

The ultimate survival guide:

Transforming reactive service into a proactive experience

NICE



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Proactive preparedness helps prevent unnecessary friction during all adventures

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Let NICE CXone guide your optimized customer experience journeys

Proactive preparedness helps prevent unnecessary friction during all adventures



Everyday thousands of people head into the great outdoors, likely setting out with a positive attitude anticipating things will go well. However, an experienced adventurer also proactively prepares for the unexpected. This enables adventurers to set out on their journey and return safely while avoiding potentially disastrous detours and dangerous consequences.

Similarly, a lack of preparedness, unnecessary friction, and outdated tools and information can lead to a dreadful digital customer journey. Outdated and incomplete contact center technology can cause your customers to feel lost and confused. Friction caused by useless channels and touchpoints can be infuriating to those attempting to self-serve. When customers become lost and frustrated, they may decide not to step foot on your business's trailhead again.



95% of consumers say that customer service impacts brand loyalty, and 44% will abandon a brand after two bad service interactions.¹

1. NICE: [Customers demand more—is your business listening? \(2022\)](#)



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Intelligent chatbots

Omnichannel support

Leverage technologies

Use multiple channels

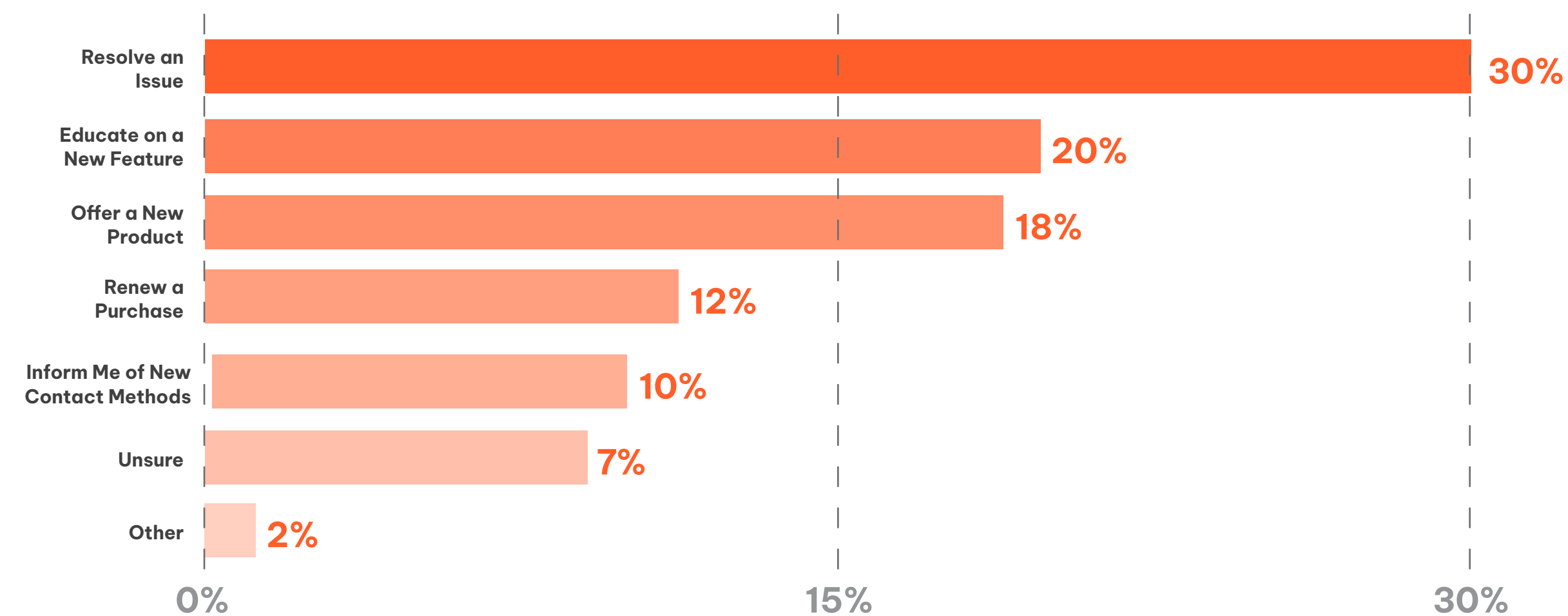
Templated messaging

Use knowledge articles

Annoyed customers result in lost brand loyalty and revenue. And a reactive response won't always repair that relationship. That's why having proactive service in your contact center is crucial for helping customers successfully find the right path.

