

# How to Achieve Integrated CX from On-Location and Digital Feedback

October 2022

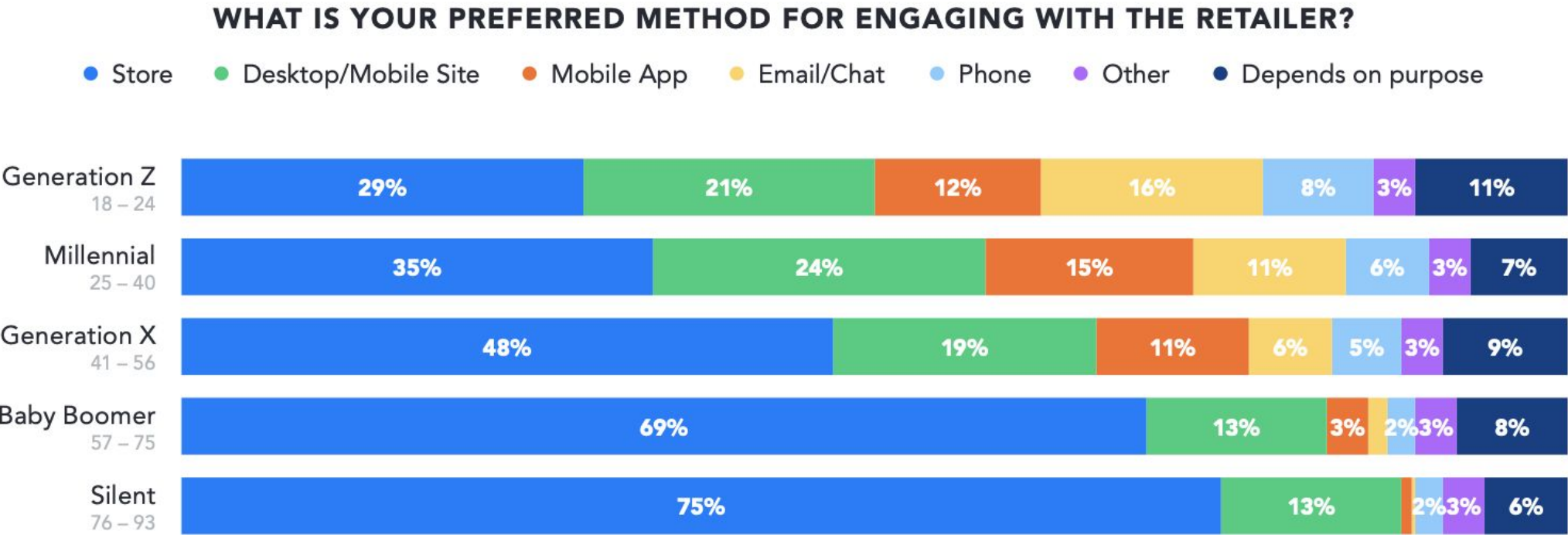
# VERINT®

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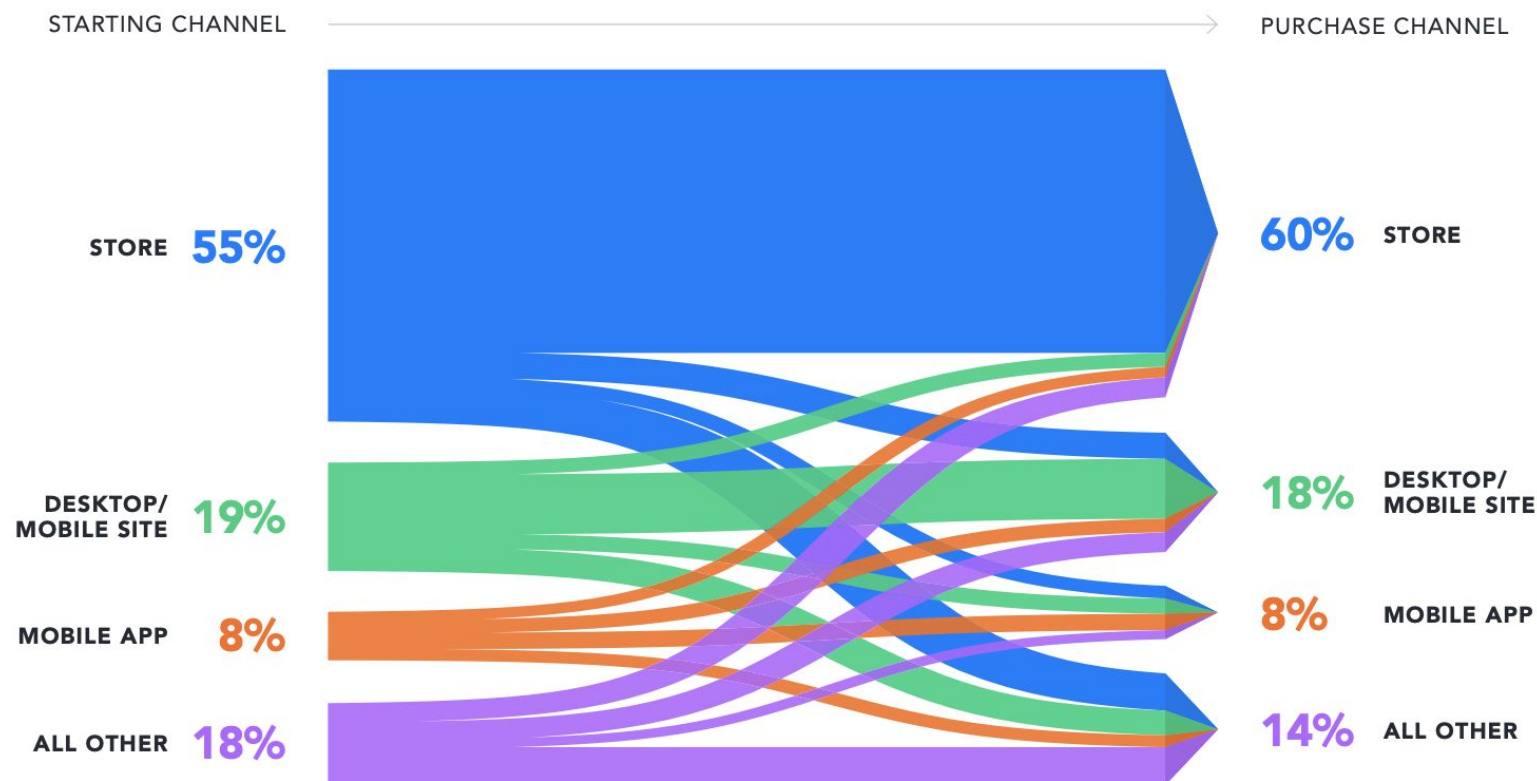
# Engagement Preferences Differ by Generation

Digital