The "Win-Win-Win-Win"

Transforming Customer Experience for an OnScreen World
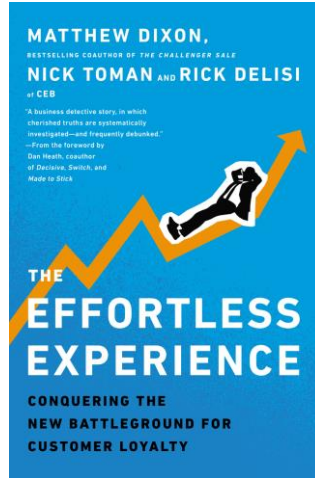
Rick DeLisi

Lead Research Analyst, **Glia**
Co-Author *"Digital Customer Service"*
and *"The Effortless Experience"*

*Presentation to:*
Duck Creek Formation '22

A Little Background...

MATTHEW DIXON,
BESTSELLING COAUTHOR OF *THE CHALLENGER SALE*
NICK TOMAN AND RICK DELISI
of CEB

"A business detective story, in which cherished truths are systematically investigated—and frequently debunked."
—From the foreword by Dan Heath, coauthor of *Decisive, Switch,* and *Made to Stick*

THE
EFFORTLESS
EXPERIENCE

**CONQUERING THE
NEW BATTLEGROUND FOR
CUSTOMER LOYALTY**

Gartner®

How a customer responds to the question:
"How much EFFORT was required for you to get your issue resolved?"
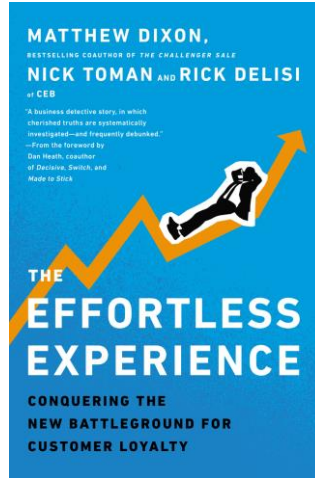is more predictive of their future **loyalty** than any other question

A Little Background...
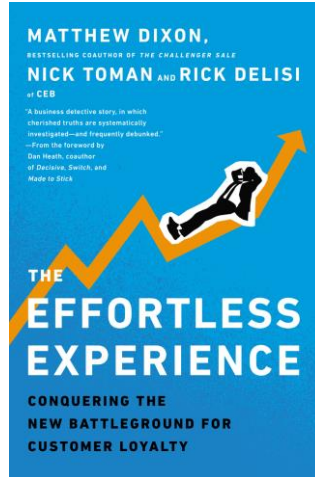
Customer EFFORT now a generally-accepted metric being used by hundreds of companies worldwide

CONTINUED RESEARCH:
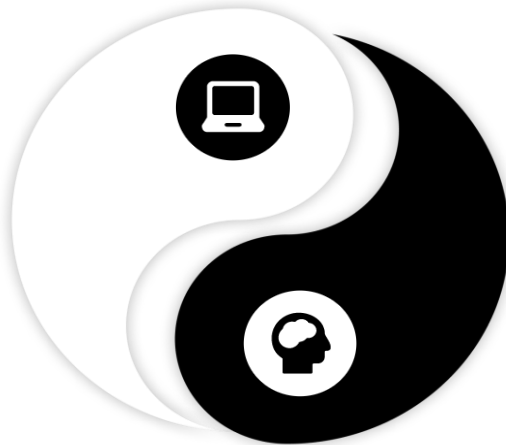# The **EVOLUTION** of Customer Loyalty

What does it take to create an "effortless experience" in a digital-first world?