This eBook features proactive customer experience (CX) survival tips to help you deliver the best customer journey. Let's start the adventure!

Top Reasons for Proactive Service



n = 756

Source Loyalty Through Customer Service and Support Survey

Note: Percentages may not add up to 100% because of rounding

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Proactive survival tip 1: Anticipate customer needs



Outdoor enthusiasts know they need to anticipate their needs before they head out into the wild, so they aren't caught unprepared. And good customer experience and service leaders know they need to anticipate customer needs before the journey begins for the same reason.

It's important for hikers and contact center leaders to learn from past experiences and know what to avoid before they can create the best experience for future hikes and customer interactions.

What is the most common danger you should avoid in order to proactively meet customer needs? Not having the right technology to help you gather and analyze customer data.

How do you survive this potential danger? Make sure your toolkit is complete.

Survey data, social media feedback, and [Voice of the Customer](#) insights help you collect data from all touchpoints and across the organization. Using AI to analyze past and ongoing interactions is the best way to improve future customer experience and optimize your [self-service](#) options.



97% of customers have backed out of a purchase because it was inconvenient to them.³

3. National Retail Federation: [NRF's Winter 2020 Consumer View](#) (2020)



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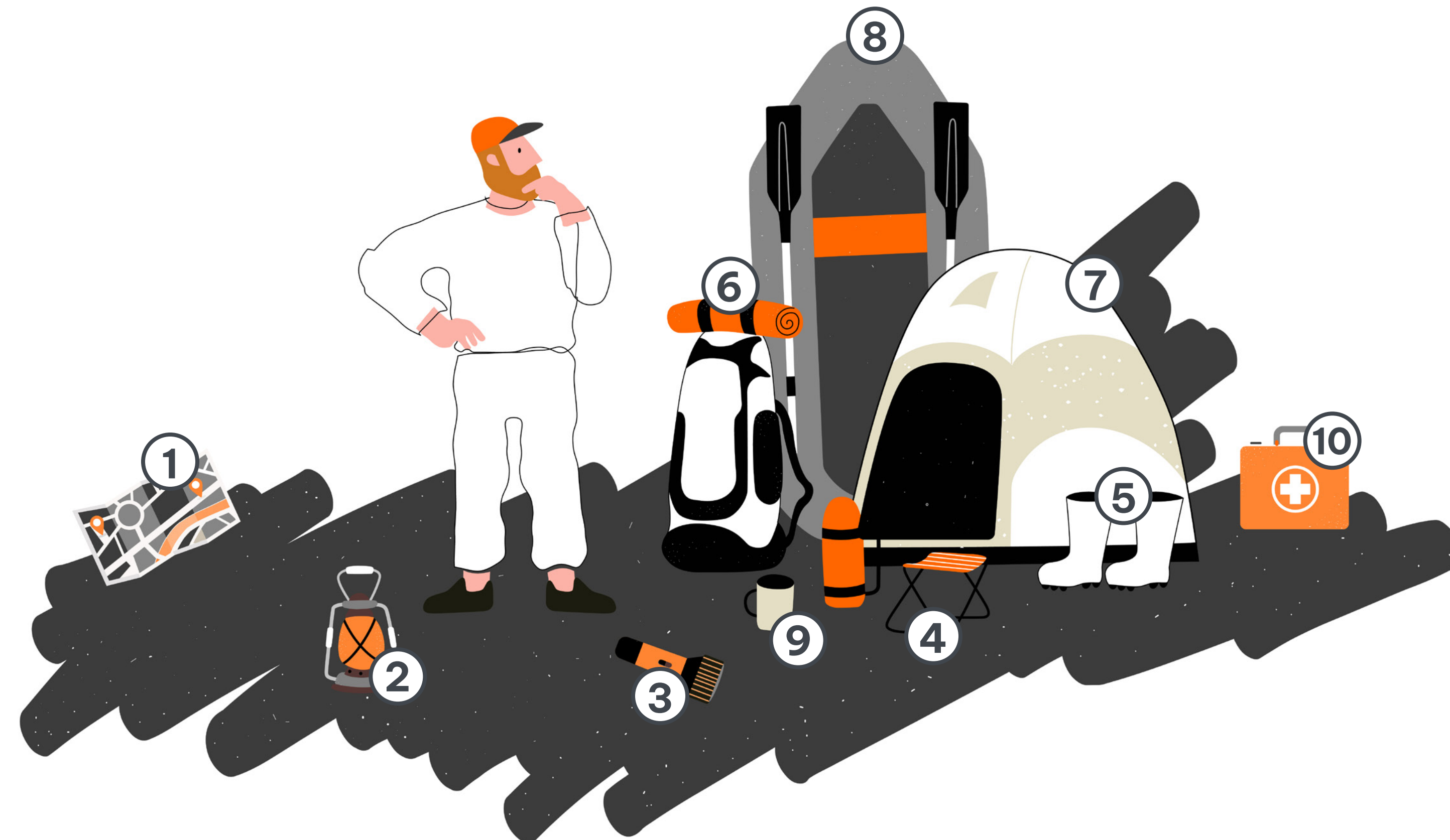
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If you know what customers need before they contact you, it's possible to proactively address issues. AI can also help you determine which customers should be notified of problems through outbound communication.