engagement continues to increase with younger generations



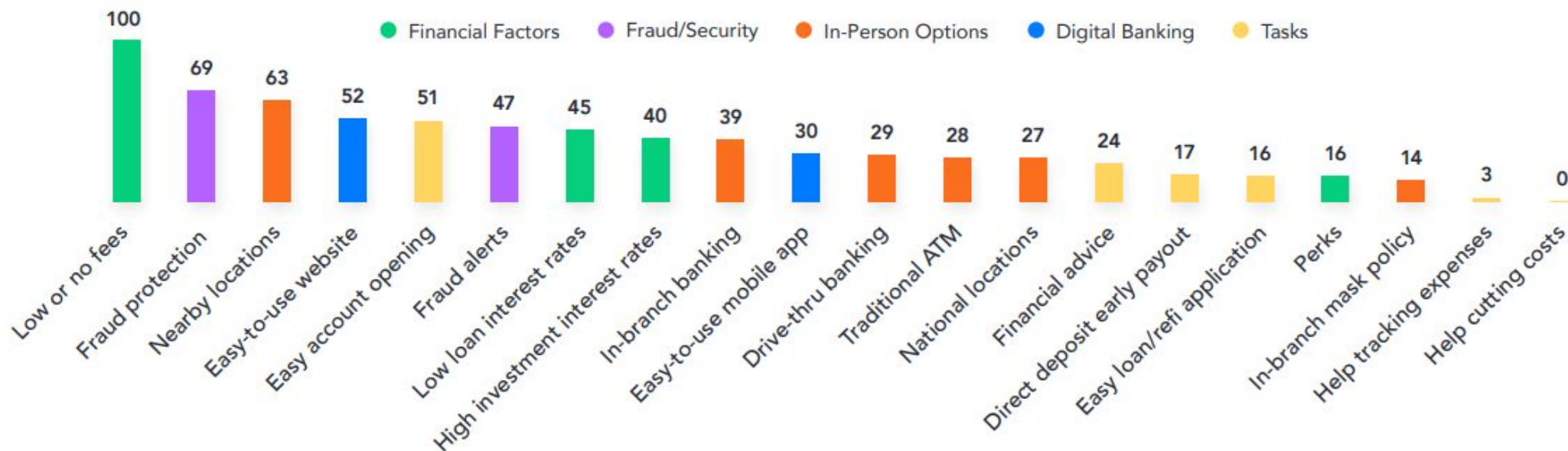
# Customer Journeys

**More Complex Than Ever - Customers are returning to stores, but digital strategies are still as important for creating exceptional customer experiences.**



