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Start improving CX in your contact center.

Get report



About the Workshop

NICE CXone provides these workshop materials for you to use in training your staff. They are designed to last approximately 60 minutes making them ideal for conducting over lunch or as a short refresher where needed.

The workshop 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** for a workshop is 12-18 people. This allows for interactions without it becoming too unwieldly. 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 **Participant 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 PW number so participants can easily re-orient themselves when necessary.

Activity should begin as soon as participants enter the training room (in person or virtually). This tells people that the workshop 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 this preworkshop activity.

Introductions: Because this is a short workshop, no time was allotted for each participant to introduce themselves to everyone else. Introductions can easily take 20 minutes, and that's one-third of the time allotted for the entire workshop. Instead, use the pre-workshop activity time to circulate, learn who people are, and introduce them to people sitting nearby. Virtually, participants can introduce themselves in chat as part of the pre-workshop 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.



Preparing to Lead the Workshop

The **key factors for success** in the workshop 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.
- 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 trainer 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 them off the slide to them. For each tip, you can say here are some things you can do to support this tip, 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.

THE DAY OF THE WORKSHOP

If delivering in person:

- Make sure that the room is setup. If people are going to bring food and drinks, make sure they have enough space for those items. And it can be a good idea to have extra paper towels or napkins available.
- Set up two flip chart pages with the two questions and place them in different places in the room with markers nearby.
- Print out copies of the Participant Workbook and have one at each place.
- Have tent cards at each place for people to write their names upon and display in front of them.
- Make sure you are in the room and ready at least 15 minutes before the workshop is scheduled to begin.

If delivering virtually:

- Make sure you are comfortable with the platform you are going to be using. You should have practiced the workshop on the platform several times ahead of the workshop.
- Email all the participants a copy of the Participant Workbook and encourage them to print them out to use during the workshop.
- Have the pre-activity set up as two open-ended poll questions, a divided whiteboard, or two chat pods (with maybe a third chat pod for introductions).
- Be present in the virtual room at least 15 minutes before the workshop is scheduled to begin.
- As people enter the room, welcome them and start interacting with them.



During the Workshop

- 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 workshop.
- **Be aware of your time.** Because you want to encourage participation, questions, and discussion, watch out for "rabbit holes" that become a whole workshop in themselves. If time runs short, you might have to curtail participant interaction, but you definitely want to leave enough time for them to complete an action plan before they leave.
- Encourage participation. Virtually, let participants turn on their microphones and talk from time to time. Both in person and virtually, ask what participant think or if they would add anything to the tips. 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 workshop to the people who are present.
- Tell stories. Stories help make points clearer and help increase engagement. You
 want to tell personal 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.
- "Nudge Your Neighbor" activities: Keep these to just 30-60 seconds and then move on. People don't have to share with everyone the things they share with just one or two other people during these activities. These activities get the participants to pause and reflect and decide what they might do with the information.

AFTER THE WORKSHOP

Take the time to reflect on your delivery – what went well and what could be improved. Write down a few notes for your future reference.

If you administered an end-of-training workshop, read through people's responses to aid your reflection and improvement.

Congratulate yourself on leading a successful workshop.

Which workshop will you deliver next? NICE CXone has a number of 1 hour training workshops. Browse our catalog and choose your next topic.



Topic	Activity	Time Allotted	Materials
Introduction	Opening Activity Presentation Amazing CX	5 min 1 min 3 min	PPT 5, PW 3 PPT 6-7, PW 4 PPT 8, PW 3
What is DCX?	Presentation Nudge Your Neighbor	6 min 1 min	PPT 9-14, PW 5 PPT 15
Effective Digital Strategies	Presentation Nudge Your Neighbor Presentation Nudge Your Neighbor Presentation Nudge Your Neighbor	8 min 1 min 2 min 1 min 4 min 1 min	PPT 16-21; PW 6-7 PPT 22 PPT 23; PW 8 PPT 24 PPT 25-26 PPT 27
Training the Digital Agent	Presentation Nudge Your Neighbor	7 min 1 min	PPT 28-31; PW 9 PPT 32
Close	Review Action Plan Final Comments Evaluation	6 min 5 min 1 min	PPT 34-36 PPT 37; PPT 10

Total Time = 55 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?





