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# A Strategic Approach to Customer Engagement Optimisation

A Verint® and KANA® White Paper

**KANA. VERINT.**  
A VERINT. Company

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## Introduction

Many organisations view customer service as an important way to differentiate themselves from their competitors. However, as the number of communication channels and devices increases, so does the challenge of engaging consumers effectively while continuing to deliver a consistent, contextual, and personalised service across them. This paper takes a closer look at the challenge and explains how customer engagement optimisation solutions from Verint® and KANA®, A Verint Company, can help organisations by enriching customer interactions, optimising their workforces, and improving processes. In doing so, organisations can benefit from increased customer loyalty, enhanced performance and revenue, while reducing risk and operating costs.



### Verint. Powering Actionable Intelligence.

Verint Systems Inc. (NASDAQ: VRNT) is a global leader in Actionable Intelligence solutions for customer engagement optimisation, security intelligence, fraud, risk and compliance. Today, more than 10,000 organisations in over 180 countries use Verint solutions to improve enterprise performance and make the world a safer place. Learn more at [www.verint.com](http://www.verint.com).

### KANA, A Verint Company

KANA Software, A Verint Company, is a leading provider of cloud and on-premises customer service solutions. KANA helps global organisations – including many of the Fortune 500, mid-market businesses and public sector agencies – optimise their engagements with consistent and contextual customer journeys across agent, web, social and mobile experiences. Using KANA solutions, organisations can reduce costs, increase resolution rates and improve brand loyalty. Learn more at [www.kana.com](http://www.kana.com).

## What is customer engagement?

Customer engagement describes the level of interaction that individual consumers have, either directly or indirectly, with a particular company or brand over time. The term includes all of the interactions that occur along the customer journey; whether those ‘touches’ happen before, during, or after a transaction, and whether they occur by phone, online, or in person. It can also include customer interactions that may be independent of specific transactions, such as general endorsements or criticisms on social media or comments posted on review sites.

Customer engagement should not be confused with customer experience, since engagement encompasses an ongoing relationship with a product or brand, as opposed to an experience at a single point in time. It’s also important to note that customer engagement is proactive. Companies don’t have to wait for a customer to act before they engage—they can reach out to consumers to inspire purchases, build brand recognition, solicit feedback, and gather information. Examples of proactive customer engagement tactics include surveys not tied to specific transactions, rewards programmes, social media postings, and promotional or outreach events. The idea is to build an ongoing dialog with customers that engenders familiarity and some level of emotional attachment to a brand, product, or service.

## Why is customer engagement critical for business success?

According to industry analyst firm Forrester Research, Inc., customer relationships are now the only competitive differentiator, making it vital for organisations to engender customer loyalty.<sup>1</sup> Customer engagement programmes can play an important role in fostering interactions that can help build that loyalty.

Gartner, Inc. notes that “An actively engaged customer is more willing to participate with the organisation through multiple different channels, ranging from online self-service tools or a mobile application, to community participation or user group involvement. They are more willing to provide feedback when asked, make best use of the products or services on offer, and make suggestions on how to improve them.”<sup>2</sup>

Customer engagement can be a game changer, since the more engaged customers are, the greater the likelihood they will spend money on a company’s products and serve as advocates for its brands. By engaging customers effectively, companies can gain competitive advantage, increase customer loyalty, enhance revenue, and better manage their operational costs.

Consequently, it’s not surprising that many organisations are implementing customer engagement optimisation programmes. Gartner estimates that customer engagement initiatives are underway at over 15% of Global 1000 organisations, run by leaders such as the chief innovation officer, CEO, CIO, head of digital marketing, or chief customer officer.<sup>3</sup>

<sup>1</sup> Forrester, *The Forrester Wave™: Loyalty Program Service Providers*, October 30, 2013.

<sup>2</sup> Gartner, *The Four Attributes of Customer Engagement*, October 1, 2013.

<sup>3</sup> Gartner, *The Four Attributes of Customer Engagement*, October 1, 2013.

## What are the challenges associated with optimising customer engagement?

Even though they may recognise the link between customer engagement optimisation and better business outcomes, many organisations struggle with developing and implementing customer engagement initiatives for a variety of reasons:

- Customers can select from a variety of channels—and may use multiple channels—to complete their interactions. They expect a consistent, personalised, and seamless experience, regardless of the number of channels and devices they choose. In reality, however, many organisations may be challenged to provide a cohesive experience that spans multiple channels and devices.
- Customer interaction data is often siloed in different systems, knowledge bases, and functional areas within the organisation, making it difficult to systematically collect, centralise, and share with other groups internally.
- Customer service employees may be overwhelmed or preoccupied by the systems and data required for them to deliver service, or unsure of the next best actions to take to make appropriate, contextual suggestions during interactions. Regardless of the cause, the impression left with customers under these circumstances is apt to be unfavourable.
- Organisations often lack a practical means to analyse large amounts of structured and unstructured data resulting from customer interactions to surface customer sentiments, rising trends, competitive advantages / disadvantages, and other information for timely decision making.
- Cost-containment initiatives have led many organisations to adopt a service model based primarily on IVR and self-service options, rather than on personalised service. According to Gartner, “This potentially leads to a disengaged customer because 80% or more of customer interactions now no longer involve an enterprise employee.”<sup>4</sup>