# What Matters Most When Selecting a Bank?

Overall, low fees were important to customers. However, other high-ranking factors are much easier for banks to act on quickly. For example, fraud protection and fraud alerts are also important and can be as simple as communicating more effectively about the policies already in place. Convenient locations and an easy-to-use website round out the top six, indicating that customers consider a wide range of attributes when making a decision.



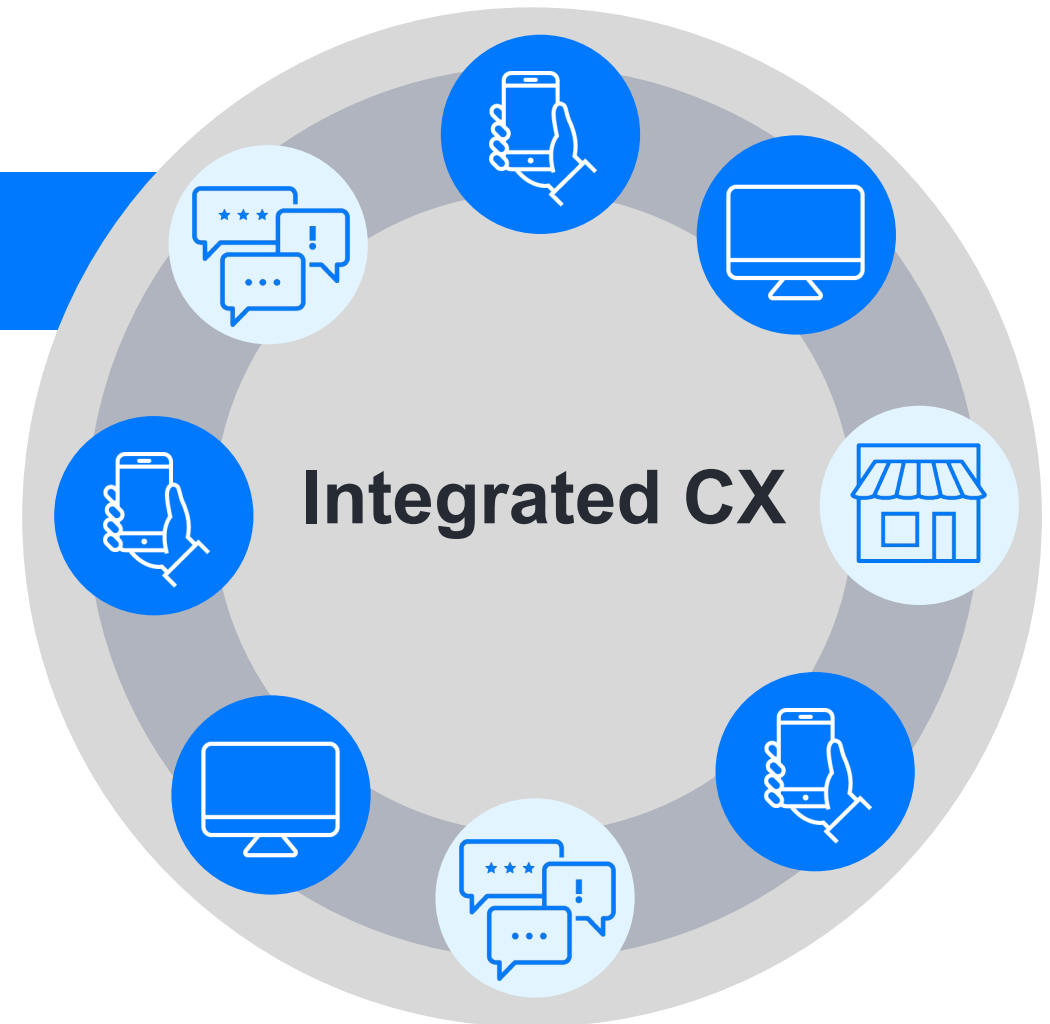
We asked customers what is most and least important to them when selecting a financial institution. We normalized the results of a best-worst scaling analysis to provide the relative importance of 20 factors.