TECHNOLOGY

PSYCHOLOGY

PREVIEW

What we've been learning:

- Human **behaviors** and digital **expectations** are changing rapidly

- Organizations that are moving forward with a **DCS digital-first strategy** are seeing immediate results
    - Lower cost to serve
    - Greatly improved CX/EX
    - Enhanced revenue

- Organizations that are NOT: **Spending more** than they have to, only to create a **worse experience**

We Are Now "Digital First" People

When your company was founded

Today

"The Evolution" of Becoming On-Screen People

85% **I am online every day**
35% say "I am online constantly"

81% **I regularly use video chat**
35% had never experienced it before 2020

79% **I interact digitally with FS companies**
Frequently or occasionally

Pew, 2021
Morning Consult, 2021

BUT HERE'S THE THING:

No matter how "digital" Service becomes, there will **always** be *some* situations when it makes sense to **talk** to a human being.

Digital Customer Service **(DCS)**

But FIRST: Let's define the term "customer"

DCS: Defined

- DCS is a solution that brings **OnScreen Enhancements** to **any** service interaction--regardless of where it starts.

DCS: Defined

- DCS is a solution that brings **OnScreen Enhancements** to **any** service interaction--regardless of where it starts.

- OnScreen Enhancements include:

  - All **communication** elements of the service operation are fully integrated **(messaging, live voice interactions, video chat)**

  - Each can be enhanced through **collaboration (Live Observation, CoBrowsing)** with a live Service rep

  - **Automation** can be introduced to increase personalization and efficiency

The Difference Between
"digital customer service" **and DCS**
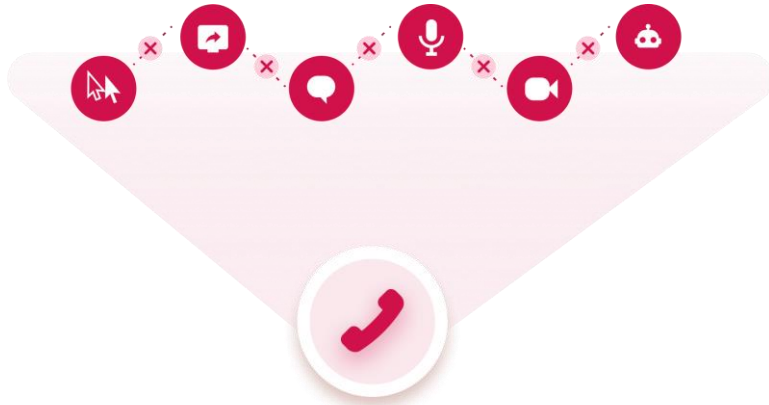
Multi-Channel digital customer service

DCS OnScreen Experience

Data from the Field

84% **People Who Started A Service Interaction On A Screen**
Website or Mobile App

80+% **Phone Callers Who Are On/Near A Screen**
If calling from a mobile phone the number is 100%

