

IT professional's
guide to
**CREATING DATA-
DRIVEN EXPERIENCES**



Business colleagues come to IT with many requests. Some are tactical, such as “Our website chatbot shouldn’t recommend items the customer has already purchased.” And some are strategic, like “I want my agents to have the right context when someone calls in, so what are the things that I need to consider?” Of course, you want your customers to feel remembered, heard and understood. It’s the foundation of an empathetic experience and an essential part of running a competitive business. But these requests from marketing, sales and customer service typically rely on data from multiple sources — and compete for limited technical resources.

How can you create value by providing better data-driven solutions for your business — when you’re also juggling existing needs and trying to keep systems going?

To support the business with the right data to drive empathetic customer experiences, you need to access data and unlock insights into your customers’ journeys. This will vary by the type and size of your business, but there are some common elements IT should consider.

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Intelligent, composable business and the data-driven experience

Disjointed customer journeys lead to poor experiences and abandonment. When you unite all your customer data, a full story of the customer journey emerges. You gain insight into each customer, learn what they want right now and get an understanding of what they might need in the future.

With data points across the customer journey coming together, via a **composable customer experience (CX) platform**, everyone benefits from having more context and historical data to decide on the next best action. For example, agents understand which products to recommend based on historical purchase behavior. And you can build bots that give customers the right answer the first time they ask.

Connected, enriched data is core to delivering and orchestrating better experiences across the entire customer journey, no matter which team the customer is engaging with. However, most systems weren't designed to talk to each other.

“Data-driven” refers to a decision-making process that relies on accessing and capturing data from many sources, extracting patterns and insights in real time, and using those insights to make inferences that influence decision-making. Agents are empowered during engagement, and you’ll know when to take proactive measures automatically. A data-driven experience is highly personalized and proactive; it strengthens customer relationships in an increasingly competitive environment.

The proliferation of digital customer engagement channels is flooding businesses with data. But when it's collected into siloed systems, the data isn't actionable in real time. As you add to these silos, it becomes even more difficult for users to get a clear 360-degree view of the customer. You lack a coherent schema across systems and you're left with an increasing amount of unknown and untapped data. Unifying this data across all touchpoints enables you to discover and visualize complete customer journeys.

Some rich data, like call recordings, are mainly used for compliance monitoring. That's a big miss with the vast amount of intelligence within the calls. Unifying data enables you to optimize your investment in recording technology, storage and more to deliver true personalization and differentiation. Connected customer journeys uncover opportunities to engage at exactly the right time.

Whether you're taking your first steps toward understanding what you need to become data-driven, or you want to get more from your existing CX ecosystem (including legacy technology), this guide will get you on the right path forward.

Phase 1

WALK: DIAGNOSE AND PLAN

What should a data-driven experience look like?

Even if your business has some connected systems and supporting analytics, does the data provide sufficient insights needed to run the business efficiently and effectively?

Consider which initiatives will make you more competitive and provide necessary outcomes. Then identify key sources for the right data to inform decisions and drive the best business outcomes. Working with your business leaders is an effective way to map out desired customer journeys and touchpoints.

USE CASE

A health insurance provider is alerted to a high volume of contacts, and a significant decrease in member satisfaction. To diagnose the problem, the analyst team uncovers the journeys that most frequently result in agent-supported contacts. They find that the influx is coming from members addressing a pre-authorization denial – and most are members whose physicians are requesting specific treatment. Apparently, the insurer's system is incorrectly coding physical therapy as a surgical procedure. With this information, the product team who owns the prior-authorization workflow can optimize the submission process. And care managers can reach out to impacted members and give them a temporary workaround.



Evaluate the current state of your data and find the gaps

One of your first steps is to know which parts of the customer journey are being tracked and where that data is stored. Common data sources include eCommerce platforms, CRM systems, marketing technologies, transaction histories, customer satisfaction surveys and more.

Explore which types of data would help your agents have more informed conversations. It likely includes CRM transactional data and browsing history, but what else? Once you have your use case, you can identify the data being generated. Reviewing which systems contain relevant data and then surfacing that data will help agents deliver better service.

Think about what would help a customer-facing employee — or an automated system — make a data-driven decision on next steps. Many IT leaders find it helpful to map out their data and systems. In this way, your map includes not just all your different data sources, but how they connect and where they don't connect.

TIP:

Work with your business colleagues to create a customer journey map. Look for the friction points and any common pain points. Determine which projects you could initiate to provide data-driven insights that would reduce friction and have the biggest impact on business goals.