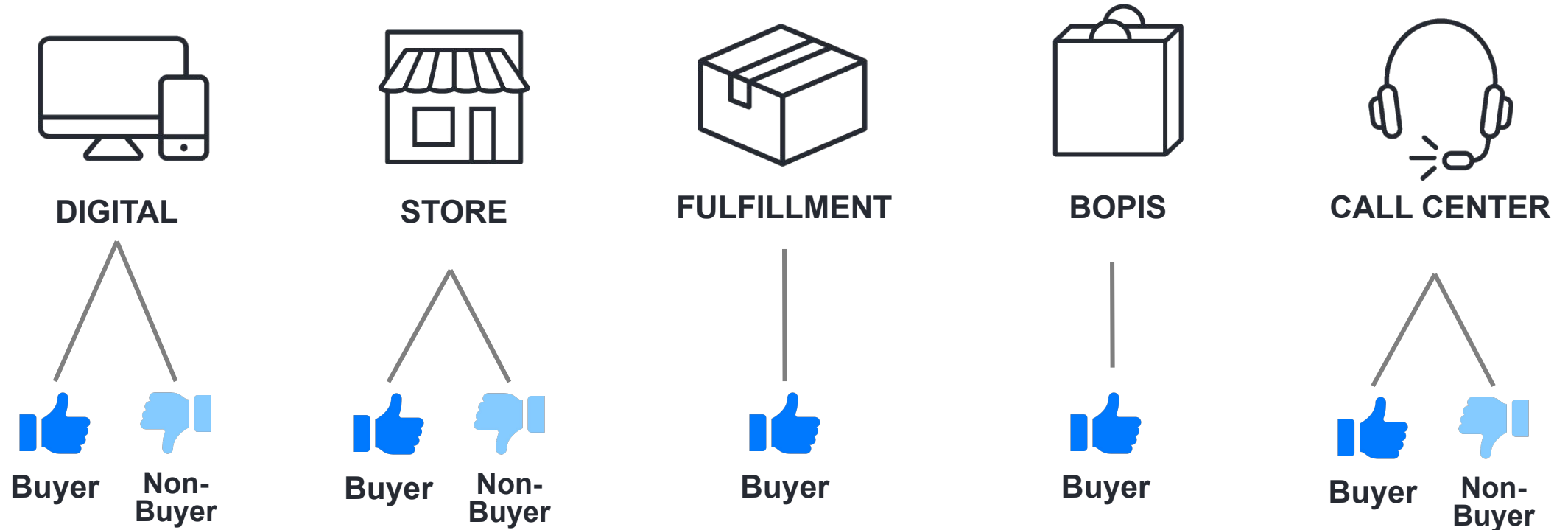
# Achieving Integrated CX Across Digital and Physical Feedback

