of customers have higher expectations for customer service today compared to one year ago. This percentage jumps to 66% for consumers age 18 to 34 years old.

- Microsoft



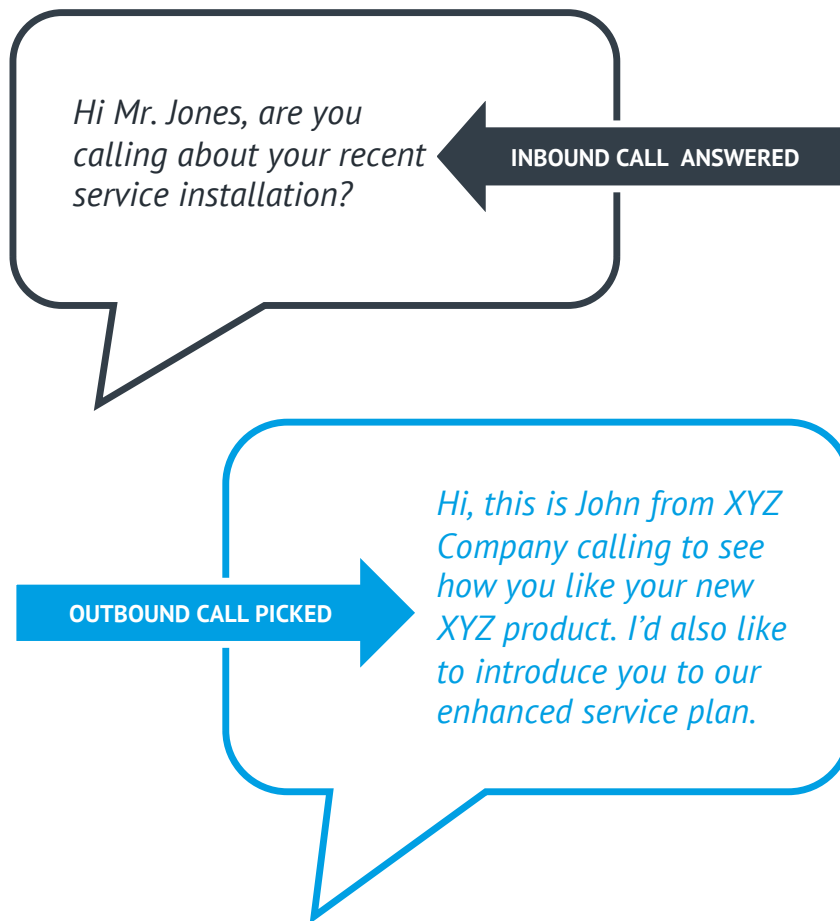
of organizations agree traditional customer experiences no longer satisfy customers.

- Accenture

“A moderate improvement in customer experience (CX) would impact the revenue of a typical \$1 billion company an average of \$775 million over three years.”

- Temkin Group

Personalization is another important factor in proactive engagement. When an inbound call is answered by an agent or an outbound call is picked up by a customer, personalization of the greeting and contextual awareness of the situation/customer journey matters.



Here's how preemptive customer engagement can benefit your business:

- Acquire new customers:**
By being proactive, you can attract prospective customers, and encourage them to switch to your brand/products.
- Retain existing customers:**
Proactive customer engagement allows you to identify at-risk customers and rescue them before they churn.
- Create advocates:**
Proactive customer engagement offers an opportunity to not only turn around unhappy customers but transform them into brand advocates. As happy customers, they will tell at least three people about their positive experience.

“Consumers want the companies they buy from to know who they are and what they’ve purchased, so they don’t have to spend time explaining their history all over again when they reach out with a question.”

03

HOW TO SHIFT FROM REACTIVE TO PROACTIVE CUSTOMER ENGAGEMENT

Companies across virtually every industry are sitting on mountains of data about their customers, which could be leveraged to provide preemptive service. It all starts with data liberation – freeing this data from its siloes so it can be analyzed and utilized to identify propensities and then acted upon to maximize sales, marketing, and service opportunities. A unified communications strategy is also required to pull data from (and communicate via) different channels.