Creating Digital Customer Experiences

A Workshop

Course Goal and Agenda

The **goal** of this course is to take a high-level look at what digital customer experiences are all about and to identify elements to evaluate existing digital experiences or roll out new digital experiences.

- O Introduction
- O What is DCX?
- O Effective Digital Strategies
- O Training the Digital Agent
- O Close



Amazing Customer Experiences

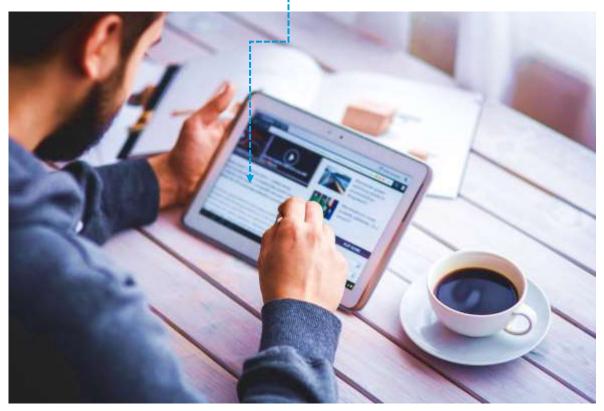




What is Digital Customer Experience?

Digital Customer Experience

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



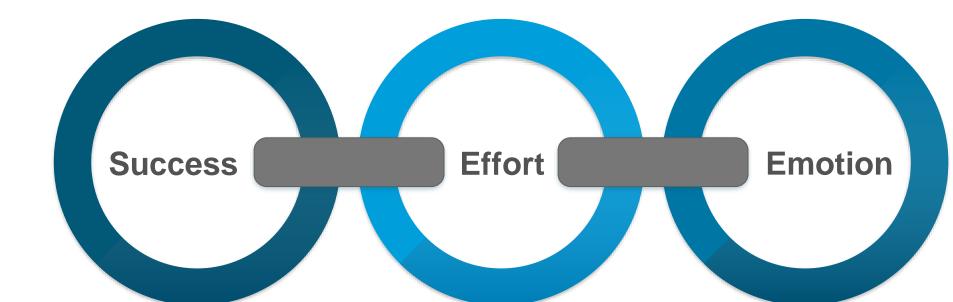
Sample channels:

- 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

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

Will pay more 67% for a great experience

Customers who have an emotional connection with a brand:



304% Higher lifetime value

71% More likely to recommend your brand

Source: Sitecore



Why Digital Matters

Of CEOs said 56% digital improvements led to revenue growth

10%

Greater online spend for multichannel customers

Source: Delighted Team





Nudge Your Neighbor

Take 30 seconds to tell someone near you one thing you want to remember about digital customer experiences.



Effective Digital Strategies

Ingredients for an Effective Digital Strategy

- 1. Align with the overall vision and strategy for the organization
- 2. Understand current customer journeys
- 3. Implement the necessary technology
- 4. Train and support all staff
- 5. Measure success





2. Understand Current Customer Journeys

- What channels are currently provided to customers, traditional and digital? Which of these are most popular?
- Where are the points of conflict during a typical customer journey when a customer will reach out for help? Remember to consider the entire journey, from first-touch, to purchase, and afterwards.
- Is it possible to streamline this journey? What misfunctioning can you correct now?
- Are there commonly asked questions or processes that customer service teams spend a lot of time answering?



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?

Customer Journeys

Know your audience

Identify personas

Address each touchpoint

Multiple sources of data

Easy customer feedback



Nudge Your Neighbor

Take 30 seconds to tell someone near you one important consideration that you see for your organization in understanding your existing customer journeys.