Building Blocks can be Deployed Gradually

Feedback Collection Across the  
Entire CX Journey



# Interaction Channels



- Learn from every interaction at any touchpoint

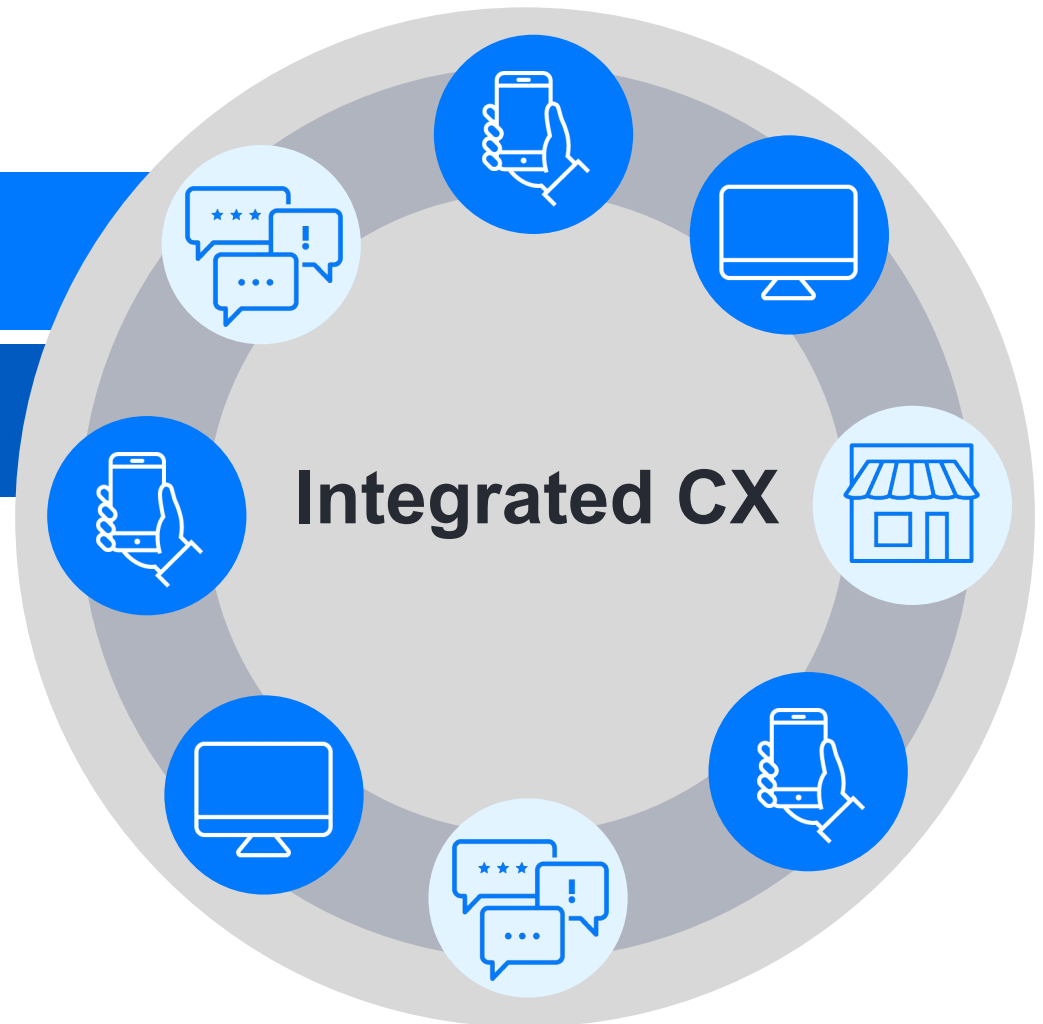
- Unify disparate data sources to understand entire journey

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Moving Beyond Surveys



# Beyond Direct Feedback

- Relevant metadata across all feedback submissions (cart size, loyalty levels, product SKUs, store hierarchy)
- Session recordings to tie feedback back to interactions
- Chat (IVA), email analytics
- Speech analysis of customer to agent interactions





# Custom Variables for Consideration

These are examples of critical contextual data that can be passed as “**custom variables**” as part of your analysis.

Variable Name	What it is	How it is useful
<b>CustType</b>	Customer Account Type or Loyalty Level (e.g. Gold, Premium, Basic).	Use to prioritize feedback or provide information to Marketing on personas.
<b>CartValue</b>	\$ value of items in user cart before purchase.	Calculate average sale for users experiencing reported issues for prioritization and ROI.
<b>SessionID</b>	Customer’s unique session ID on your site.	Look up session diagnostic information.
<b>Error</b>	Diagnostic error messages from your site.	Tell support teams relevant information to resolve issues.
<b>PromoCode</b>	Name of discount or promo applied by user (e.g. “FLASH20”).	Isolate reports of promo code errors for troubleshooting, calculate cost of issues based on frequency of promo code use (from platform analytics).
<b>PromoDiscount</b>	Amount of calculated PromoCode discount once applied (e.g. 25.00).	Use to validate/troubleshoot reports of promo code calculation errors.
<b>TransactionValue</b>	\$ value of user purchase once payment accepted.	Calculate potential cost/importance of issues reported by users AFTER a purchase.

