Take a second to reflect on some of your favorite brands. Is it Starbucks whose baristas always remember your name? Or maybe Amazon or Apple, both of which have continually ranked highly for customer experience. One of our favorites is Zappos, the online shoe retailer that is known to go above and beyond for their customers. But how do you go about creating a customer experience strategy that emulates these retail giants in a way that works for your own customers?

At Blue Ocean, we're all about metrics. We measure, measure, measure until we're sure our agents are delivering the best call center outsourcing service for our clients' requirements – and we have the data to back it up. But beyond average handle times, wait times, first resolution ratios and other equally valuable KPIs, we recognize that data doesn't always reveal the whole picture of customer experience.

The customer experience is built on highly intangible factors; namely, emotion and human interaction. As such, no matter which KPIs we choose to analyze, we're essentially trying to measure the immeasurable. It means that we could be following workflow process to a T and consistently hitting green on the contracted service level, but this doesn't necessarily tell you much about the quality of the customer experience. It's somewhat of a Catch-22 that's worthy of much more discussion.

Workflow Process vs. Customer Experience

Customer service workflow process is designed to achieve the best possible resolution in the most efficient manner. A formalized workflow process ensures consistency across all contacts and generates predictable responses that enable the agent to better assist the customer. Typically, good agents are highly process-driven. They're the ones whose habits and behaviors most directly impact service level KPIs on a consistent basis.

However, being process-driven can be both a strength and a weakness. Process-driven people are more likely to be blindsided by scenarios where the customer pushes the conversation outside of the typical workflow. These situations call for effective decision-making on the part of the agent in a way that enhances the customer experience while mitigating risk for the client – pretty high stakes. Even in ordinary customer care scenarios, we need to be constantly thinking outside of the process and asking, *what else can we be doing?* and *how can we be serving this customer better?*

A Real Life Example in Customer Experience

Let's look at an example in the roadside assistance field. Agents are trained to ask a very specific set of questions, including membership account number, phone and address, before launching into the driver's current situation and location. Many roadside assistance calls are from customers who have broken down with car trouble, flat tires, or an empty gas tank; others have locked their keys in their car or have lost their way on rural highways or one-way city streets.

But what about a frantic mother whose auto club membership expired just last week calling in the middle of winter from a broken down car, with no heat, and a baby in the backseat? She's hoping someone will help in spite of her lapsed account. Stringently following the workflow checklist in this scenario probably isn't the best way to meet this customer's needs. She needs more than process – in this case, our agent is quite literally her lifeline. That mother needs someone to take action quickly and she needs to *feel* that she is being taken care of with urgency and compassion in equal measure. To make that happen, the agent needs to know when and how to go outside the box and has to know what parts of the process to follow strictly to ensure no errors are made and help arrives quickly.

Customer experience strategy in this instance requires that we empower our agents to make a real difference in customers' lives. Each of our clients has its own brand, their own unique agent profile, and, therefore, their own individualized customer experience strategy to ensure we're truly reaching their customers at the right level.

The Workflow of Customer Experience

Ultimately, a formalized workflow process is all about risk mitigation. It helps to guarantee a smooth process that leads to an efficient, effective resolution. On the other hand, a greater focus on customer experience ensures that we're making the best possible decision for each individual customer This renewed focus depends upon understanding the unique perspective of each consumer and establishing rapport with the customer on every single call. Achieving this delicate balance between workflow process and customer experience can be incredibly challenging.

Creating a blueprint that maps an ideal customer experience is an excellent starting point. Understanding the components that contribute to a loyalty-building customer experience helps our agents and our coaches evaluate customer contacts in way that straight process can't capture. Our call center coaches ask each agent to self-evaluate on their perception of how the customer would rate the service experience, how the client would rate their communication style in relation to the brand, and how the client would rate the overall customer experience. This evaluation allows the agent to self-identify if and where there may be opportunities to create a stronger, more positive customer experience, so we can work towards a resolution.

Essentially, creating a blueprint for the customer experience is the starting point for measuring the immeasurable. Understanding what kind of experience results in long-term loyalty and understanding how to build that experience through communication, efficiency, empathy, and problem-solving helps agents make better decisions. When individual agents make good decisions for individual customers, you can see the results positively reflected

in Net Promoter Score trends and Customer Satisfaction trends. And if you're not seeing positive trends, you can more easily identify and address any gaps in processes and service.

What's Your Customer Experience Strategy?

To return to Zappos, our favorite example of customer experience strategy, they are committed to wowing their customers, measuring the results with a 100-point "happiness experience form." Like us, they try to sustain customer loyalty even when call volume spikes. In fact, one of their longest recorded calls was eight hours!

Ultimately, our goal is to discover the perfect balance between differentiated customer experience and high-value metrics that optimize the efficiency and effectiveness of our agents.