Modern contact center solutions can also assist with examining this data in real time. [Natural language understanding](#), live transcription, and [sentiment analysis](#) enable managers to see exactly why customers are reaching out at any given time so they can spot trends early. [Integrated recording](#) and transcription across channels make it easy to investigate abnormalities.



- 1 Survey data
- 2 SM feedback
- 3 Personas
- 4 Industry benchmarks
- 5 Financial metrics
- 6 VOC insights
- 7 Chatbot
- 8 IVR
- 9 Web analytics
- 10 KPIs

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Proactive survival tip 2: Deliver the right answers



A black diamond ski run is no place for a beginner. In fact, ending up on an advanced run when you're unprepared can be dangerous. That's why avid skiers know to view maps and pay attention to signs.

The same is true of your customers when they contact your brand. They assume correct information and answers will be easy to find because you're the expert on your products and services.

Potential hazards include misinformation on the search engine. And what about your website? Perhaps the right answers are there, but difficult to find due to broken links or out-of-date information.

One of the most important things you can do to survive these potential hazards is to make it easy for customers to find the answers they are searching for on their channel of choice.



80% of customers indicate that the experience a company provides is as important as its products or services.⁴

28% click the first result in Google Search.⁵

4. Salesforce: [State of the Connected Customer, 4th edition \(2020\)](#)

5. Sistrix: [Why \(almost\) everything you knew about Google CTR is no longer valid \(2020\)](#)



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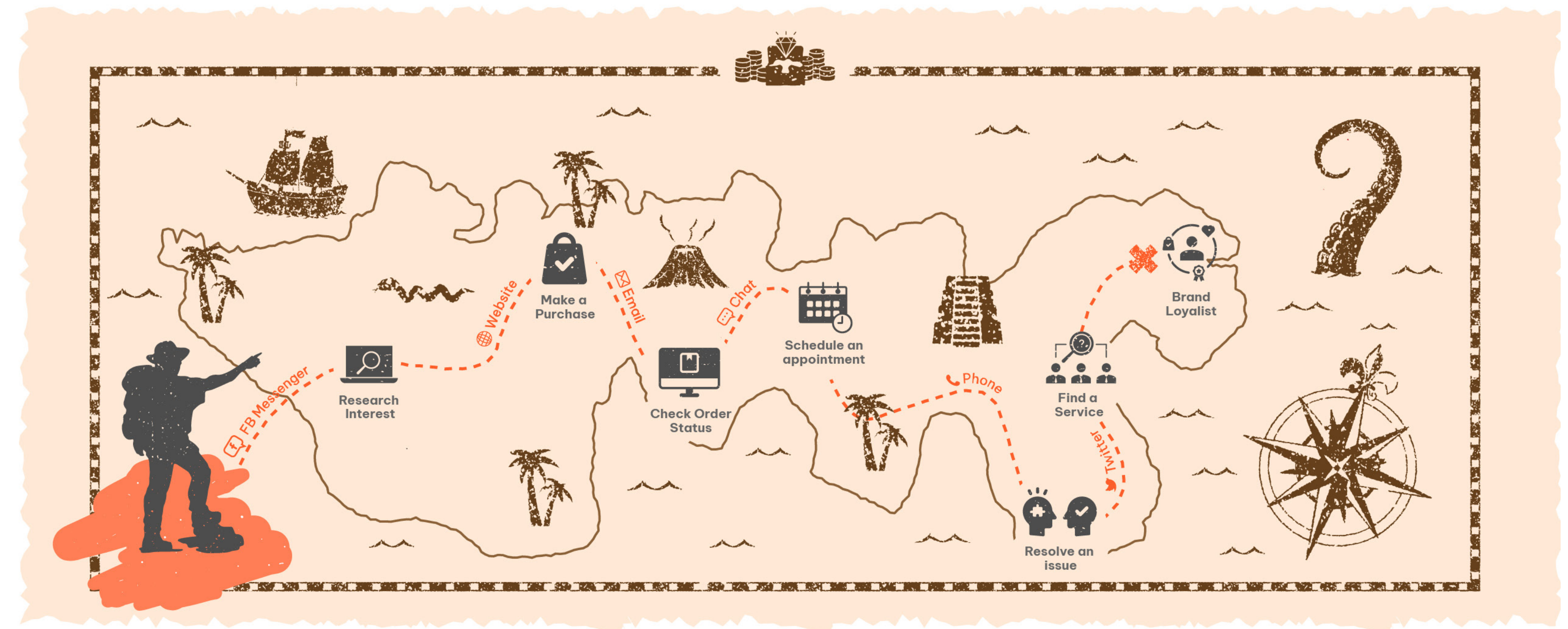
Use knowledge articles

Luckily, there are tools to help you serve up the answers customers are searching for. These include:

