

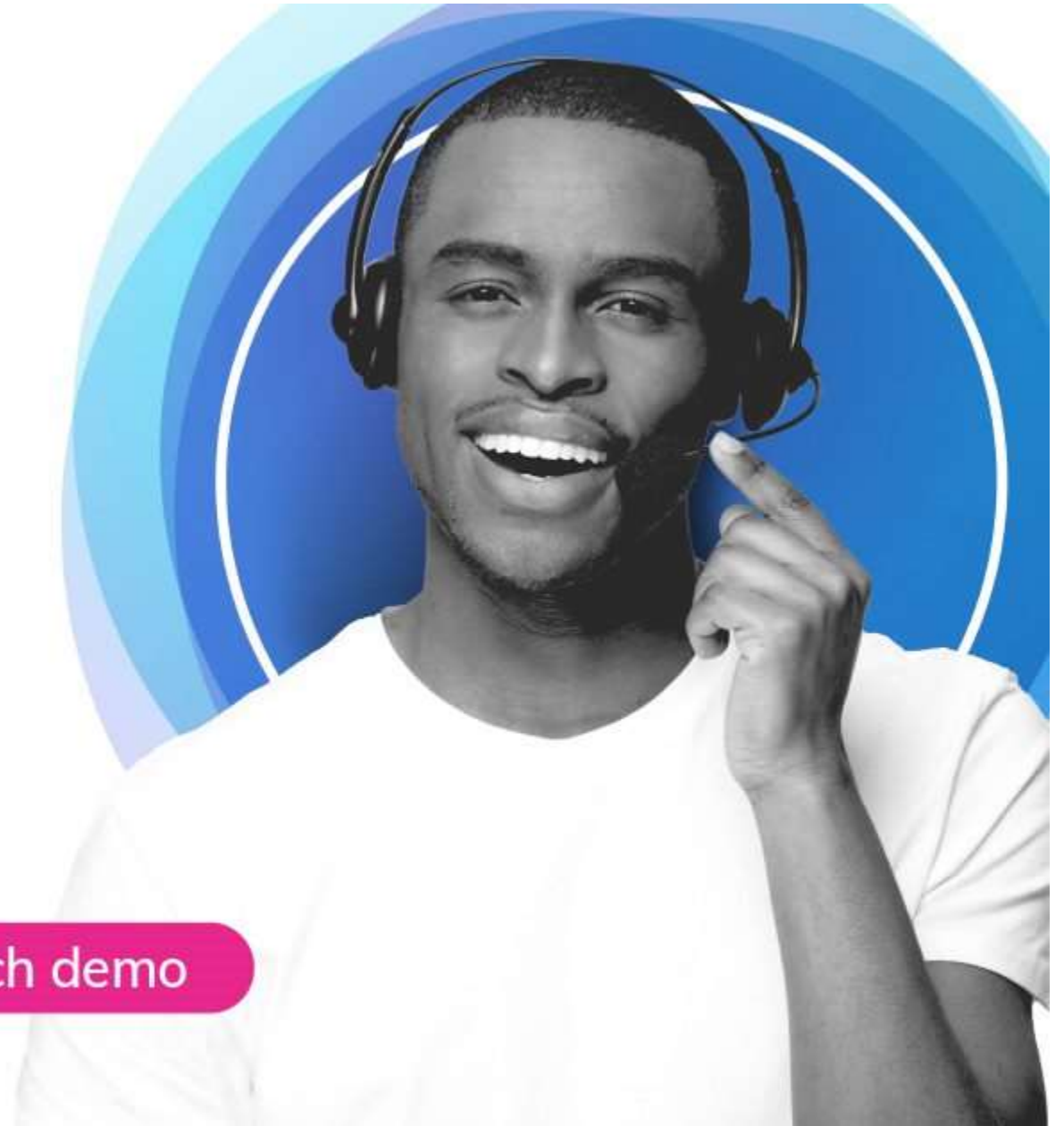


Goodwill Industries of San Antonio Business Services cut costs by 25% with CXone.

Source: Goodwill Industries of San Antonio Business Services

What can proven cloud contact
center software do for you?