Collaborate on prioritizing CX objectives

The process of unifying information sources requires input from multiple stakeholders who are responsible for different parts of the business. The contact center wants high customer satisfaction (CSAT) rates; it has operational KPIs within a tight budget. Marketing worries about conversion, brand perception and churn. Sales teams want to convert leads or up-sell. And everyone wants happy customers.

Meet with these leaders early on and prioritize what's most important to the business. Together, you can identify the issues that will be easiest to address right away and the best path for the long term.



Companies that can aggregate all customer information — including user attributes, behaviors, and past interactions across all channels — will be able to engage much more effectively.

McKinsey & Company

Assess your data requirements

Once you decide which journeys you want to impact initially and how, look at what you already have in place. Identify which parts of the customer journey you're tracking and where that data resides, in terms of which silo it's in. This is likely your most accessible engagement data and basic customer support data.

If there's data you don't have access to and it's important in building customer journeys, decide how you're going to get it — whether it's from existing in-house systems, new solutions or third-party data providers.

TIP:

Consider starting with a collaborative visualization tool to map out what the journey today might look like. Then find out what additional data is needed to fill the gaps.

Think about security, privacy and compliance before you get started

When evaluating composable platforms, look for one that has built-in security standards and compliance regulations that are unique to your industry and region. The technology should make it safe to operate your business and safe to use the data you've collected with the platform.

When the platform includes continual updates to adhere to the latest privacy and security guidelines, it frees up IT teams and removes a major roadblock to implementing data-driven experiences.



Measure your results

In the Walk phase, you'll decide what data you can capture and measure now and how to do so. Have an analytical approach defined before you begin implementation.

- Establish baseline numbers for your KPIs and measure success against those in future phases.
- Consider change management principles to track your success.
- When evaluating success, review outcomes based on the data you chose — you might need different data rather than an improved process.



Checklist

Before you run:

- ☐ Build collaborative processes with the business to capture meaningful data and analytics.
- ☐ Identify missing data and any data gaps within the customer journey. Then find ways to enrich it or collect more data.
- ☐ Decide which reports and analytics tools you'll need to optimize operations.
- ☐ Assess how much of your staff resources you can use for this initiative and any other tasks you can deprioritize.
- ☐ Understand data governance of security, privacy and compliance.
- ☐ Determine which systems will enhance processes for additional business units.

At the end of the **WALK PHASE**, you've identified all the components that bring together the customer story. Now you need to find a way to connect them.

Phase 2

***RUN: INTEGRATE, EXPLORE
AND OPTIMIZE***

RUN

You've identified the business problems you want to solve and the data you'll need to enable that single source of truth. The number one reason you need to integrate that data is to have better conversations with your customers.

You likely have all the data you need without realizing it. Now it's possible to integrate it on a composable platform and make it available to all stakeholders. This might include employees, customers and the system itself.

Do you have a single source of truth or is data duplicated in multiple places? Which data is missing for marketing, customer service or sales? Is your existing data usable or does it require transformation for you to use it? For example, if you have a lot of recordings, can your speech analytics make sense of it? It's a similar question for text. If your focus is on putting data to use for the journey, that data must be accessible.

USE CASE

Integrating data from multiple channels allows agents to deliver deeper, more satisfying experiences. Even when agents aren't involved, it's easier for customers to complete transactions. You can bring in relevant product information from your product inventory, images or technical specifications — and know whether a marketing campaign brought customers to your website. And, because the customer is in your ecosystem, you can build on what you already know about them and mine that data.



Rely on a composable platform

Connect previously disparate data sources and analytics in one place using a **composable platform**, and you'll have a foundation for long-term innovation and sustainable differentiation in a continually changing marketplace. In fact, data-driven experiences require this for true agility and to make full use of all the parts of your ecosystem.

Composable platforms have an abundance of extension points, including APIs and pre-built integrations to Salesforce, for example. These APIs are a valuable vehicle for bringing data into and out of your contact center. The right platforms also offer built-in security and adherence to best practices, industry standards and regulatory compliance. No matter where the data comes from — and no matter how many data sources you decide to add — a composable platform makes it easy to connect and exchange data with systems and service providers, quickly and without disruption.