3. Implement the necessary technology



 Adopt a cloud infrastructure



 Implement a cybersecurity strategy



 Use an omnichannel platform



Self-service



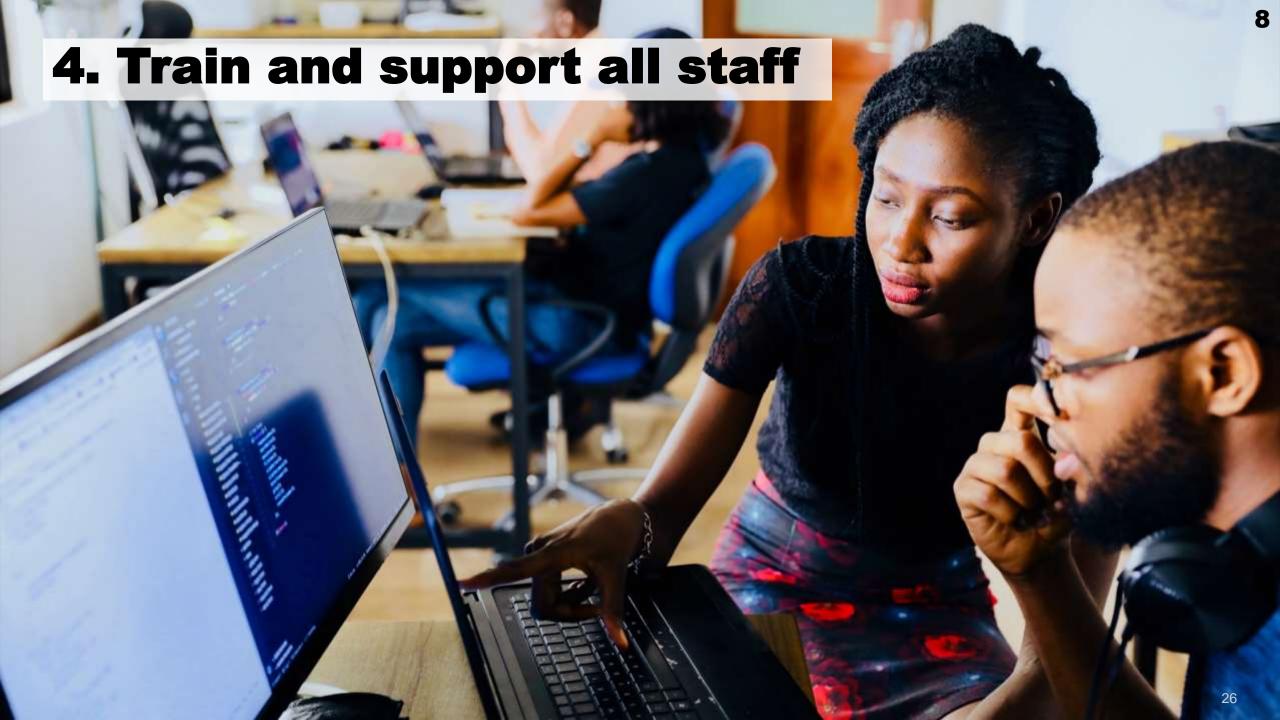
 Artificial intelligence and machine learning



Nudge Your Neighbor

Take 30 seconds to tell someone near you one important consideration that you see for your organization in implementing the necessary technology.







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 DCX.



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

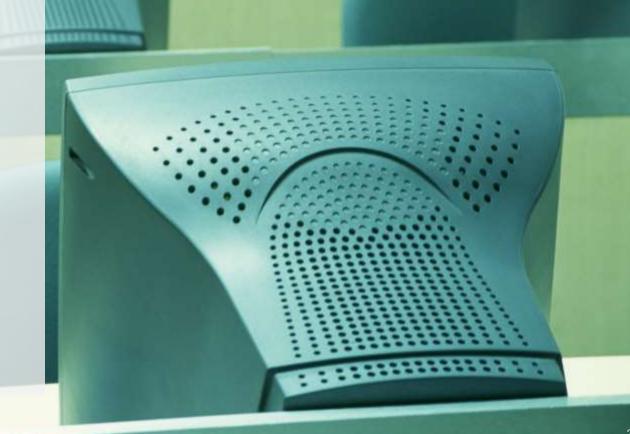


Top Skills for DCX

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

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

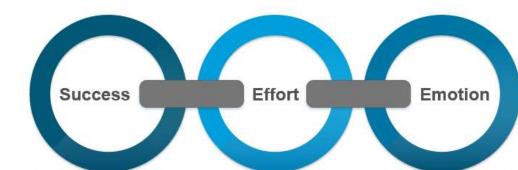
What is Digital Customer

Experience?

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







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?





Effective Digital Strategies

Ingredients for an Effective Digital Strategy

- 1. Align with the overall vision and strategy for the organization
- 2. Understand current customer journeys
- 3. Implement the necessary technology
- 4. Train and support all staff
- Measure success



The Importance of Omnichannel



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 **Top Skills for DCX** Speed Attentiveness Written communication Social skills Empathy

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



3 – 2 – 1 Action Plan

- 3 What are three things that you learned or were reminded about for creating digital customer experiences?
- What are two things you want to do to create better DCX?
- What is one thing you are going to do right away?