Forrester, 2021
Glia, 2021

A **CRITICAL** Difference in Strategy

- **Digital-Also**

- **Digital-Only**

- **Digital-First**

DIGITAL CUSTOMER SERVICE
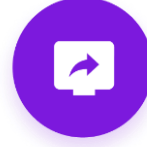
Social

Voice

Phone

Video

File Sharing

Messaging

CoBrowsing

ScreenSharing

Chatbots

Notifications

AI Coaching

DIGITAL CUSTOMER SERVICE

DCS =
Digital-First
and **OnScreen**

OnScreen Communication

Voice

Phone

Video

Social

Messaging

AI Coaching

File Sharing

Notifications

CoBrowsing

ScreenSharing

Chatbots

OnScreen Collaboration
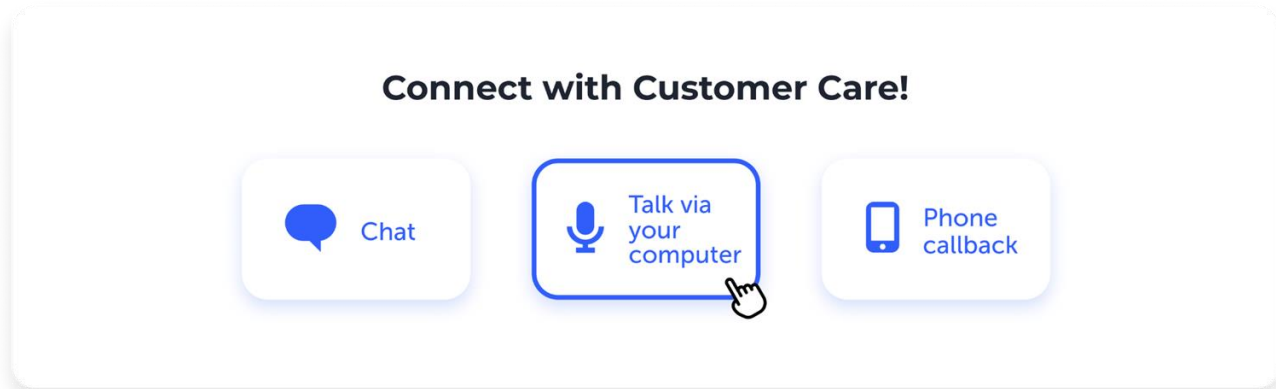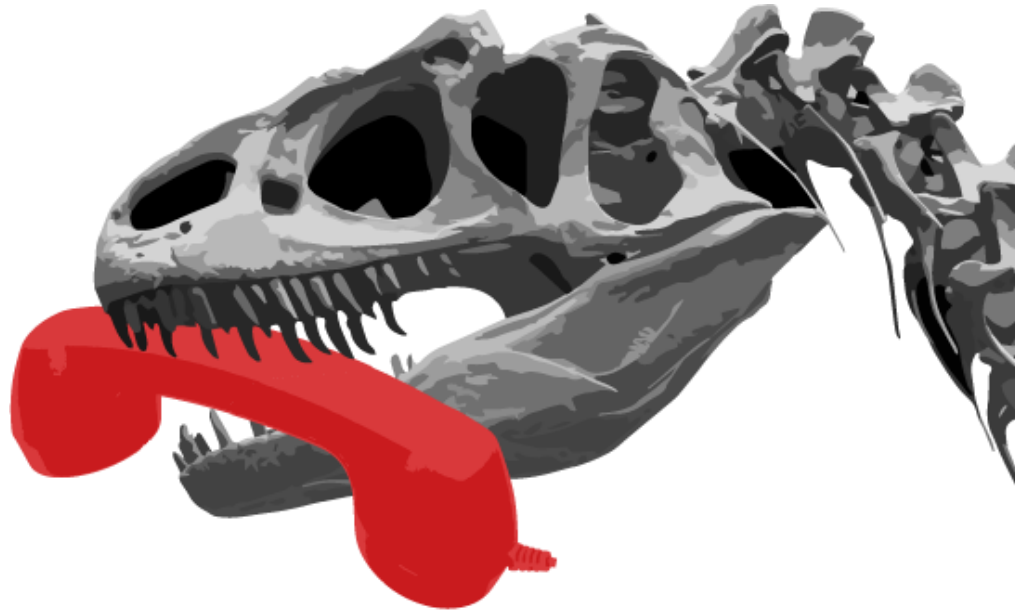
OnScreen Automation

How DCS Is Different

The key is OnScreen Voice

- Live human conversations occur directly through **the customer's screen**

- There is never a need to dial a phone number

- The customer remains in total control at all times

Connect with Customer Care!