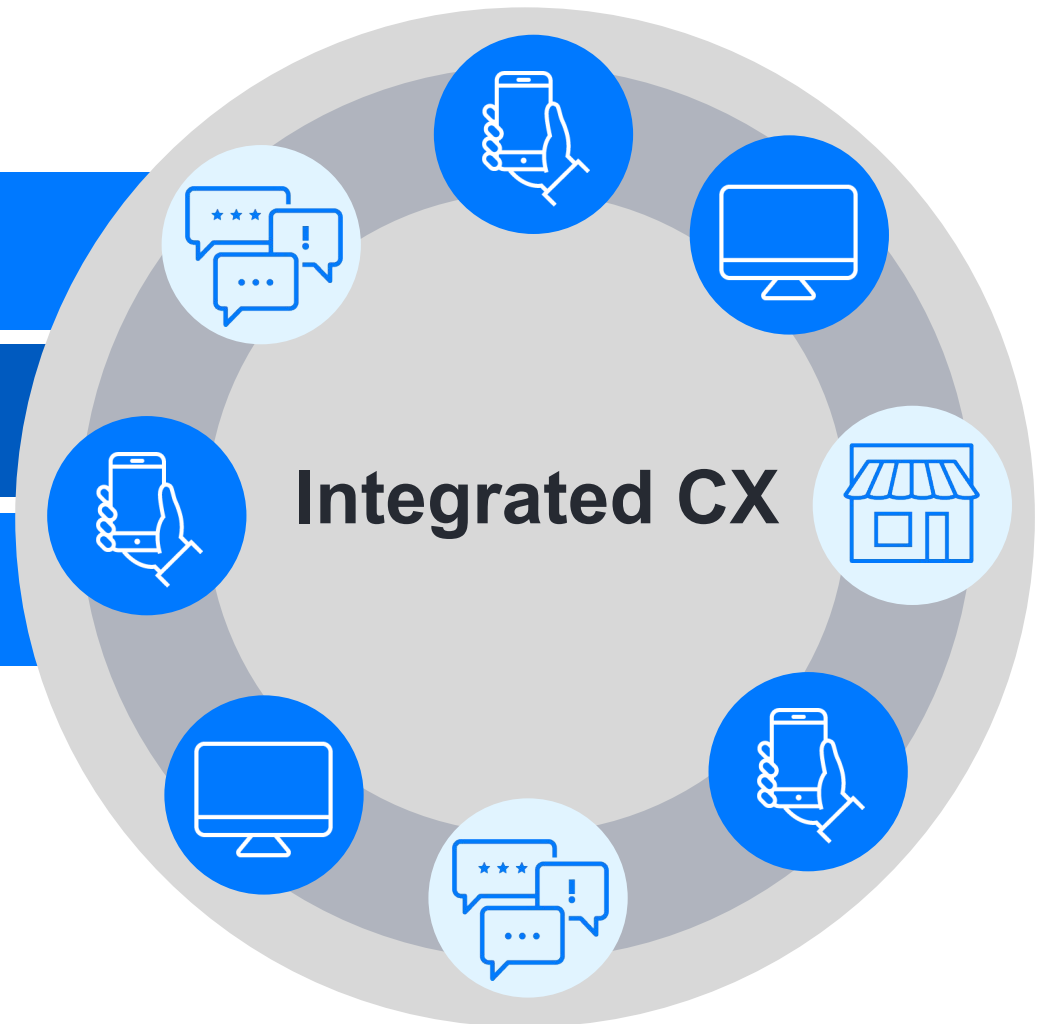
# Achieving Integrated CX Across Digital and Physical Feedback