## What are the requirements for optimising customer engagement?

Customer engagement optimisation generally can be predicated on three fundamental requirements:

- **Consistency**—Each communications channel that the organisation supports should be consistent in appearance, style, messaging, and experience. However, consistent does not mean identical. It is difficult, if not impossible, to deliver an identical experience across a live online chat, an in-store experience, and website self-service transaction, for example. The goal is to deliver the same level of feeling, responsiveness, and knowledge in each channel and provide consistent answers across channels. This means all channels must draw on the same knowledge base and customer profiles.
- **Continuity**—Customers should be able to continue a process seamlessly across devices and channels, without having to start over again if they transition from one to another. Increasingly, customers expect this kind of connection across devices and channels.
- **Customisation**—‘One size fits all’ approaches to customer service might seem convenient and cost-effective for a business, but ultimately, may not be the most effective. Customers expect organisations to understand their needs and personalise their interactions. Ultimately, the best channels and approaches for engagement are not necessarily the ones that are the cheapest, but those that deliver the necessary information to the customer when and where he/she is seeking it, and are the ones that customers prefer.

<sup>4</sup> Gartner, *Adopt Customer Engagement Strategies to Drive Growth*, February 6, 2014.

## What solutions can help optimise customer engagement?

From a practical perspective, how can organisations put customer engagement optimisation into action?

Fundamentally, organisations need skilled, empowered employees who can deliver high quality, personalised customer experiences. They also need executive champions to support and drive change, along with a strategy design that is built with customers in mind. The idea is to identify the different journeys that customers take and deliver tailored experiences along the way by providing relevant context.

To help execute on this strategy, organisations need technology that can show who is doing what, when, and how in their day-to-day operations. This information can help organisations drive operational efficiencies, meet service goals, and improve processing quality and effectiveness across the entire operation—from online, mobile, and social channels to branches and stores, and all way through to back-office operations.

Verint® Systems offers a portfolio of solutions for customer engagement optimisation. It includes software and services for workforce optimisation and 'voice of the customer' analytics—including: voice recording, voice biometrics, quality monitoring, speech analytics, text analytics, enterprise feedback management, workforce management, performance management, desktop and process analytics, e-learning, and coaching. Through the acquisition of KANA®, A Verint Company, Verint has augmented its portfolio with solutions for agent desktop, case management, knowledge management, together with email, chat, and social media response management.

These powerful customer engagement optimisation solutions can help organisations proactively meet the challenges associated with serving customers in today's omnichannel service environment in a variety of ways:

### Enriching Customer Interactions

Customer Engagement Optimisation can enrich customer interactions by helping organisations segment, target, and track customer journeys across interaction channels; providing critical insight for understanding how to create better customer experiences and business outcomes. Using the direct and indirect voice of the customer, Verint / KANA solutions can help organisations predict satisfaction and loyalty drivers across customer transactions and interactions to effectively engage customers and employees.