- [Knowledge management](#) at all touchpoints to make information easy to find
- [Real-time and historical metrics](#) and trends with integrated reporting to deliver intelligent responses on all channels

- A library of pre-built reports that are easy to access for each relevant topic or issue
- Interactive Voice Response ([IVR](#)) micro-journeys by topic and intent to reduce customer effort

Design a journey that guides customers to the answers they are searching for on their channel of choice.



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Proactive survival tip 3: Orchestrate customer journeys



Any seasoned hiker will look at trail maps before starting out for the day. Unlike outdoor enthusiasts, consumers do not map out their customer journey before embarking on it. Which means CX leaders must do that for them. Starting with each persona and potential interaction. Otherwise, your customers could wind up getting lost.

Pitfalls await customers when contact centers fail to create a proper journey with connected touchpoints and entry points along the way.

Survive these dangers by using:

- Smart self-service
- Intelligent chatbots
- Omnichannel support



63% of customers expect companies to recognize them wherever they engage, and 50% have no patience for disconnected experiences.⁶

An effective customer journey can improve customer advocacy scores by 20 to 40 points.⁷

6. Salesforce: [Trends in integrated customer experience](#) (2020)

7. BCG: [Customer journey programs are hard to get right](#) (2020)



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Use knowledge articles

Smart self-service

Digital journeys are significantly improved when customers can help themselves, no matter where they start. Conversational AI can also help deploy the most intelligent bot across all channels to proactively resolve customer issues before they happen.