[Watch demo](#)



About the Session

NICE CXone provides these kick-off materials for your use with your staff and stakeholders. It is designed to last approximately 60-75 minutes, depending on the number of participants and the depth of discussion.

The kickoff can be delivered either in person or virtually. Activities sometimes have to be slightly modified depending on the delivery mode, but instructions are in the speaker's notes.

The **ideal number of participants** is 12-18 people. This allows for interactions without it becoming too unwieldy. A smaller group limits the participant interactions and puts pressure on a smaller number of people. A larger group may limit the amount of participant interaction simply because of space, time, noise, and other factors. But any number of participants is doable with this material.

A **Workbook** is provided. Print these out (black and white printing is fine) or email them to participants to print themselves. This serves as a record that participants can customize and keep as a reminder of the content for later reference. Encourage people to mark it up and truly make it their own. Note that in the upper right corner of each slide is the corresponding Workbook page number so participants can easily re-orient themselves when necessary.

Activity should begin as soon as participants enter the room (in person or virtually). This tells people that the session is participatory and starts to get them engaged immediately. The first slide (slide 5 in this file) gives instructions for what they should do once they get settled. Be sure to circulate and talk to people, learning who they are and personally welcoming them as they complete the pre-session activity.

PRINTING THE LEADER'S GUIDE

The Leader's Guide is the Notes view of this PowerPoint file. The first 4 pages are instructions for the trainer and are hidden from presentation. You can print these pages in slide view to make them easier to read. For the rest of the PowerPoint file, print the Notes pages so that you will have a thumbnail of the slide with speakers notes beneath.

AUDIENCE AND PURPOSE

Who should be a participant: Transformation will affect some individuals more than others, and the committed participation of these key people will have more of an effect on the outcome. The leaders responsible for various parts of the customer journey and IT are critical partners to include.

Why it's important to gain stakeholder alignment: The Contact Center is no longer a touchpoint on the customer journey—it's the hub of customer experience. Accordingly, any transformation to the contact center is risk and impact that will echo throughout the full business, organization-wide and top-to-bottom deep.

Transformation in the contact center can only be accomplished through the efforts of stakeholders throughout the organization. The stakeholders must be moving in the same direction, guided by shared vision and strategy. Awareness, acceptance, and advocacy need to flow from the top of the organization to the front-line agents to accomplish success.

Continued

How to ensure alignment: For contact center leaders facing change initiatives, customer outcomes will act as a compass that keeps every department in our company aligned on the same goal. Often, the ‘why’ is the heart of our customer experience strategy—or the best possible end-to-end customer journey for our company.

Taking an honest look at where your company stands, and how capable or ready you are for your initiative can help you plan appropriately for the endurance it might require.

PREPARING TO LEAD THE SESSION

Go through all of the materials and customize the content for your company, especially in the section “Our Plan for Digital Transformation,” slides 16-31.

The **key factors for success** in the session are how comfortable you are with the material and inserting personal stories to help illustrate the content.

To get comfortable with the material, plan to start preparing at least one week ahead of time.

- Read through the speaker’s notes a number of times over the first couple of days, including the customizations you have made for your company.
- Make notes of stories you could add and points you want to emphasize.
- Do NOT plan to read the speaker’s notes word-for-word. The notes provide background information for the presenter to make sure you are comfortable with all of the content.

- You also do not have to cover every bullet on every slide, and participants certainly don’t need you to read to them. For each concept, you can say here are some things you can do to support this concept, and then just highlight 2-3 of them. Or you can ask participants to look down the list and choose 1-2 they want to discuss. All of the points are in the Participant Workbook, so everyone has a record of them for reference.
- After you have read through all of the notes several times and made your own notations, practice with your own words, adding your stories. Do this at least once a day for several days ahead of time until you can deliver the entire workshop smoothly and confidently.

DURING THE SESSION

- **Relax and enjoy the experience.** You've done your preparation, you know the content, so now it is time to enjoy the final product – the delivery of the kickoff.
- **Be aware of your time.** Because you want to encourage participation, questions, and discussion, watch out for “rabbit holes” that become a whole session in themselves. .
- **Encourage participation.** Virtually, let participants turn on their microphones and talk from time to time. Both in person and virtually, ask what participants think or if they would add anything to the content. Many will already have experience with the topic and will have good points to contribute. Additionally, dealing with participants' questions as you go along helps to customize each session to the people who are present.
- **Tell stories.** Stories help make points clearer and help increase engagement. You want to tell personal stories and customer stories that are short and to the point. A five-minute story has to be really gripping to keep people's attention, but a short 30 second story can help clarify the content and keep people engaged.