Chat

Talk via your computer

Phone callback
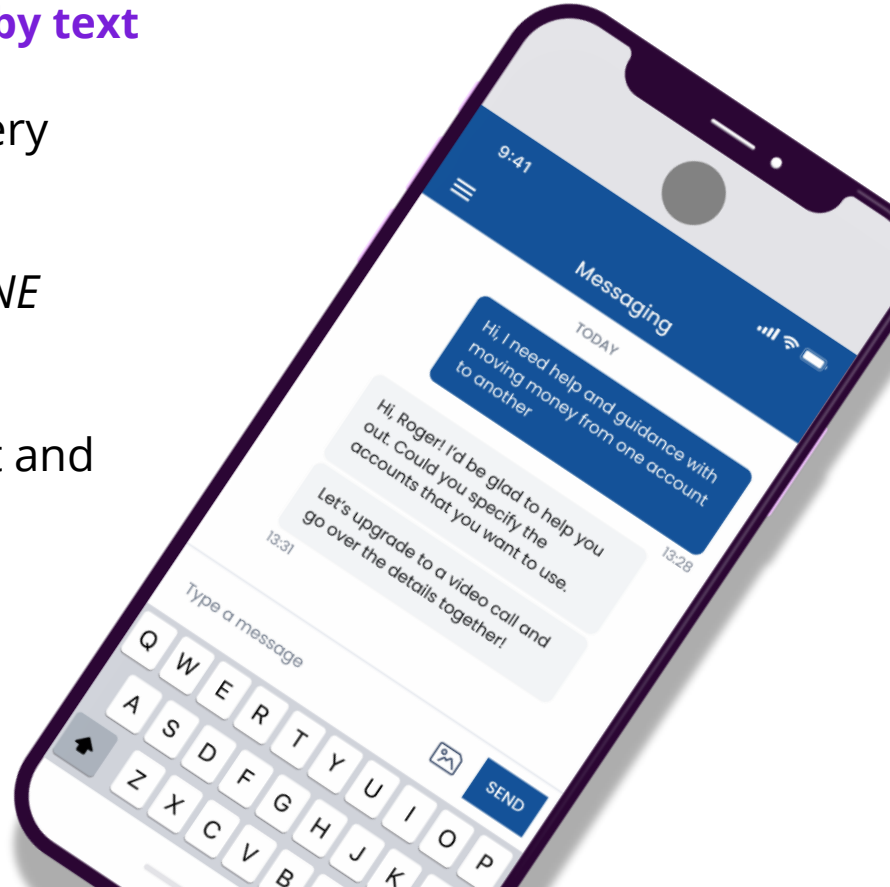
But Don't People Hate Talking?
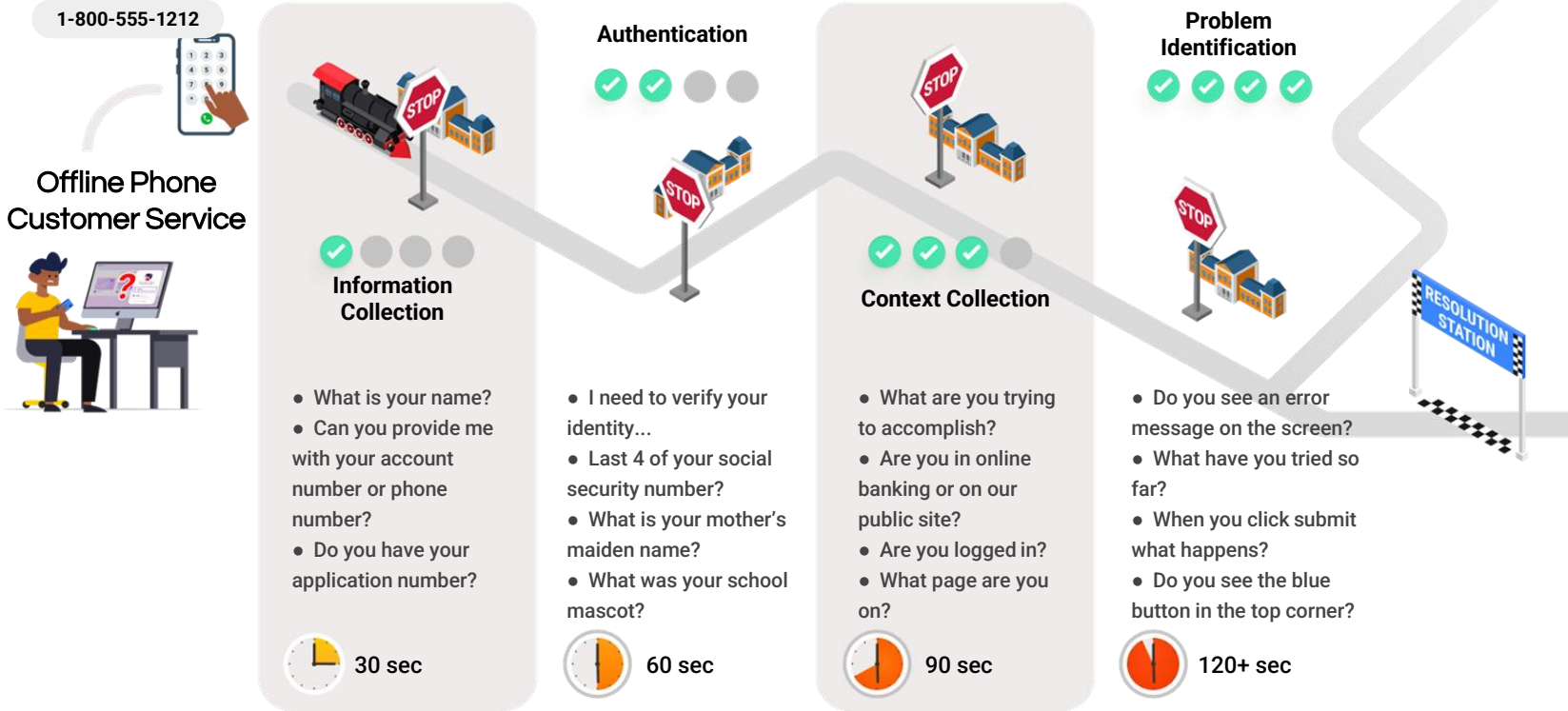
Why That Makes Sense