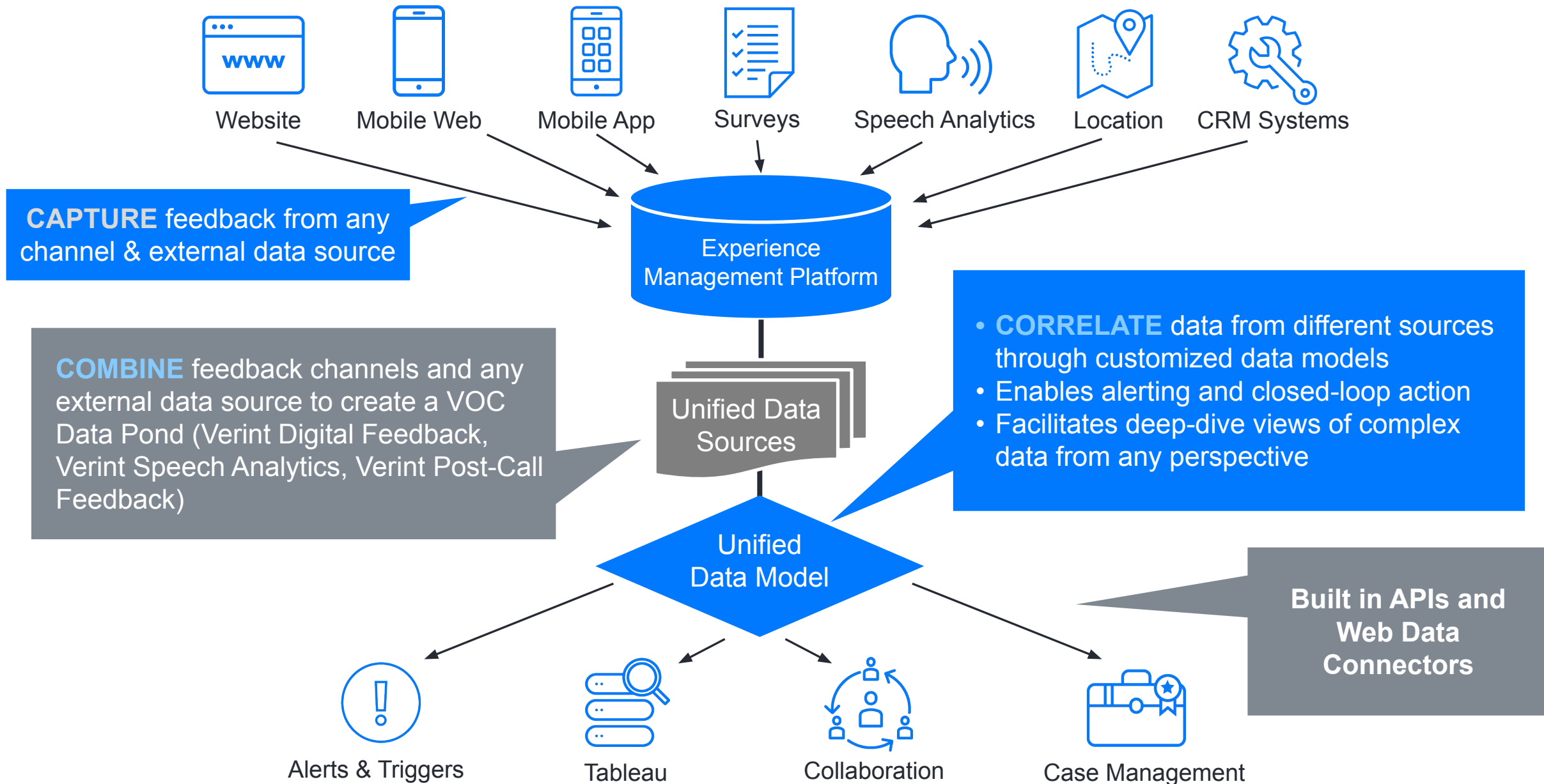
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Actionability & Collaboration





# Case Management Collaboration

Customers feedback triggered a case to be created, assigned to the digital team for analysis and action. Case details are also provided to the Management for additional context to close the loop.

The screenshot displays the Verint VoC Solutions Consulting interface. On the left, a case titled 'Orbital Banking Feedback' is shown with details: Date: 4/15/2020, Agent: Matthew Murdock, Call ID: 0000003210000000000001034532, and Customer Name: Jane Foster. A blue callout box points to the 'Assign Case' button, stating: 'Create & assign cases to engage with customers and close the loop'. Another blue callout box points to the 'Notify Users' field, stating: 'Real time monitoring and alerting quickly identifies break / fix opportunities'. A third blue callout box points to the 'Triggers' menu item, stating: 'Set real time alerts across all channels based on your KPIs'. The interface also shows a sidebar with navigation options like Dashboards, Design & Collect, Report & Analyze, Alert & Act, Triggers, Cases, Data Sources, Panel, Library, Administration, and Configuration. The main content area shows a draft email to Sam Mahoney with the subject 'my new special case' and a list of actions: Send Email, Create a Case, Add as Participant to Survey, and Update Profile Fields.