AFTER THE SESSION

- Thank everyone for their input into and support of the contact center's transformation.
- Distribute the “Help us understand” survey (slide 41) and ask them to respond within one week (or less).
- Include a link to NICE's *Change Management Blueprint for Contact Center Digital Transformation* [LINK] for further information.

Workshop Overview

Topic	Activity	Time Allotted	Materials
Introduction	Opening Activity Presentation Amazing CX	5 min 1 min 4-7 min	PPT 5, PW 3 PPT 6-7, PW 4 PPT 8, PW 3
What is DCX?	Presentation Discussion	6 min 3-6 min	PPT 9-14, PW 5-6 PPT 15
Our Plan for Digital Transformation	Presentation with discussion Nudge Your Neighbor Presentation Nudge Your Neighbor	9-18 min 1 min 5 min 1 min	PPT 16-24; PW 7-8 PPT 25 PPT 26-30; PW 8-9 PPT 31
Training the Digital Agent	Presentation Nudge Your Neighbor	7 min 1 min	PPT 28-31; PW 9 PPT 32
Close	Review Discussion Final Comments Evaluation	6 min 5-10 min 1 min	PPT 34-36 PPT 37; PPT 10

Total Time = 55-75 min

PPT = PowerPoint Slide

PW = Participant Workbook

Welcome!

As soon as you get settled, start answering these questions in your workbook. Then share your answers with those sitting near you.

When was the last time you had an **amazing customer experience?**

- Why did you contact the company?
- What channel(s) did you use to communicate with the company?
- How easy was it for you to get the information you needed?
- How long did it take?
- How did the experience make you feel?



Contact Center Transformation

Stakeholder Kickoff

Session Goal and Agenda

The **goal** of this session is to align on the process involved in digital transformation and to begin thinking about the opportunity we have to improve our digital customer experience.

- ⦿ Introduction
- What is DCX?
- Our Plan for Digital Transformation
- Training the Digital Agent
- Close

Amazing Customer Experiences



What is Digital Customer Experience?

Digital Customer Experience

DCX is the sum total of all the online interactions a customer has with your brand.



Sample channels:

- Your website
- Live chat and email
- Mobile apps
- Social media channels (Facebook, Twitter, Instagram, etc.)
- Text messages/SMS
- Digital kiosks and Internet-of-Things (IoT) hardware
- Desktop and Software-as-a-Service software
- Self-service

DCX and CX



Fundamental Ingredients to Good DCX



Did the customer complete their task and achieve their goal?

Was the process smooth and easy?

Did they come away from the interaction feeling good?

Why Emotion Matters

67%

Will pay more
for a great
experience



Customers who have an
emotional connection with a
brand:

304% Higher lifetime
value

71% More likely to
recommend
our brand

Source: Sitecore

Why Digital Matters

56%

Of CEOs said digital improvements led to revenue growth

10%

Greater online spend for multi-channel customers

Source: Delighted Team



What Do You Think?

Thinking back on the amazing customer experience that you noted at the beginning of the session and what we have discussed about digital customer experiences:

What do you think the 3 biggest improvement opportunities are for our customer experience?

Our Plan for Digital Transformation

Steps for an Effective Digital Transformation

1. Prepare for change
2. Build a coalition and establish partnerships
3. Align technology to transformation goals
4. Establish and implement change plans
5. Measure and improve

1. Prepare for Change

- Define vision
- Assess maturity
- Analyze impact

To assess maturity

Reflect on our current state and the key changes needed in each of the following areas:

