

# Business user's guide to **DATA-DRIVEN CX**

Maximise your business data for deeper insights, effective automation and personalised customer experiences that set your brand apart



# Master the evolving art of data-driven CX

Today's steady stream of data is gold for your contact centre operations. Yet mining and shaping it into effective tools to drive accelerated growth for your business remains a constant challenge.

In this practical guide, written with customer experience (CX) leaders and contact centre managers in mind, we'll explore the evolving art of crafting data-driven experiences. This encompasses experiences that use data to delight customers with personalised precision, inspire contact centre employees with gamified insights and create more efficient business operations overall. By the end, you'll have gained a deeper understanding of the new tools and strategies your organisation might require to enhance automation and deliver a consistently fluid customer experience.

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# Introduction

In a **1999 interview**, a young entrepreneur named Jeff Bezos explained the secret to his eCommerce company's sudden success. "If there's one thing Amazon.com is about, it's obsessive attention to the customer experience," he said. Obviously, his strategy worked — and pioneering applications of data, automation and artificial intelligence (AI) famously informed every step of the way.

It's never too late to start advocating for a more CX-“obsessive” approach within your organisation. Anyone who grasps its mission-critical importance can — and should — pick up that banner and lead the charge. Your customers will thank you. But creating a powerfully optimised, data-driven customer experience is, of course, easier said than done. The dot-com heyday of 1999 was a simpler time.

## **TODAY'S TOP STRATEGIC PRIORITIES FOR CX LEADERS**

1. Use data and AI for customer understanding and personalisation
2. Enhance data capabilities for real-time insights, analytics and reporting

Source: Global survey of 690 CX executives, **Genesys**  
“State of customer experience” report, 2021

## Every challenge is a growth opportunity

Two decades ago, customer data came in at a pleasant trickle compared to the class-five rapids businesses have to navigate today. Still, the greater the challenge, the greater the reward. If you can begin taking proactive measures to harness your data more effectively, you'll find that the opportunities for crafting seamless, highly personalised experiences are greater than they've ever been.

A few strategic steps in the right direction can help you:

- Orchestrate virtually frictionless customer journeys
- Boost employee engagement and retention
- Deploy AI to streamline contact centre operations and accelerate business growth



**79 ZETTABYTES**  
of data were consumed  
globally in 2021

That's 79 followed by 21 zeroes.  
(For context, in 2011 it was only 5 zettabytes.)

Source: Statista, 2021

# Data-driven experiences defined

Orchestrating a data-driven customer experience requires putting intelligent data analysis in control of customer journeys. That means analysing data to arrive at insights that are practical and actionable — capable of guiding a customer's trajectory from point A to B to C as they interact with your business.

It's easy to collect and store vast troves of data. Depending on your company's technology and talent, it might even be easy to search your data for meaningful patterns, parsing the proverbial signals from the noise. It's always harder, however, to translate those signals into actionable insights that boost the bottom line.

If you're ready to reduce the guesswork involved in your CX, elevate your contact centre metrics and set your business on a better path to a data-driven future — this is the guide for you.



## data-driven *adjective*

**da·ta** | \ 'dā-tə, 'da- also 'dä- \ - **driv·en** | \ 'dri-vən \

1. Controlled, motivated or propelled by the use of data.
2. Informed or shaped by the interpretation of data.  
*"The data-driven business strategy exceeded KPIs."*

Phase 1

# WALK: CLARIFY YOUR CX VISION

## WALK

# Let yourself dream big

In this first phase, “Walk,” you’ll take the initial steps toward your ultimate goal: a new world of highly optimised, highly automated and highly personalised, empathetic customer experiences. As a business leader, you’re used to thinking strategically. Now’s your chance to suspend every sense of limitation and let yourself imagine what the most ideal customer experience would look like for your unique organisation.

## USE CASE

Imagine great support experiences like this one: Tiana was frustrated with her home WiFi signal constantly dropping. She logged into her broadband account through her phone app and, after answering a few questions from a chatbot, was asked if she’d like to receive a phone call from technical support. She said yes. An agent called a minute later and, surprisingly, not only addressed her by name but said he was aware of her connectivity issues. In fact, he’d already started running diagnostics on her line.





## Envision the ideal customer experience

Every business has a different maturity level when it comes to data-led strategies and technologies. Bearing in mind a sense of your organisation's data-driven prowess, imagine a time one to five years from now when you might achieve a more fully optimised level of CX delivery — specifically, with the help of your contact centre.