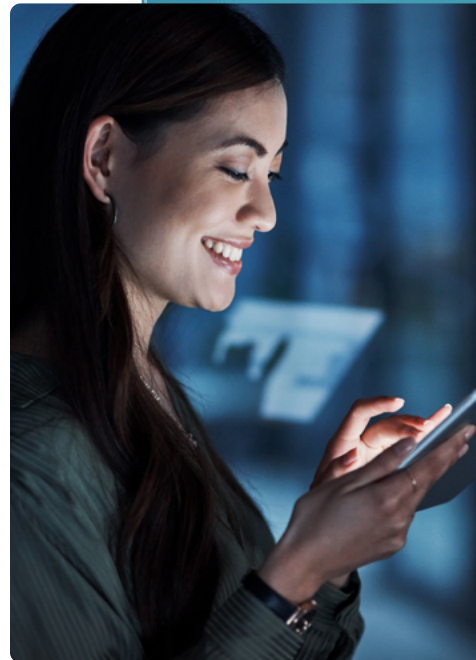


As you think about growing your framework, put agility at the top of your criteria. Don't get locked into data warehouses or data lakes that make it difficult to flex as you mature and add new use cases.

Build or outsource: Assess your domain expertise

One of your first tasks will be to integrate data and normalize it so it's useable. This requires domain expertise to build the initial capabilities. You'll have many options for outsourcing some or all the process. Start by answering these basic questions:

1. What's the size and complexity of your environment?
2. What are your must-have capabilities or mission-critical features?
3. Which systems and applications will you need to integrate?
4. What's your budget?
5. What's your timeline?



TIP:

Because data and requirements are fluid, a composable system gives you the best chance to build a future-proof solution that can accommodate new use cases and their sources of data.

Use data visualization to find gaps

In the Run phase, you want to do more advanced analytics — clustering, pattern detection, relationship mapping and decision trees. The visual presentation of this data matters for reporting. And it becomes a powerful communication tool, transforming complex volumes of data into user-friendly visual objects that help all users understand what the data means.

Analytical tools within your technology stack, or other specialized tools, can create these visualizations. Your CX ecosystem should complement your business intelligence strategy and fill the gaps in understanding your customers. Whatever tool you use for visualizations, it should keep data at the source and find ways to apply analytics to that data, so the meaning of the output is easy to grasp.

TIP:

Making all data usable enables the applications and workflows built on that to extend, complement and reinforce each other so all applications become more intelligent.

Measure your results

- Measure against the metrics you've identified as KPIs with the business.
- Look for spots where you're exceeding or falling behind.
- Do root-cause analysis and determine whether the KPIs you chose are driving business outcomes (e.g., you might find the AHT business users staked everything on has zero impact on CSAT, but misinformation is the top cause of churn).
- Track channel behavior and other preferences to optimize your models.
- Identify the resources saved by eliminating a logic rebuild for every new initiative.
- Explore leading and lagging indicators of performance.



Checklist

Before you fly:

- ☐ Obtain access to the data you identified in Walk.
- ☐ Collect the necessary analytics and reporting to identify gaps.
- ☐ Use some level of visualization for ongoing insight and discovery.
- ☐ Make manual improvements that meet plan goals.

At the end of the **RUN PHASE**, you've identified and begun integrating the systems needed to unify service, sales and marketing data – for a richer view of the customer and better business outcomes.

Phase 3

FLY: ACTIVATE AND AUTOMATE

Now you can take advantage of even more robust capabilities for data-driven experiences, like artificial intelligence (AI) and sophisticated routing algorithms. In Fly, you have the agility to operate and adapt in real time, and see results that were both planned and unplanned.

Insights are being generated from data, enabling you to be more proactive. As the pool of data grows, you can make increasingly accurate predictions about the next best action and anticipate what your customers need.

Armed with the availability of all data across your CX ecosystem, you'll offer a true 360-degree view. And it's not only about how the customer is doing; it's also about how you can enable agents to better serve them.

USE CASE

Your consolidated data makes it easy to implement a range of AI applications, such as predictive routing and predictive engagement. Now that you know why customers are calling, you can automatically route them to the best agent to solve the problem or recommend the next best action. This is based on applying advanced algorithms to all available data and understanding customer intent.



Activate data to automate

Activating data is the process of applying data to drive business decisions — and doing so in a scalable way. In the Fly phase, you can apply data to drive specific processes and customer experiences. For example, you might want to segment customers into a “high propensity to upgrade” bucket. With that, you can automatically recommend the next best resource or product.

By using AI-driven insights, customer journey mapping and cross-channel historical data, you can empower agents to tailor their conversations and deliver more empathetic experiences.