- Customers
- Employees
- Operations
- Data
- Technology

Assess Maturity: Customers

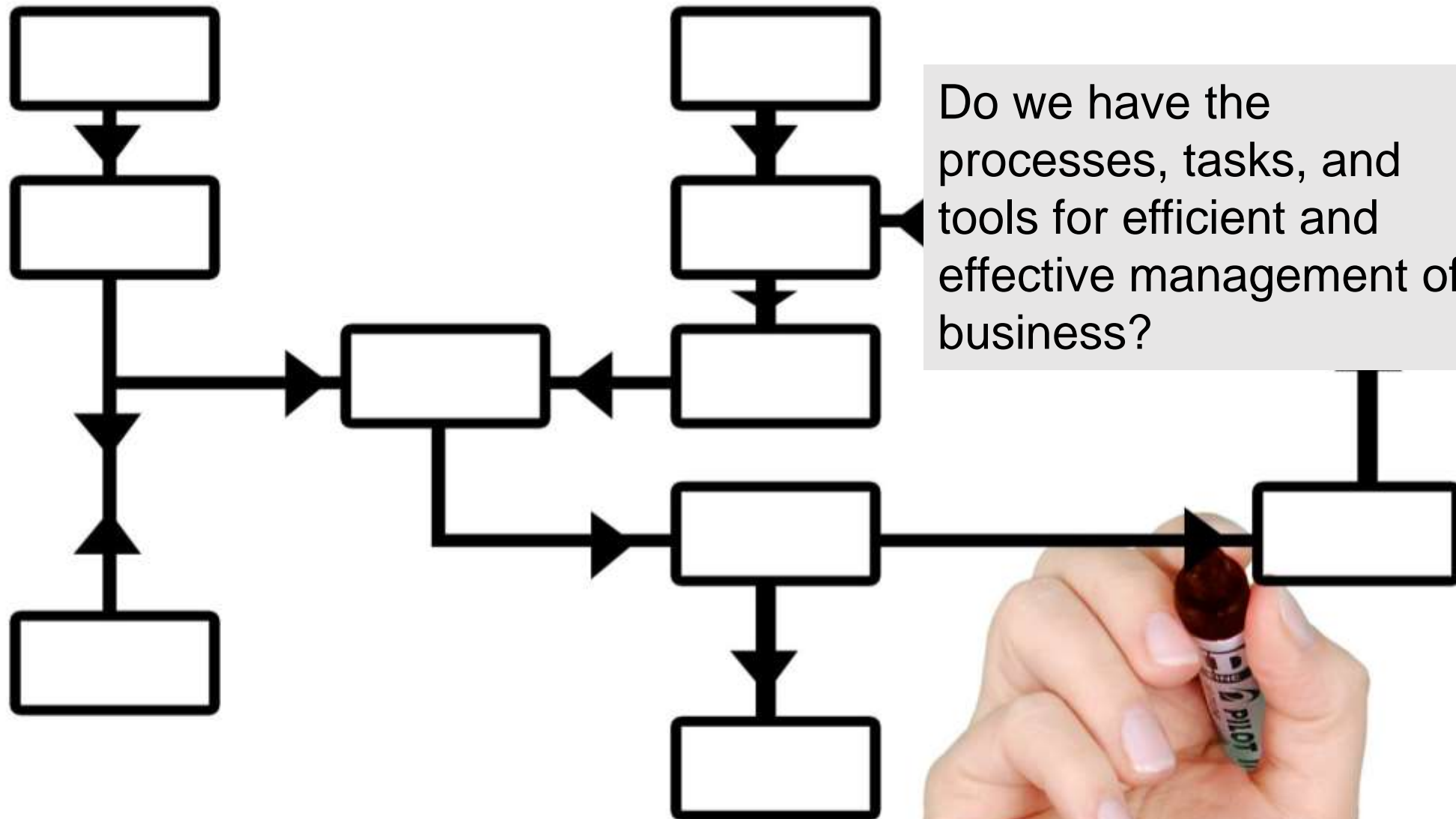
Do we have the experience and channels in place to support the customer's expectations?



Assess Maturity: Employees

Are we appropriately staffed to support changing volume, with the right skills and training?





Assess Maturity: Operations

Assess Maturity: Data

Can we easily access and pull reports of data and metrics to assess trends, strategize improvements, and maximize business value or customer outcomes?



Assess Maturity: Technology

Do we have the right stack of technology and integrations that support seamless customer and employee experience, operational and data requirements?