Creating Digital Customer Experiences

A training workshop

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https://www.niceincontact.com/

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



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.



In the next hour, we are going to do a high-level overview of what digital customer experiences (DCX) is all about. If you already have implemented digital, then this will help you evaluate your existing DCX, and if you are only now (or recently) implementing digital, then this will help you identify a few elements that you need to consider as you continue on this journey.

Go over the workshop agenda as laid out on this slide, briefly indicating what we will be covering in the next hour.



[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 workshop, keep these emotions in mind and how you can help your customers have amazing digital experiences.



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



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



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 your 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.) are also important to DCX, 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.



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



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.



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, you 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.



Activity

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

If training 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.



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



While a full digital strategy can be quite complex, here are five ingredients that are critical. We are going to go through all four of them.



Your digital strategy does not exist in isolation but needs to be aligned with your organization's overall mission, vision, and strategy. If it does not, you 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 your customer base. Be crystal clear on how a digital strategy supports the overall organization.



Having an in-depth understanding of your current customer journeys can help you make smart decisions when it comes to implementing or improving the digital customer service. Here are some questions you can ask to understand the typical customer journey.



An important part of the DCX for customer is being able to work across any channel they choose and being able to switch channels when working on an issue. This means, that you need to move from multi-channel where each channel is worked independently to omnichannel where you can help customers in different channels and are able to see a consolidated history of what they have done – no matter the channel.

NICE's CXone platform is an example of an omnichannel customer service platform. The My Agent Experience, or MAX, element of CXone enables agents to deal with different channels and to move between channels with the customers as needed, as well as deal with their own scheduling and coaching needs – all through one platform. You can also integrate into your well-established CRM to make it the center of your omnichannel world.

[CLICK] Before moving into omnichannel, however, assess the channels you currently provide. Here are a few questions that can get you started on assessing the current state of your existing channels.

Please note that even if there are channels the customers would prefer but which are not being currently offered, further assessment is needed. Are the customers requesting the channel your core audience? Will the new channel give you access to a new audience that will help you grow? Is the channel worth the time and costs to roll out and manage?

Whether customers are using traditional or digital channels, you have to consider them when devising your digital strategy, and you have to build omnichannel into this strategy. And if there are issues with an existing channel, better to fix these first before moving on.



When mapping out your customer journeys, here are some things to consider.

1. Know your audience.

- Make sure that you are capturing feedback from the right audience the customers you are trying to reach. I
- f some customers have interacted with you in multiple channels, look for persistent pain points across their experiences. They can have a lot to tell you about how well the omnichannel experience fits together.

2. Identify personas

- Devise typical customer profiles
- How does each persona experience the journey differently?
- How does each persona experience the journey the same?

3. Address each touchpoint

- Touchpoints are the building blocks of a great digital experience.
- Focus on the high-stakes touchpoints those places in the journey where your customers might leave without resolution to see where your customers are enjoying the experience or getting stuck.
- Have you identified each touchpoint for each persona?
- Add in relevant content and experiences at each touchpoint.

4. Use multiple sources of data

• Incorporate both experiential data (such as customer satisfaction data) and operational data to get a full picture of the customer experience.

5. Provide a means for easy customer feedback

- Customers should be able to provide feedback in a place and via a channel that they prefer and that takes minimum effort.
- Meet them where they are.



Activity

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



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.



Activity

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We are going to talk about training digital customer service agents, but digital customer experience is not just about the contact center. All employees who are supporting customers in any manner – even indirectly – need to be trained and supported on the digital transformation happening within your organization. Make this apart of your digital strategy.



Obviously, measuring the effectiveness of your digital strategy is critical. How will you know that you have improved DCX? How will you know what you need to change to be more effective with your DCX? By measuring your 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.



Activity

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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.

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]



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

- **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.
- **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.



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 you make for onboarding new digital agents?



Activity

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



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



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Action Plan

Have everyone complete the action plan in their workbooks. This should only take a few minutes. When they are done, they should share with one other person the one thing they want to do right away. (Virtually, they can do this through private chat with one other person in the workshop or they can chat it to everyone.)

Make your final comments and thank everyone for participating today. If you have an evaluation for them to complete, ask the to turn that it before leaving (in person) or before getting offline (virtually).