TIP:

As you co-create with your business counterparts, offer data-driven experiences that show how their KPIs have improved. And let them know how those improvements positively affect other areas of the business.

Discover patterns in a disciplined way

Without AI, even the most experienced analysts can look at data and only see what they're looking for. You might miss other patterns because of bias or human error. Applying AI to your data gives you a very disciplined way to extract insights. AI-driven pattern recognition can reveal insights used to fuel next best actions.

Your systems can also continuously learn and improve. For example, AI-driven predictive routing continuously analyzes real-time data to predict outcomes. It enables you to automatically match customers to the best agent while optimizing for important contact center KPIs, such as first-call resolution and transfer rate.



Personalization and predictive routing at scale

When a customer contacts you with a problem, APIs gather relevant data. Identity management helps you cross-reference this customer with the existing customer base. Now you know this individual is a loyal customer and someone who has a long purchasing history with your brand.

Because this customer knows your company so well, they expect the best service from a knowledgeable agent. So, routing is critical to match the customer to the right agent and to ensure that customer will continue to engage with your brand in the future.

TIP:

Leave it up to customers to enhance their levels of personalization once they're part of your ecosystem. In this way, they help shape their own journeys.

Enrich data for more precise predictions

Looking at the real-time behavior of customers on their journeys is just the beginning of what's possible. If you need to enrich your data to build a complete customer profile, you can purchase data from a third-party provider.

Consumers have multiple identities online and they're engaged in multiple, parallel journeys. Companies like Adobe can collect audience data across an ecosystem that includes their website and campaign analytics to form audience segments. You can then use this data, combined with other sets of data, to understand pre- and post-purchase behaviors — the full customer journey.

Data and analytics is central to the intelligent composable business. Data and analytics leaders must therefore select and invest in the most appropriate data and analytics strategies that will accelerate their digital ambitions.

Gartner®, Data and Analytics Strategies Primer for 2021, Jorgen Heizenberg, Saul Judah, 1 February 2021



Measure your results

- Report across multiple areas of your organization to validate how your data-driven strategy is improving outcomes.
- Gauge improvements in service quality due to more service options and better engagement.
- Identify revenue growth from more efficient use of channels.
- Pinpoint cost reduction from call deflection and resource utilization.



Checklist

To fly higher:

- ☐ Prioritize regular collaboration with business users to integrate their feedback.
- ☐ Map out the improvements you need to demonstrate.
- ☐ Run tests continually and optimize for the KPIs you need to closely track.
- ☐ Create personalized, dynamic bots that understand customer intent.
- ☐ Embrace changing requirements — even late in development cycles.
- ☐ Value the examination of intermediate results from inductive processes like data mining.
- ☐ Improve customer satisfaction through early and continuous delivery of valuable and actionable insights.

As you start to **FLY**, you're digging deeper into multiple sources of the right data and using it to generate insights that you can act on in a scalable way. From the customer perspective, you're listening and speeding them forward on their journeys.

Work with the business side to prioritize how to use resources. Many organizations partner with a third-party company like Genesys to fully implement the Fly phase.

Conclusion

It's the best approach: Unify data to maximize its potential and enable important business use cases. Gaining a deep understanding of the data your business needs can improve every stage of the customer engagement journey.

A data-driven mindset applies to your entire business — from sales to service to marketing. And because data-driven experiences are fluid, review them often to make sure they're relevant and fully aligned with business expectations. With a composable platform in place and processes to optimize the benefits of AI, you'll future-proof your technology and assets.

When you're ready to fly, Genesys can help you:

- Implement turnkey AI solutions to address important business initiatives
- Automate the capture of data to analyze
- Set up ways to continually improve processes and results

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ABOUT GENESYS

Every year, Genesys® orchestrates more than 70 billion remarkable customer experiences for organizations in more than 100 countries. Through the power of our cloud, digital and AI technologies, organizations can realize Experience as a ServiceSM, our vision for empathetic customer experiences at scale. With Genesys, organizations have the power to deliver proactive, predictive, and hyper-personalized experiences to deepen their customer connection across every marketing, sales, and service moment on any channel, while also improving employee productivity and engagement. By transforming back-office technology to a modern revenue velocity engine, Genesys enables true intimacy at scale to foster customer trust and loyalty.

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For more information, contact:



Global Technology Solutions LLC (GTS) <http://www.globo-tek.com>

sales@globo-tek.com

+1.855.245.6285