Nudge Your Neighbor

Take 30 seconds to tell someone near you how ready you think our organization is for digital transformation and why you think that.



2. Build a Coalition and Establish Partnerships

- Executive sponsors
- The role of stakeholders
- Partnership with IT



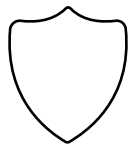
3. Align Technology to Transformation Goals



- Adopt a cloud infrastructure



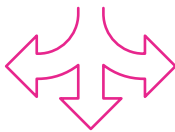
- Self-service



- Implement a cybersecurity strategy



- Artificial intelligence and machine learning



- Use an omnichannel platform

The Importance of Omnichannel

Assess your current channels:

- Do they all provide an engaging experience for customers?
- Are there channels that customers prefer that are not being offered?
- Are there channels that customers are not using?

4. Establish and Implement Change Plans





5. Measure and Improve

Nudge Your Neighbor

Take 30 seconds to tell someone near you one important consideration that you see for your organization in measuring the success of your digital transformation.



Training the Digital Agent

Important Elements to Customers

- Fast and easy resolutions
- Finding answers at any time
- Interacting with a friendly and empathetic person
- Getting help by my chosen channel
- Not having to repeat myself



Top Skills for DCX

- Empathy
- Speed
- Attentiveness
- Written communication
- Social skills



Onboarding New DCX Agents

- Know what you want to accomplish
- Teach them to work across channels
- Teach digital media etiquette
- Provide knowledge and resources
- Create a feedback mechanism

Nudge Your Neighbor

Take 30 seconds to tell someone near you one thing you most want to remember about onboarding and training new digital customer service agents.



Close

What is Digital Customer Experience?

DCX is the sum total of all the online interactions a customer has with your brand.



Fundamental Ingredients to Good DCX



Did the customer complete their task and achieve their goal?

Was the process smooth and easy?

Did they come away from the interaction feeling good?

Why Emotion Matters



Why Digital Matters



Our Digital Plans

To assess maturity

Reflect on our current state and the key changes following areas:

- Customers
- Employees
- Operations
- Data
- Technology

Steps for an Effective Digital Transformation

1. Prepare for change
2. Build coalition and establish partnerships
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4. Establish and implement change plans
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The Importance of Omnichannel

Training the Digital Agent

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Top Skills for DCX

- Empathy
- Speed
- Attentiveness
- Written communication
- Social skills

Onboarding new DCX agents

- Know what you want to accomplish
- Teach them to work across channels
- Teach digital media etiquette
- Provide knowledge and resources
- Create a feedback mechanism

Help us understand

- Given all focus areas and priorities, with 1 being – “high priority we need to change to survive” and 5 being “I support it, but I don’t think we’re ready yet” – how important is digital customer experience to you?
- Why is evaluating and making a change to the customer experience important to you?
- What are the three critical goals and/or metrics you care about?
- What is your biggest challenge we should be solving for or that we should keep in mind as we transform?
- Where do you see the biggest impact that we need to account for (impacted teams, process changes, areas of potential resistance, etc.)?



Contact Center Transformation

Stakeholder Kickoff

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<https://www.niceincontact.com/>

Developed by Elaine Carr and Laura Grimes
of Harrington Consulting Group
(<https://www.harringtonconsulting.us/>)



Speaker Notes – Slide 6

This slide should be displayed as people are arriving for the training.

If you are presenting virtually: Be sure to turn on your camera. They can share their answers in chat.

If you are conducting the workshop in person: Be sure to circulate and encourage people to share their experiences with others in their table group or sitting nearby. Encourage the conversations.

Speaker Notes – Slide 8

In the next hour, we are going to do a high-level overview of what digital customer experiences (DCX) is all about. We want to align on what digital transformation means and begin thinking about how we can use this opportunity to improve our digital customer experience.

Speaker Notes – Slide 9

Debrief of Opening Exercise

[Note: There's not enough time to go around to each person and have them share their stories, so resist that temptation!]