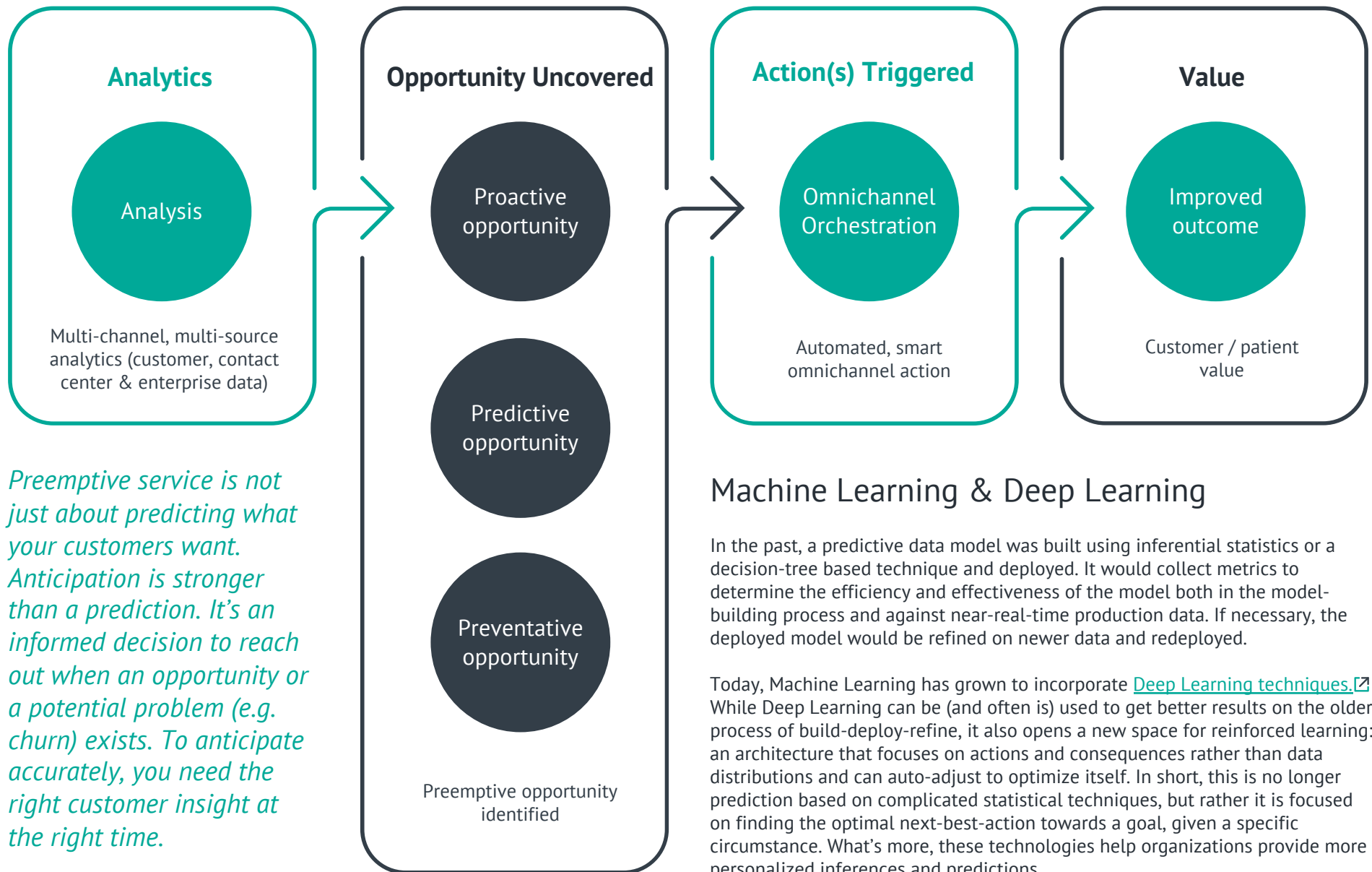
The intelligence an enterprise could then uncover would help connect its last mile of content delivery and communication with customers to its sales, marketing, finance, and customer retention departments. This would lead to increased sales, CSAT scores, and customer loyalty.

Much of the issue today is that a lot of this data lies in siloed containers, and different departments rely on disparate technology and data models. Marketing teams, for instance, rely on CRM data to uncover sales opportunities. Customer retention teams rely on post-call survey data to identify at-risk customers. But what if these siloed data containers were combined, along with a proactive engagement solution featuring a campaign orchestration layer?