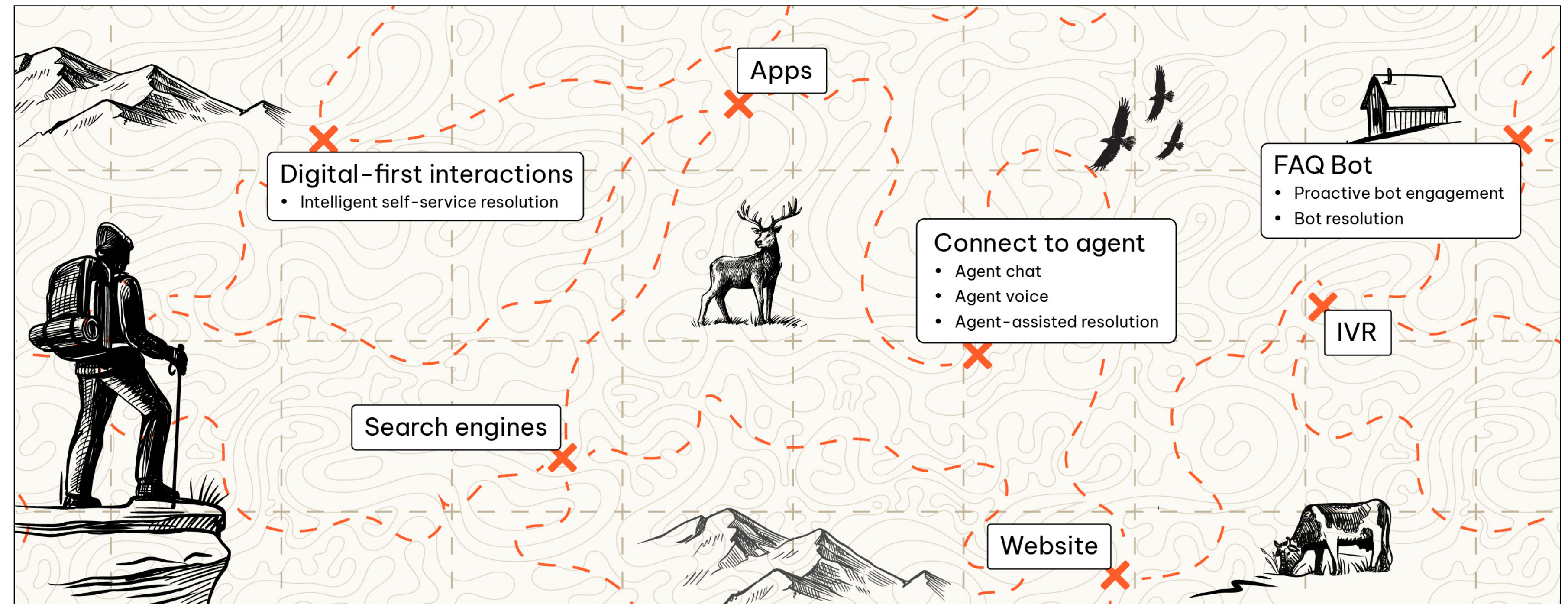
Intelligent chatbots

Chatbots are a big part of smart service because they help drive contact flow and customer experience. These bots should be compatible with all digital channels including WhatsApp and Messenger.

Omnichannel support

The final piece is omnichannel support that delivers seamless transitions between self-service, agents, and different channels. This should occur without customers having to wait in a long queue or repeat information.

Proactively designing a complete journey with up-to-date AI tools is more important than ever now that customers can start their digital interactions at any entry point. Not only can this keep your customers from losing their way, but it can also help you get them back on track quickly.