Let's go back and revisit the stories of amazing customer experiences that you shared with each other. We are going to focus on how those experiences made you feel. *Have people call out words describing how the amazing experiences made them feel, jotting these words on a flip chart or whiteboard (virtually – on a whiteboard slide).*

Isn't this exactly how you want your customers to feel when they interact with your organization? Of the three fundamental ingredients to a good digital customer experience (which we will go into shortly), Emotion is the most powerful and important. 92% of people who gave a high score for "emotion" said they were likely to purchase more from that company. [Source: XM Institute]

As we go through the content of this session, keep these emotions in mind and how you can help our customers have amazing digital experiences.

Speaker Notes – Slide 10

Let's begin now with making sure we all have the same understanding of DCX.

Speaker Notes – Slide 11

The definition of DCX is really quite simple – the sum total of all the online interactions a customer has with our brand. This may start with our company website but might also include mobile apps, chat, email, social media, text messaging, and any other channels where the customer touchpoint is virtual.

Speaker Notes – Slide 12

If you are wondering how digital customer experience fits with customer experience, envision them as two nesting dolls. DCX is the slightly smaller doll that fits within the larger doll of CX which includes all of our customer touchpoints, including store and other interactions in the physical world. DCX includes all of the elements important to a good CX journey (empathy, human connection, trust, etc.), but in their online expressions.

It is important to remember that while we might differentiate between CX and DCX, customers don't think in these terms. For them, whether the interaction is physical or virtual, offline or online, it is all the same to them. It's all one experience with your brand.

Speaker Notes – Slide 13

As referenced early, there are three fundamental ingredients to good digital customer experiences: Success, Effort, and Emotion. Obviously the first two impact the third. And which is most important? <pause> #3 – Emotion. Emotion has a far bigger affect on whether the customer will continue doing business with our company, but it is often the thing we pay least attention to. It's a little harder to measure than success and effort, but it's far more influential.

Digital customer experience management focuses on being aware of the digital touchpoints we share with our customers across platforms and continually improving the experience our customers have within and in-between those touchpoints.

Speaker Notes – Slide 14

Experiences that spark powerful emotions shape buying patterns and brand loyalty, as seen in these statistics. As the move toward an all-digital world accelerates, the majority of customer experiences will be delivered through online channels, where it's more difficult to gauge sentiment and interpret reactions.

Speaker Notes – Slide 15

And here are a few stats to support why digital matters. Even in-store, multi-channel customers spent 4% more than single-channel customers. For every additional channel they use, customers spend more money.

To stay ahead of the curve and reap the rewards, we will need a deliberate strategy for measuring and improving digital customer experiences.

The perception of customer service is quickly changing. While they were once viewed as a cost center, contact centers are increasingly being seen as a value-add for those brands that invest in a digital strategy and staff to empower every employee to deliver consistently satisfying service and information across channels.

Speaker Notes – Slide 16

Have each participant first write down a few improvement areas in the workbook, and then ask them to share with the entire group. Make a list of the biggest improvement areas on a flipchart or whiteboard or virtual whiteboard .

Speaker Notes – Slide 17

Now, let's look at ingredients for creating an effective strategy for DCX.

Speaker Notes – Slide 18

Here are the steps we are going to take in completing this digital transformation.

As you go through the steps in the next few slides, expand the content to include your specific plans and strategy for completing the contact center digital transformation.

Speaker Notes – Slide 19

Our digital strategy does not exist in isolation but needs to be aligned with our organization's overall mission, vision, and strategy. If it does not, we will not be able to get the support and funding needed to transform the customer experience to digital, which will likely lead to an erosion of our customer base. Be crystal clear on how a digital strategy supports the overall organization.

Defining the vision also means that we define the vision of what the digital transformation means for us as an organization, our readiness and commitment to take on the change, and the impact we expect the change to have on the organization.

Taking an honest look at where your company stands, and how capable or ready you are for your initiative can help you plan appropriately for the endurance it might require.

This is a good place for the contact center leader to speak to the vision for transformation.

Speaker Notes – Slide 20

These are the five areas we need to cover in assessing maturity. Let's take a look at each one [next slides]

Speaker Notes – Slide 21

Discuss the question on the slide – Share your assessment and ask for input from the participants.

Speaker Notes – Slide 22

Discuss the question on the slide – Share your assessment and ask for input from the participants.