Imagine the power of having a centralized data repository that aggregated and analyzed interaction, transaction, emotion, and enterprise data simultaneously. The rich insight you would uncover could be a game-changer in terms of revenue generation and customer satisfaction.

Suppose a customer provides a high CSAT feedback score in his/her post-call survey. A centralized proactive engagement solution will combine that information with the customer's purchase history and interaction journey analytics to determine if this person is primed for an upsell. The solution's campaign orchestration tool would automatically trigger, for example, an SMS (based on the customer's channel of choice) at Noon on Thursday (based on the customer's preferred time to connect) introducing an ancillary product that enhances the purchase he/she recently made. This specific data-driven proactive engagement would have a higher likelihood of succeeding.

Preemptive Engagement Model



04

HOW TO IMPLEMENT PREEMPTIVE CUSTOMER ENGAGEMENT STRATEGIES

Opportunities Gained, Customer Loyalty, Patient Safety

Proactive outreach can take many forms in business today. A healthcare organization can send a patient a reminder to visit the doctor or to get a prescription refill. A mortgage company can notify a customer of an overdue payment and an impending penalty. An agent can call a telco customer on Tuesday at 3:15 p.m. CT on the individual's landline and successfully reach him/her to offer high-speed internet. Or a bank can connect with a customer live over chat to discuss fraudulent charges.

The point here is that business-consumer outreach has evolved to the point where an organization can perform certain pre-determined, recommended actions (and proactively communicate promotions and upsell offers) based on specific customer profiles and past transaction patterns and turn that intelligence into real value for the organization and the customer.

Customers Would Like a Proactive Notification When...



My account is going below a minimum



Price for outgoing services is changing




My contract is ending

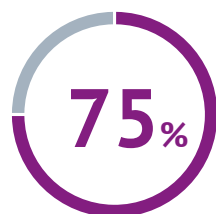



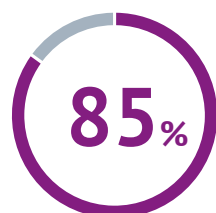
Update me when buying a new product or service


The Digital Customer 2017, BT Global Services / Cisco / Davies Hickman Partners

Various new technologies and capabilities make this all possible, such as:

- [Next Best Action](#) 
 - Next Best Offer
 - Best Time to Contact
 - Channel of Choice or Auto-switch to different channels of communication
 - Intelligent backend processing
- The system can proactively request the new expiry date on the card in order to update the records and proceed with the transaction.
 - The status of the delivery is also proactively communicated, and if required, the delivery or pickup time can be scheduled with the customer via SMS itself.

 **75%** of consumers are more likely to purchase if a company provides [personalized recommendations](#) 

 **85%** of consumers are interested in receiving proactive notifications.

 **90%** say they're more likely to do business with a company that sends reminders.

Use Case Examples

Online Scheduling:

A first-time patient schedules an appointment with a new primary care physician. After submitting the online appointment request, the patient receives an email with an attached PDF, including all the forms he or she will need to provide at the appointment. This will expedite the appointment and allow practices to operate more efficiently, thereby allowing them to see more patients in a day.

As the healthcare industry transitions from a fee-for-service model to a fee-for-value/results model, preventative services are becoming largely accepted. Doctors and insurance providers are also ensuring customers take advantage of services such as check-ups, flu shots, and mammograms. With a proactive patient engagement strategy spanning multiple channels, healthcare providers can market these services more effectively and drive increased patient appointments.

Push Notifications:

An auto insurance company prepares an online "What to do in Case of an Accident" kit and texts the link to all clients. One individual gets into an accident and isn't sure who was at fault because he was the middle car in a three-car accident. He searches through his texts, and pulls up the message, opens the kit, and learns that the driver of the car in the back is at fault for all three vehicles. This knowledge results in the insurance company for the driver of the back car paying for his damages.