We've gotten used to communicating by text

- Most of us use text messaging every day in our private lives

- *BTW: Millennials don't talk to ANYONE any more!*

- Therefore, people prefer text/chat and hate having to speak to a human, right?
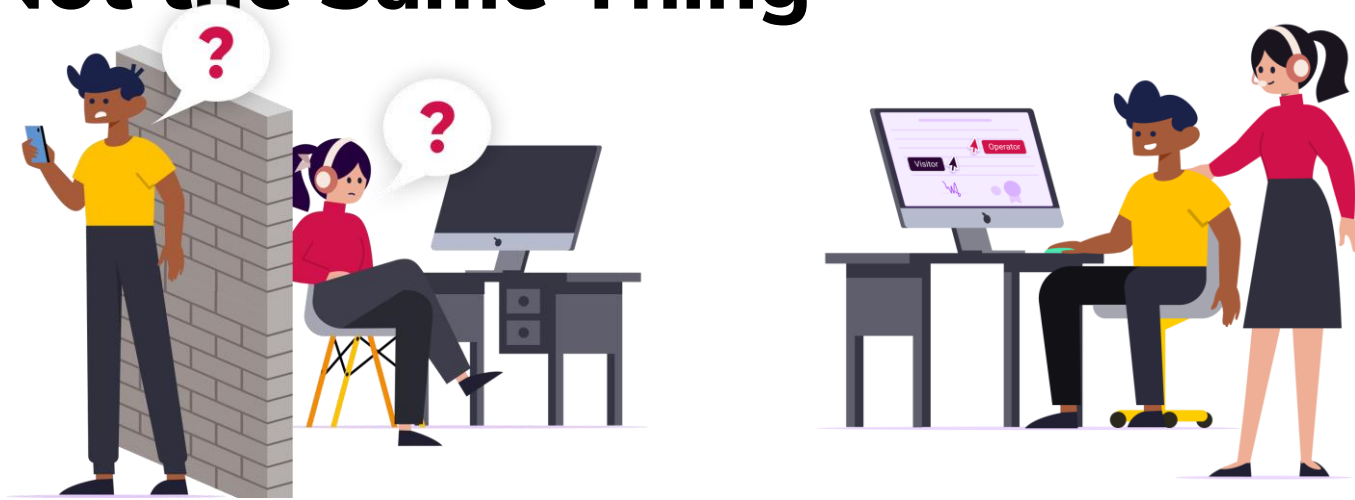
Here's What They Hate!