Speaker Notes – Slide 23

Discuss the question on the slide – Share your assessment and ask for input from the participants.

Speaker Notes – Slide 24

Discuss the question on the slide – Share your assessment and ask for input from the participants.

Speaker Notes – Slide 25

Discuss the question on the slide – Share your assessment and ask for input from the participants.

Speaker Notes – Slide 26

Activity

If presenting in person, just have people pair up with someone near them and quickly answer the question.

If presenting virtually, have people respond in chat. You should acknowledge what people have written but do not do a lot of commenting.

This should be a short 30-60 seconds pause for participants to reflect for a moment before going on.

Speaker Notes – Slide 27

Explain the role of a digital transformation coalition and the importance of partnerships.

Who should be a participant: Transformation will affect some individuals more than others, and the committed participation of these key people will have more of an effect on the outcome. The leaders responsible for various parts of the customer journey and IT are critical partners to include,

Why it's important to gain stakeholder alignment: The Contact Center is no longer a touchpoint on the customer journey—it's the hub of customer experience. Accordingly, any transformation to the contact center is risk and impact that will echo throughout the full business, organization-wide and top-to-bottom deep.

Transformation in the contact center can only be accomplished through the efforts of stakeholders throughout the organization. The stakeholders must be moving in the same direction, guided by shared vision and strategy. Awareness, acceptance, and advocacy need to flow from the top of the organization to the front-line agents to accomplish success.

How to ensure alignment: For contact center leaders facing change initiatives, customer outcomes will act as a compass that keeps every department in our company aligned on the same goal. Often, the 'why' is the heart of our customer experience strategy—or the best possible end-to-end customer journey for our company.

Speaker Notes – Slide 28

All of the research on going digital indicates that it is important to make a wise choices in flexible, secure technology infrastructure and to implement these early in the process as they provide a strong backbone for all of your other activity. .

- Adopt a cloud infrastructure so that your system is available whether people are working in the office or remotely from home or customers are doing self-serve from a mobile app or your website.
- Implement a cybersecurity strategy to make sure customer data is secure, to protect customer privacy, and to protect your own organization's data.
- Use an omnichannel platform (such as NICE's CXone) to help support a consistent DCX across channels.
- Implement self-service into different channels, such as websites and mobile apps. Customers prefer to help themselves in many situations and it provides for cost savings and productivity gains.
- Enhance existing applications and processes with artificial intelligence and machine learning. Gartner's *2019 Strategic Roadmap for Customer Service and Support Technologies* indicated that those organizations who embed AI in their customer engagement platforms will elevate operation efficiency by 25%, making this a good area for technology investments.

Speaker Notes – Slide 29

Activity

If presenting in person, just have people pair up with someone near them and quickly answer the question.

If presenting virtually, have people respond in chat. You should acknowledge what people have written but do not do a lot of commenting.

This should be a short 30-60 seconds pause for participants to reflect for a moment before going on.

Speaker Notes – Slide 30

Transparent communication and training for change are vital ingredients

Speaker Notes – Slide 31

Obviously, measuring the effectiveness of our digital transformation is critical. How will we know that we have improved DCX? How will we know what we need to change to be more effective with our DCX? By measuring our efforts.

Track metrics such as:

- How long it takes for customers to resolve their issues
- The volume of calls to customer support
- How many users log onto each of the digital channels provided
- Cost-savings from adding digital channels

Additionally, reach out to customers to rate or review their experience. Make sure to incorporate a regular assessment of tactics and channels to implement improvements and build out an experience that will actually be beneficial for customers.

Speaker Notes – Slide 32

Activity

If presenting in person, just have people pair up with someone near them and quickly answer the question.

If presenting virtually, have people respond in chat. You should acknowledge what people have written but do not do a lot of commenting.

This should be a short 30-60 seconds pause for participants to reflect for a moment before going on.

Speaker Notes – Slide 34

Various surveys of thousands of digital companies and digital customers have found that these four items are most important to customers and thereby, the most important to DCX.