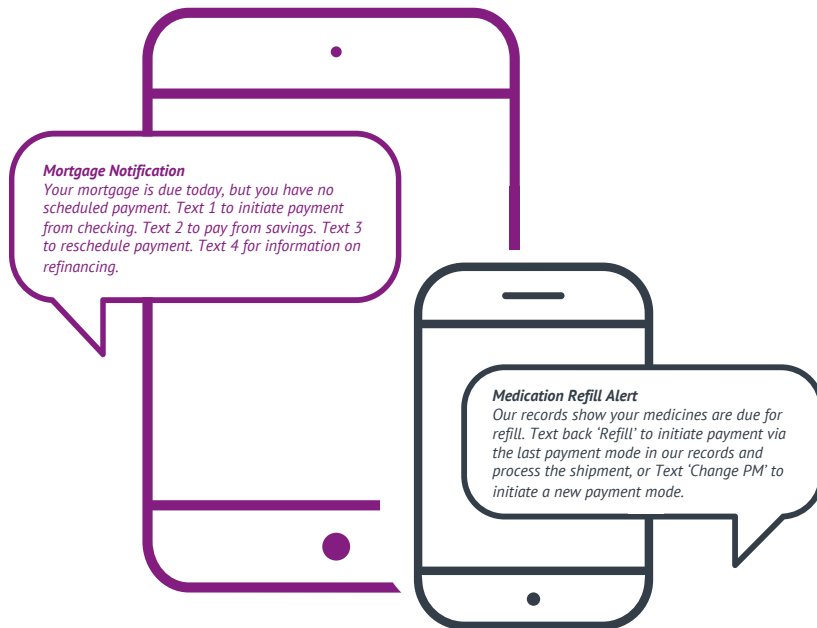
Without this information on hand, the client may have submitted his claim to his own insurance company without ever capturing the back driver's insurance information. His own insurance company would have to cover the damages, and his premium would likely go up.

Proactive Reminders (Omnichannel)

Text Messages

Many customer questions are easy to anticipate and address with simple proactive text notifications, such as

- Appointment reminders
- Payment reminders
- Shipping status updates
- Delivery confirmations
- Inventory updates
- Applications or claim status updates
- Post-service surveys
- Fraud alerts



Chat Message

A recent study from Twilio showed that nine out of 10 consumers said they want to be able to use messaging to talk to businesses. Live chat is a messaging application that allows existing and prospective customers to talk to your company in real-time via your website or messaging apps like WhatsApp.

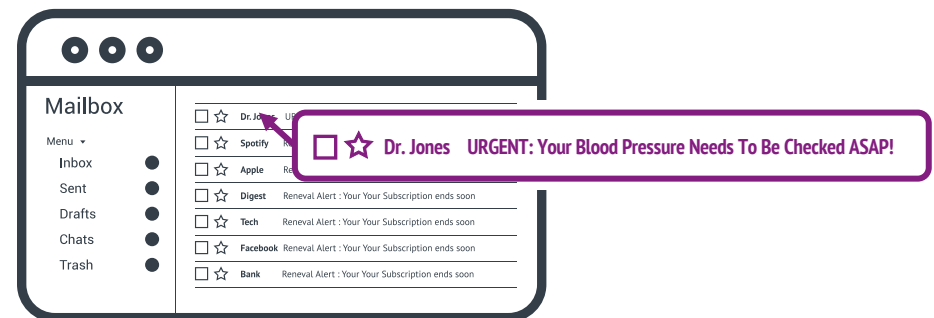
With proactive live chat, Tradeshift (U.S. based cloud services provider) increased sales opportunities by 32%.

By using live chat software instead of forms, Copper (U.S. software company) saw a 13% increase in capturing lead details.

After replacing its support forum with a live chat system, put.io (Istanbul-based web company) reduced churn by 14%.

Email Message

British utility company, Anglian Water, sends more than 200,000 emails to their customers every year to notify them of outages and problems in their area. By doing so, the business dramatically reduces incoming customer calls. Through this single initiative, the company has reported savings between £100,000 and £200,000 in contact center costs every year!