### Optimising the Workforce

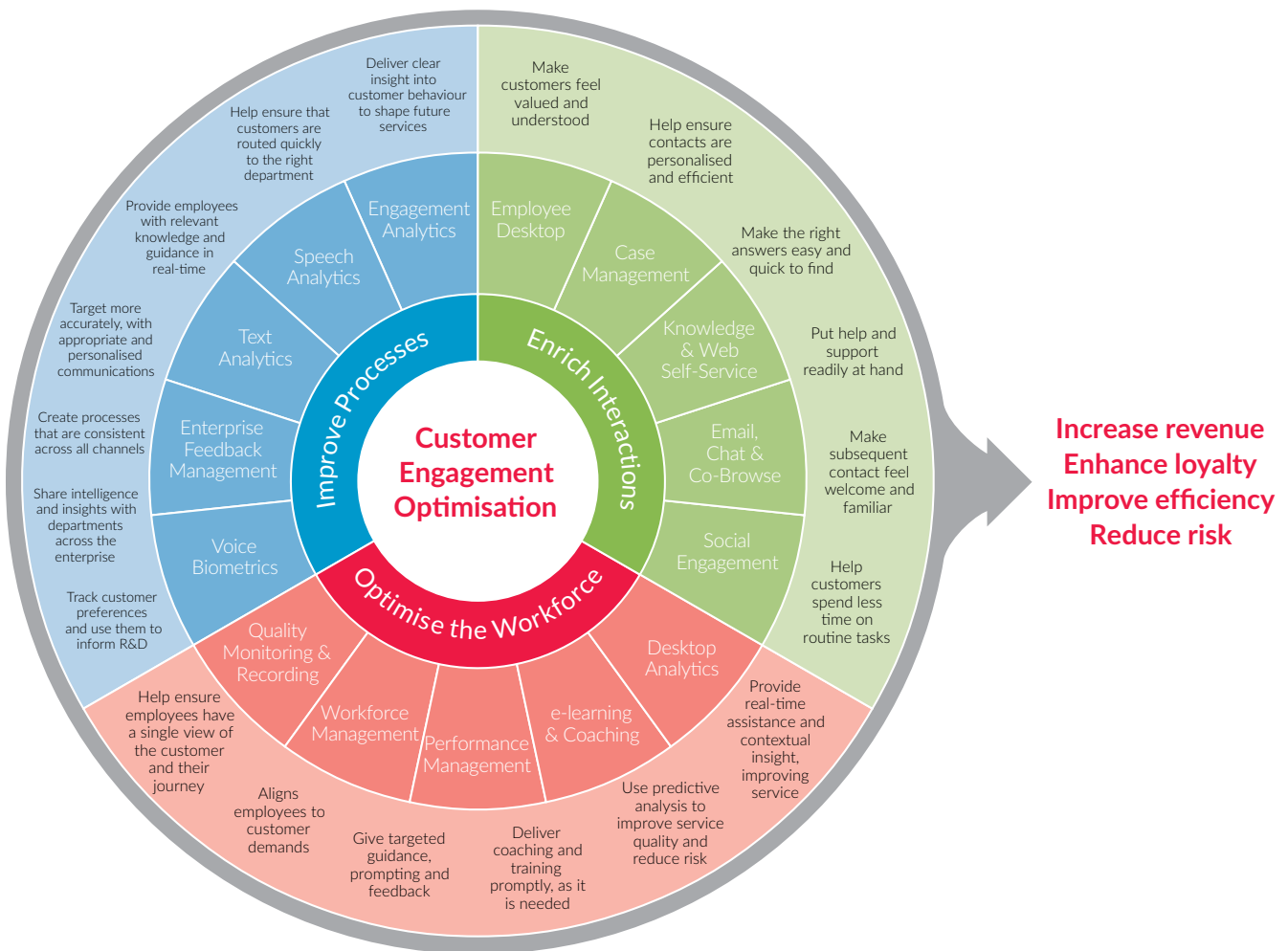
Together, Verint and KANA offer a desktop that can help improve the productivity of sales and service employees. From a single location, staff can access comprehensive customer interaction histories, contextual knowledge, and customer-related information. Real-time, 'next best action' guidance helps employees deliver fast, effective customer service by phone, email, chat, and web self-service; while routing and load balancing can enhance enterprise efficiency while providing visibility into day-to-day operations. Armed with this information, organisations can analyse customer interactions and employee activities, and use this insight to engage their staff, gauge productivity, target coaching efforts, and improve employee support systems. As employees grow more engaged and productive, they are more apt to deliver high-quality service that can better engage customers.

### Improving Business Processes

With Verint Customer Engagement Optimisation, organisations can use multichannel customer and employee insights to identify ineffective customer journey and experiences in order to change customer service processes and systems as necessary. In turn, this can help reduce cycle times and costs.

Verint Customer Engagement Optimisation solutions can also help organisations improve process outcomes, by enabling them to route cases based on their type and priority to specialists with matching skills and availability. By analysing interaction and process performance, organisations can gain valuable insight for making continual improvements.

## Verint / KANA Customer Engagement Optimisation Solutions



## Conclusion

With Customer Engagement Optimisation solutions from Verint / KANA, organisations can aggregate, analyse, and act on the enormous amount of customer, workforce, and other business data that results from interactions across the various departments and systems within the enterprise. This Actionable Intelligence® can be leveraged in a variety of ways:

- Customer experience teams can engage consumers personally and proactively at any point to help increase loyalty and drive revenue.
- Business intelligence teams can engage employees across the organisation by providing them with clearer information that can drive a better understanding of consumer needs now and with more accurate forecasting to meet their needs in the future.
- IT teams can leverage existing systems to provide extended capabilities to meet business challenges.
- Marketing teams can engage customers using the channels they prefer, when they prefer, helping to increase loyalty and retention while driving revenue.
- Operations teams can engage employees by providing them with the ability to see a single view of the customer and work collaboratively to make every interaction count.
- Strategy teams can engage employees by presenting a single view of the customer for driving revenue opportunities, plans for products and services, and process enhancements that align customer needs with company goals.
- Product development teams can engage customers, capture preferences about product features and capabilities, and then funnel that information into research and development staff.

Using Verint / KANA Customer Engagement Optimisation solutions, organisations can transform the customer experience by delivering consistent, contextual, and personalised experiences that count; no matter which channels customers use to engage. By leveraging these solutions, they can broaden their focus from delivering single-point-in-time customer experiences to driving customer engagement, loyalty—and ultimately—revenue.



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