1-800-555-1212

Offline Phone Customer Service

Information Collection

● What is your name?
● Can you provide me with your account number or phone number?
● Do you have your application number?

30 sec

Authentication

● I need to verify your identity...
● Last 4 of your social security number?
● What is your mother's maiden name?
● What was your school mascot?

60 sec

Context Collection

● What are you trying to accomplish?
● Are you in online banking or on our public site?
● Are you logged in?
● What page are you on?

90 sec

Problem Identification

● Do you see an error message on the screen?
● What have you tried so far?
● When you click submit what happens?
● Do you see the blue button in the top corner?

120+ sec

RESOLUTION STATION

Phone & OnScreen Voice/Co-Browsing:
Not the Same Thing

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Not the Same Thing
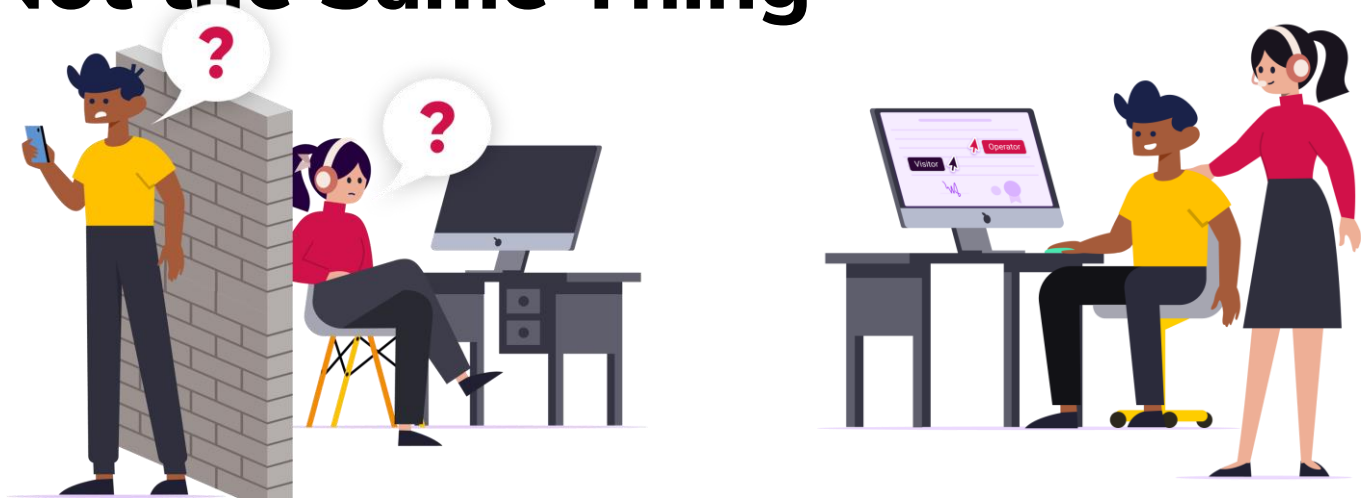
Same two people, same issue, totally different EXPERIENCE!

How does DCS fit into the Duck Creek "ecosystem?"