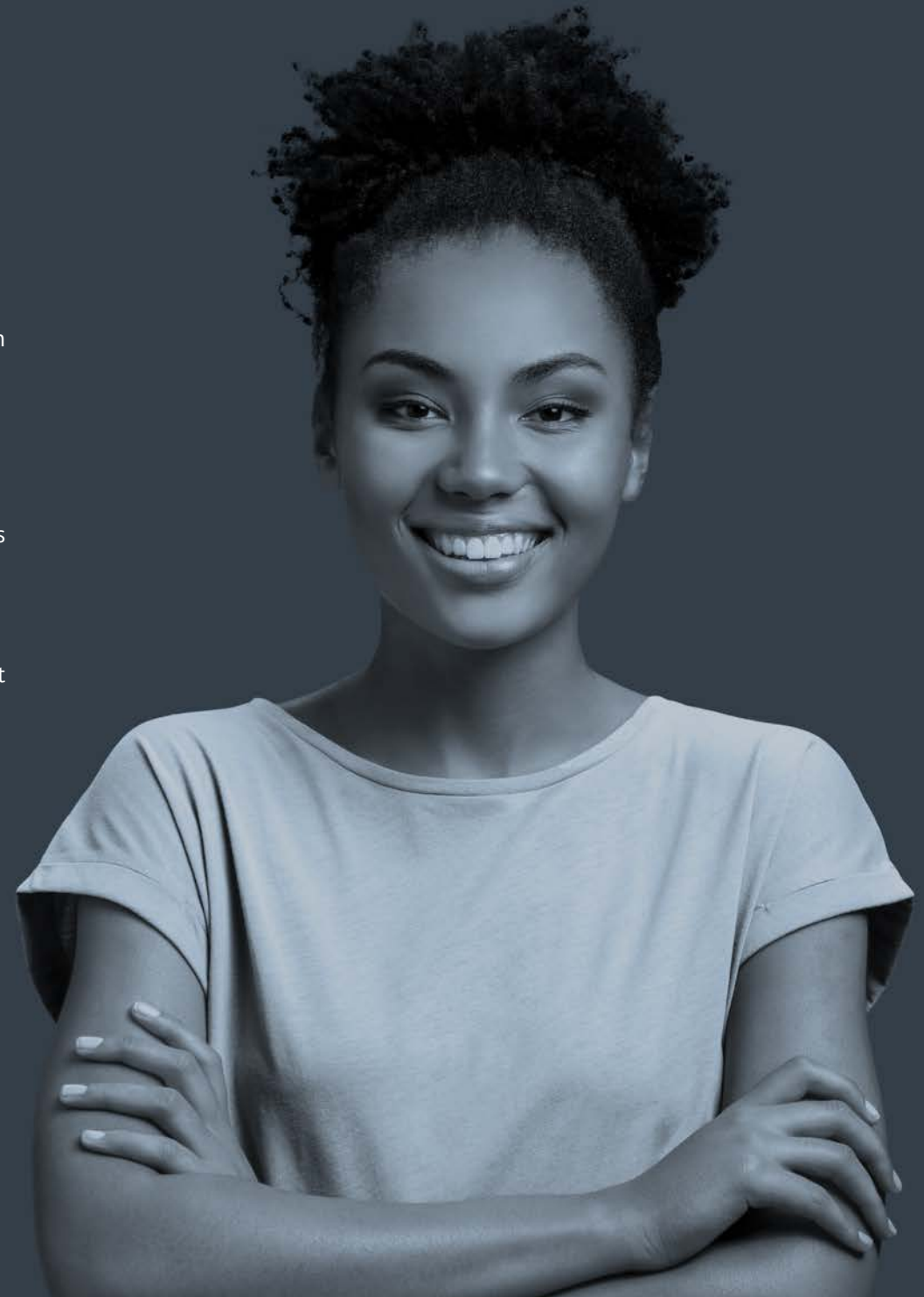


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CONCLUSION

Preemptive engagement capabilities don't only come from expensive, big-data solutions. A simple data aggregation solution, for example, can be used for proactive engagement and notification. In fact, 50-60% of cases/scenarios within a contact center can be optimized/remedied through common-sense engagement rules and a [campaign orchestration](#) layer.

The future of customer engagement looks to be very exciting. Already, technologies like the Internet of Things (IoT), geofencing, and RFID tags are capturing data points that can be aggregated and analyzed along with other engagement-related information to anticipate opportunities and trigger actions further. The biggest call to action, however, centers on the idea that data must be liberated, analyzed, and acted-upon if an organization wants to maximize the potential of every customer/patient relationship.



ACQUEON 

Conversational Engagement

For more information, please contact marketing@acqueon.com
+1 (609) 987-0044 (North America/Europe)
+91 44 4221-8294 (APAC/MEA)

www.acqueon.com

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