

# Transform Customer Experience in Two Steps Using Case Management



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## Introduction

Most businesses are looking for quick wins to justify further investment in customer experience initiatives. It took us humans hundreds of years to put wheels on a suitcase so can we really expect most organizations to successfully and quickly implement major customer experience transformation programs?

All is not lost. It is possible to transform customer experience by focusing on only two key areas—process improvement and empowering your employees. In the remainder of this paper, we will look at these two areas in more detail before showing how Case Management business applications can help you deliver both.



## Process Improvement

In part, interest in customer experience has been driven by lifestyle brands, such as Apple, Disney and Nike, brands we enjoy using because they are associated with leisure experiences. The word “experience” gives the impression that we enjoy using the product or service. Yet, in our day-to-day lives, we engage with many organizations on a purely transactional basis. Whether it's a bank, an insurance provider or a utility, most of the time, we are simply looking for process or transactional efficiency. Nothing more. Failure to understand this has led many organizations down the wrong path that views customer experience from a leisure, rather than a process excellence, perspective.

Customer experience is often defined as how customers perceive their interactions with an organization. Each one of these interactions is a business process. Many customer experience leaders just execute their business processes better than their competitors. Take, for example, three customer experience leaders—Amazon, Apple and First Direct. All three organizations execute their key business processes with precision. Amazon excels in logistics processes, Apple in supply chain and research and development, and First Direct delivers industry-leading customer service within the financial services industry.

Organizations can improve processes by:

- Taking the customer journey. Does the process need to be fixed or could it be simpler?
- Ensure consistency of approach across all channels. Customer journeys no longer begin and end at the call center. They are now multichannel.
- Use business process automation not simply to reduce cost but to also deliver service consistency and to free employees to focus on where they can add most value to the customer relationship.

## Empower Your Employees

At some point, customers will engage directly with employees, e.g. at a retail outlet, in a restaurant or via a service desk. As a result, customer experience improvement projects must consider the needs of the employee. In addition, while it's important to improve customer service processes, it is impossible to predict every customer scenario. Customers are unpredictable. Exceptions occur. You then need your employees to fill the gaps that your processes can't reach.

But employees can't fill the gaps unless they are permitted to do so. In many organizations, customer service agents are locked into rigid, inflexible business processes with no opportunity to use their discretion to resolve a customer issue. For example, we regularly come face to face with rule-bound employees, restrained by technology into following inflexible customer service paths. This leads to frustration for the employee and the customer.

With the current focus on customer service, organizations are fearful of customers coming face to face with employees who aren't motivated. According to a 2015 Gallup survey, “the percentage of U.S. workers in 2015 who Gallup considered engaged in their jobs averaged 32%. The majority (50.8%) of employees were “not engaged,” while another 17.2% were “actively disengaged.”<sup>1</sup>

Empowering employees and addressing the 68 percent who are disengaged are huge business opportunities. Major achievements in productivity and customer experience will be achieved by organizations that can tap into this pool of disengaged employees and convert them to engaged employees. This will not only require changes in managerial techniques, but also in the use of flexible IT applications, such as case management, that engage and empower employees rather than lock them into fixed business processes.



Immediate steps can be taken to address employee disengagement and empower employees. These include:

- Devolve non-strategic decision making from the center of the organization to your customer-facing employees. Does your employee really need approval to provide compensation for poor customer service? For a high-value client, do agents need approval to match the offer of a competitor?
- Address customer data siloes. Use knowledge management to ensure customer-facing staff have access to all of the customer data to enable them to make more-informed decisions.
- Don't tie agents to processes. Automate repetitive tasks to free agents to focus on process exceptions and unique, unpredictable customer problems. Give agents and supervisors the tools to modify business processes, in flight if necessary.

## Case Management

Case management business applications can help organizations improve customer experience by delivering process improvement and employee empowerment.

### *Process Improvement*

Unlike workflow and basic business process management applications, case management allows organizations to optimize how they handle routine (e.g. purchase orders, on-boarding) and unpredictable (e.g. complaints, claims) processes. Automation of routine business processes delivers process speed, consistency, cost reduction and, if necessary, legislative compliance.

### *Employee Empowerment*

Automating routine processes frees employees to handle the unpredictable events that trip up many organizations. Case management applications deliver support for unpredictable processes through employee empowerment and support for employee decision making. Features include:

- Support for In-Flight Process Change. On an ad hoc basis, entitled employees can remove, skip or add steps to business processes in response to unpredictable events.
- Employee Choice. Employees are not locked into a business process but are instead given the ability to choose alternative process paths most appropriate to the case they are working on.
- Knowledge Management. Case management applications support decision making by delivering information to the employee in context, delivering data to the right person at right place at the right time in the process.
- Orchestration of Business Applications. Case management applications act as a consolidation point for multiple business applications and data repositories used within and outside the organization, giving the employee a holistic view of the issue or case they are working on.

## Conclusion

By focusing on the needs of the customer, for improved process execution, and the employee, for empowerment, no other business application has the potential to transform customer experience in the same way as case management.

Case management applications recognize the predictable and unpredictable nature of modern work, allowing organizations to automate routine customer processes and improve how they handle the



unpredictable through employee empowerment. Case management applications thus address the weaknesses of business applications, such as CRM tools used by many organizations to deliver customer support.

So before you start down the path of a major customer experience transformation program, instead focus on two key areas – your customer service processes and your employee performance – and use case management to transform both.

<sup>1</sup> *Employee Engagement in U.S. Stagnant in 2015* by Amy Adams, Gallup, January 13, 2016

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