Chief Customer Officer



Digital Product Manager



District Manager



# Achieving Integrated CX Across Digital and Physical Feedback

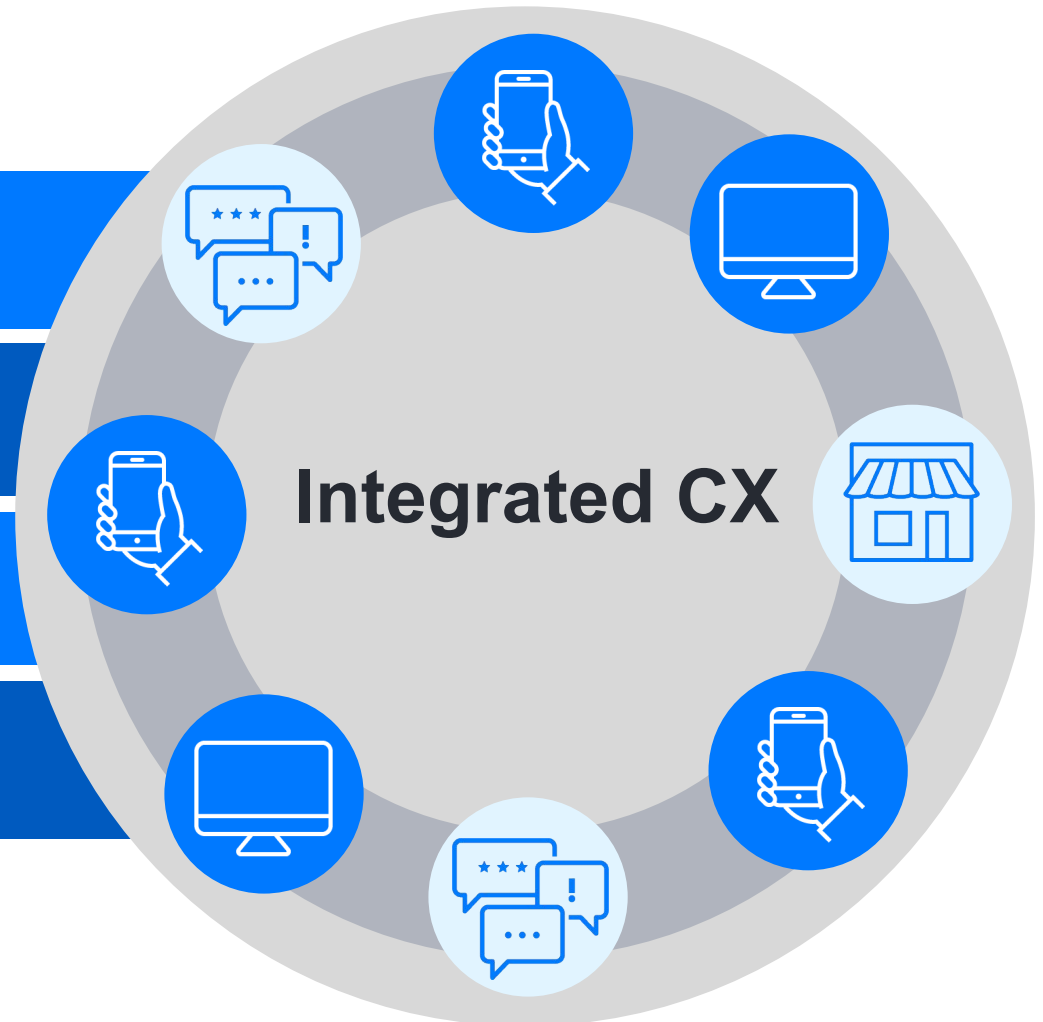
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Unified Analytics





# Experience Quality

A framework to organize and visualize derived effort scores across key tasks and touch points



**Digital Expansion Vision:** Proactively identify issues through alerting and acting on customer experience data across the organization in an efficient and automated fashion.

1



### Optimize Digital Collection

Deploy remote (Verint) hosted code, implement intelligent support, update real time-alerts/notifications.

### Expand the Digital Journey

Add digital collection for key digital interaction points including product pages, search, loyalty, cart abandon, etc.



2

3



### Leverage Unified Platform Solution

Transition to XM Cloud to central data hub and establish foundation for actionability through Reporting, Alerting, Text Analytics and Automated Dashboards.

### Incorporate Non-Survey Data

Enrich analysis by adding 3<sup>rd</sup> party data sources including omni-channel customer or survey data (in-location, contact center), social media, CRM, behavioral data, etc.



4

5



### Experience Quality Measurement

Deploy real-time interactive dashboards to empower entire organization to tactically execute and strategically plan

## Benefits

- Holistic customer view with ability to understand intent, trigger action and operationalize insights.
- Incorporate indirect feedback, direct and inferred feedback for complete view.
- Accelerating speed to insights and action through automation of the monthly VoC snapshot report with real-time, dynamic dashboard views.
- Enrich analysis of transactional interactions and micro-journeys (e.g. loyalty, search, checkout, etc.)
- Automate unstructured text analysis with a customized taxonomy to align with Express' business objectives.
- Create foundation for automation, advanced reporting/analysis, alerting/triggers, closed loop processes.

# Thank You

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