6 unique benefits

DCS Creates Premium Agent Experiences

DIGITAL CUSTOMER SERVICE

OnScreen Communication

Voice

Phone

Social

Video

Messaging

AI Coaching

File Sharing

Notifications

CoBrowsing

ScreenSharing

Chatbots

OnScreen Collaboration

OnScreen Automation

DCS Creates Premium Agent Experiences

1. Real-Time Underwriting

DCS Creates Premium Agent Experiences

1. Real-Time Underwriting

2. Increase portal adoption and brand loyalty

3. Responsive, OnScreen service

4. Build agent confidence and proficiency

5. Foster satisfaction

6. Differentiate from the competition
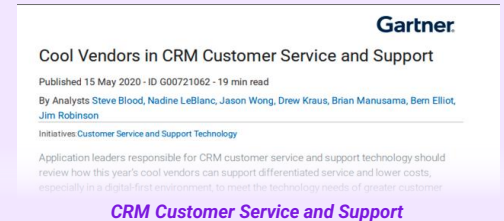
DCS = The New Standard
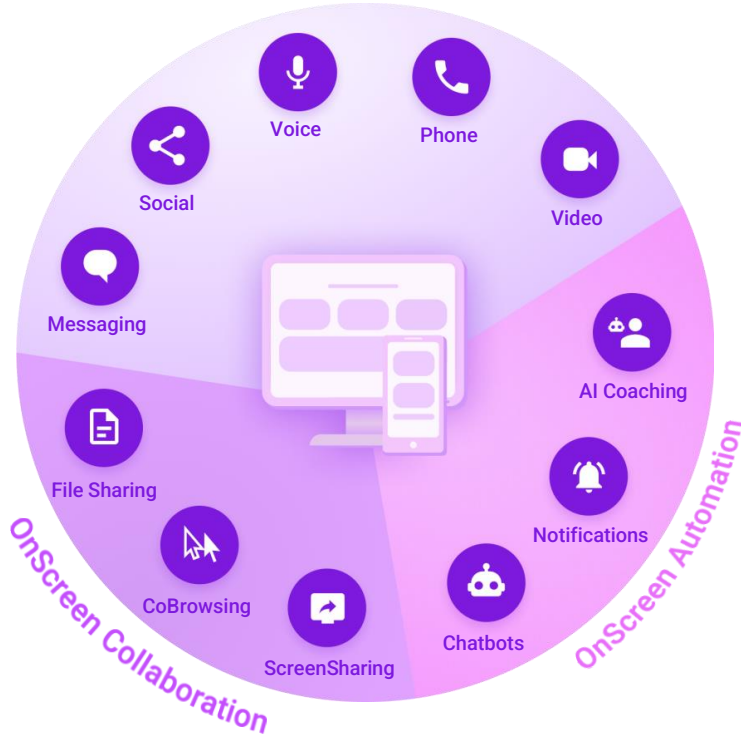
DCS as a Category : Analysts Are Talking
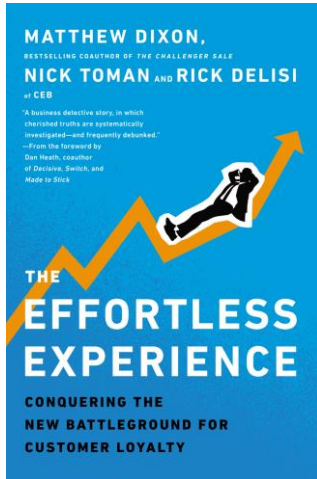
Digital Customer Service and Support Technologies

Digital-First Customer Service Solutions

CRM Customer Service and Support

28

The **EVOLUTION** of Customer Loyalty

DCS enables your organization to evolve as quickly as your customers *(and their customers)* **already have.**

Time To See Glia and DCS "In Action" For Yourself

The "Win-Win-Win-Win"

Who wins as insurance carriers transform to digital-first DCS?

- Policyholders & Agents

- Insurance Carriers

- The Frontline Service Team

- You and Your Leadership Team

EVERYONE