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Proactive survival tip 4: Prepare your agents



If you're hiking through a national park and you cross paths with a ranger, you expect they can correctly answer any of your questions about the park and trail. Rangers are experts, right? However, what if they're just starting their shift and aren't aware of potential dangers ahead?

Similarly, common risks can result from a lack of preparedness by your agents. How can they provide smart CX if they have to scramble for information?

You can survive these potential dangers by deploying AI solutions across all channels. Also ensure the agents have customer data in front of them at the start of an interaction.

Tools that can help your agents provide proactive service include:

- **Real-Time Interaction Guidance** that delivers behavioral prompts and insights as they are needed
- **Process Guidance** and **Automation** tools to increase employee potential with personalized, virtual resources
- **Access data, interaction history**, and **sentiment** to help reduce customer effort
- **Omnichannel experience** to enable agents to use a streamlined interface to answer customer questions faster
- **Web analytics** show which terms customers are searching for and which solutions they've already tried
- **Click-to-call** functionality used on public articles to provide more context to deliver more personalized service

I have the tools and *knowledge* to help.

Proactive outreach

Answers to FAQs

Accurate transactions

Contextual support

Preference history



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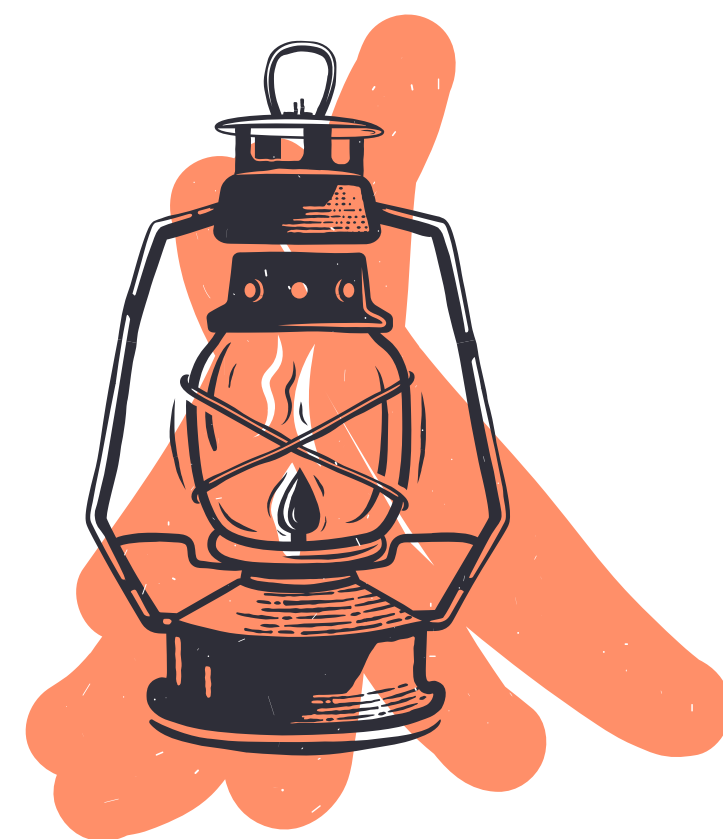
Leverage technologies

Use multiple channels

Templated messaging

Use knowledge articles

Proactive survival tip 5: Create a crisis management plan



If you're going camping in the height of the summer, it might not seem necessary to bring warm clothing, extra blankets, and sleeping bags. But what if an unexpected cold front rolls in during the night?

The same is true for contact center leadership. Forces outside your control could disrupt your services, supply chain, bandwidth, and more. And this could happen unexpectedly at any time.

Not having a crisis management plan and failing to ensure all contact center employees thoroughly understand that plan could be the biggest danger of all. Preparedness is the only way to survive such a danger.

Your crisis communication plan will be specific to your business. But regardless of the specifics, there are ways technology can help ensure your plan goes off without a hitch.