- **Fast and easy resolutions:** As the world has undergone a digital transformation, the demand for quick (and accurate) answers has risen. Customers want to get a response quickly and to resolve their issues with a minimum of effort.
- **Finding answers at any time:** This means 24/7 access to the organization in order to find the answers the customers needs.
- **Interacting with a friendly and empathetic person:** Customers want speed and convenience, but they also look for empathy and commitment to the issues that they care about. Surveys have shown that customers will spend more with a company that is empathetic and understanding. It may be digital, but the human touch still counts.
- **Getting help by my chosen channel:** Customers want help where they are most comfortable at the moment, whatever that channel might be.
- **Not having to repeat myself:** It gets frustrating when customers have to repeat their verification elements or their account number again and again or explain themselves all over again because they are dealing with another agent, or someone wasn't paying attention.

Any training for digital agents needs to be built around these elements.

With these elements in mind, what are the top skills digital agents need? [See next slide]

Speaker Notes – Slide 35

Besides technical skills, these are the five top skills that agents need to improve your digital customer experience:

- **Empathy:** Emotions can be harder to identify in written communication and can be different than in person or spoken channels. Digital agents should always assume good intent from the customer, no matter how they express themselves, and show customers empathy.
- **Speed:** Fast reply time is correlated with higher customer satisfaction, so digital customer service agents need to have a sense of urgency in everything they do.
- **Attentiveness:** When juggling multiple contacts at once (such as multiple chats, emails, or even multiple channels), agents need to have good attention to detail, reading carefully to fully understand the customer's issue, asking good questions where needed, and identifying how to help.
- **Written communication:** Most of the digital channels involve the written word, so digital agents need to have strong writing skills across different channels. This means summarizing issues clearly and concisely, and clearly providing answers.
- **Social skills:** Personality takes more effort to shine through on digital channels. Adding emojis, gifs, or friendly banter can elevate the DCX and make it more enjoyable for both the agent and the customer.

Speaker Notes – Slide 36

Here are a few things to consider when it comes to onboarding new digital customer service agents

- **Know what you want to accomplish:** How will agents be measured? What does the organization need agents to do? Be clear on the metrics, the quality measurements, and how their actions directly relate to the organization's mission, vision, and objectives. These are the things that need to be supported in onboarding.
- **Teach them to work across channels:** If you limit agents to only one or two channels, you are right back to multi-channel rather than omnichannel, which is critical to an effective digital strategy. Train new agents so they can follow customers across channels whenever necessary. This way they can meet customer needs and help out wherever the need is greatest.
- **Teach digital media etiquette:** Digital channels have their own rules, so help your agents learn the nuances, such as the meaning and usage of popular emojis and acronyms.
- **Provide knowledge and resources:** Give them hands-on experience and shadowing time with software tools so they get hands-on experience. And have a solid knowledge management system. Remember that agents need streamlined tools that allow them to get their jobs done without added complexity. You want agents spending their time helping customers rather than toggling between different tools. Tools such as NICE's CXone make it much easier on agents, who are doing a complicated job already.
- **Create a feedback mechanism:** New hires need more feedback than seasoned agents, so make sure and allow for that. Give them feedback right from the beginning and take advantage of customer feedback to provide specific examples and opportunities for improvement.

Ask, what other recommendations would

Speaker Notes – Slide 37

Activity

If presenting in person, just have people pair up with someone near them and quickly answer the question.

If presenting virtually, have people respond in chat. You should acknowledge what people have written but do not do a lot of commenting.

This should be a short 30-60 seconds pause for participants to reflect for a moment before going on.

Speaker Notes – Slide 39

Here are a few things we covered at the beginning of this session. What do you want to remember the most about what is digital customer experience? *[Just have participants call out a couple of things.]*

Speaker Notes – Slide 40

Here are a few things we covered in the section on our digital plans. What is something you most want to remember about digital strategies? *[Just have participants call out a couple of things.]*

Speaker Notes – Slide 41

Here are a few things we covered in the last section of the session. What do you want to remember the most about training digital agents? *[Just have participants call out a couple of things.]*

Speaker Notes – Slide 42

To ensure our transformation accounts for your needs, help us understand the following from your perspective.

Either discuss each question with the group now or administer a survey (distributed electronically after the session or on paper now). However you decide to get this information, it is an important part of getting stakeholder buy in and getting important information to consider in your transformation efforts. .

Any questions you have that I can address right now?