According to an ICMI survey, 96% of businesses with a disaster plan in place before January 2020 reported their strategies were at least somewhat effective. And many thrived in their new reality. Whereas only 76% of businesses that established plans after the crisis hit were effective.⁸

8. NICE CXone: [ICMI Toolkit: Ahead of the Curve: Building Agility, Proactivity, and Intelligence into Contact Centre Operations](#) (2021)



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Templated messaging

Use knowledge articles

Proactively ensure the following tools are in place before you need to use them.

Empower your agents

Using your agent dashboard, messaging, and knowledge base can help keep your front-line workers up to date and help you align your internal and external messaging.

Use multiple channels

Prepare communications that span the customer journey, including websites, social media, and [IVRs](#). Active outreach efforts should include email, SMS messaging, and automated calls.

Templated messaging

Create messaging designed for quick deployment across channels. Ensure you address your plan for future updates at intervals and how customers can get more information.

Use knowledge articles

Information can change quickly, and all communications must be up to date. Therefore, it's better to use channels such as messaging and SMS to direct customers to resources you can continuously update.

Crisis plan for CX



- 1 Message templates
- 2 Agent dashboard
- 3 Knowledge management
- 4 Chatbots
- 5 SMS messaging
- 6 Automated calling
- 7 IVR
- 8 Social media
- 9 Customer journey

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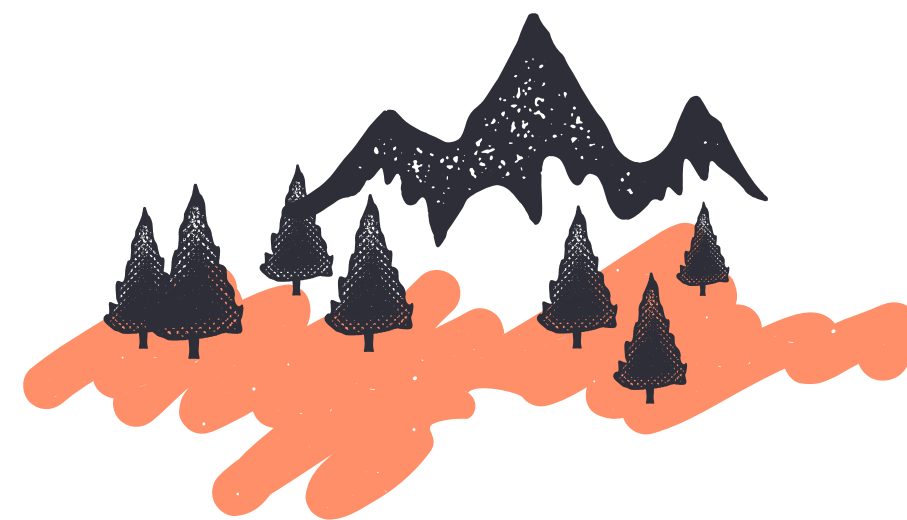
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When enthusiasts begin their outdoor adventures proactively prepared for what lies ahead, they can safely enjoy their journey no matter where it takes them. This approach will keep them from getting knocked off course by unexpected events.

With the right AI tools, you can deliver a proactive customer experience that is virtually frictionless. In order to deliver truly proactive service that guides customers along their journey to the desired resolution, you need optimized products and processes across the entire organization.

When you combine AI-driven self-service with prepared agents, you can create a proactive, smart, connected customer experience that will differentiate your brand and strengthen your customer relationships.

Learn more about how to stay one step ahead of the needs of your customers.



About NICE

With NICE (Nasdaq: NICE), it's never been easier for organizations of all sizes around the globe to create extraordinary customer experiences while meeting key business metrics. Featuring the world's #1 cloud native customer experience platform, CXone, NICE is a worldwide leader in AI-powered self-service and agent-assisted CX software for the contact center – and beyond. Over 25,000 organizations in more than 150 countries, including over 85 of the Fortune 100 companies, partner with NICE to transform – and elevate – every customer interaction.

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