To get a clear picture in mind, try seeing things from a typical customer's perspective. As a customer, what experience do you expect? In what ways do you want a personalised experience? When has this brand put your needs first? What did it feel like? What are some practical ways the company considered your needs or wants?

Envision the quality of the experience you want to build for your customers. Consider our recipe for CX empathy for some ways to enact it.

A simple recipe for CX empathy:

### **THE RIGHT MOMENT**

- Predictive AI wisely anticipates next steps
- Chatbots proactively offer website assistance

### **THE RIGHT CHANNEL**

- Customers can engage your brand on any channel
- Switching channels to resolve an issue is seamless

### **THE RIGHT INFORMATION**

- Customer context is retained across interactions
- Product offers adapt as customers act in real time



## Ask some key questions

Consider the following questions:

- Where do you need to focus your efforts to deliver the experience you've just imagined?
- Can you already identify ways that better using data will help agents provide the right information on the right channel at the right time?
- To make that happen, what new functionality do you need to explore and consider adopting?
- Are there cultural habits or values in the workplace that need to shift to a more data-centric orientation?
- Most importantly, how can you reliably gauge if your new data-driven strategy is working?

**ONLY 33%**  
of CX leaders say their company is “highly effective” at reducing customer effort

Source: Global survey of 690 CX executives,  
Genesys “State of customer experience” report, 2021

## Once your vision is clear, consider the next steps

After you've had some time to consider these questions and envision a clearer sense of what you hope to achieve, you need to begin working backward from there to determine what you need to do. You've taken a visionary flight forward into the future; now it's time to plant your feet firmly in the present and survey the pragmatic realities on the ground.

To measure the data-driven progress you hope to achieve, you first need to establish a solid baseline.



### What agents need to know for data-driven support:

- Who is this customer?
- What are they looking for?
- What is their history of past interactions with the brand?
- Where have they found success with positive interactions?
- What went wrong in previous interactions?
- What can we recommend as the next best action to create a smoother experience?

## Establish your baseline

Start by considering the three major factors involved in a data-driven approach to CX: customers, employees and operations. All three play a role in shaping any customer journey that includes contact centre activities — inbound or outbound — as a touchpoint. Use them to triangulate your current position. As you begin to make changes, that's what you'll measure against.

From those broad categories, narrow your focus to identify both the contact centre and business performance metrics that would be the most important to track as you proceed. Determine where you excel, what still needs work, and any customer and business priorities that conflict within these three domains. Look for current sources of friction in your customers' journeys and imagine the types of numbers you'd see with an ideal CX vision.

### CUSTOMER METRICS

Consider CSAT, NPS, CES, abandon rates or CLV/LTV. Identify the best ways you're gauging customer sentiment and tracking their journeys.



### EMPLOYEE METRICS

FCR, ASA and AHT are part of the typical agent experience. But you should also consider attrition rates and use employee satisfaction surveys.



### OPERATIONAL METRICS

These include team service-level goals, workload distribution, scheduling and forecasting. They connect to greater business concerns, such as profits and loss.



## Share the vision

When stakeholders across your organisation work together to develop a long-term data-driven strategy, everyone wins.

As the CX expert leading the charge, define for everyone else's benefit what you hope to achieve, what you know you can do right now and how to prioritise projects to get closer to the goal. It's important to partner with IT leaders early in the process to jointly think through everything needed to realise your vision.



### TIP

Map it out. Chart the typical journeys in which your top customer personas currently engage. Identify known pain points. Then think through ways your data could improve these issues. Pinpoint what changes could have the biggest impact on your chosen metrics and goals — and then decide how you'll prioritise them.

## Checklist

Before you run:

- ☐ Partner with IT, whether that's the CIO, CTO, CDO or other relevant tech stakeholder. You'll need to work together.
- ☐ Make sure your vision for CX aligns with other strategic goals, so you're not wasting resources or duplicating efforts.
- ☐ Think through your chosen baseline metrics. Are they the best ones for tracking your CX improvements?
- ☐ Decide exactly which reports and analytics tools are needed to track progress.
- ☐ Propose hypothetical KPI projections for three, six and 12 months after your new data strategy is implemented.
- ☐ Collect Voice of the Customer (VoC) feedback, perhaps via surveys or online sentiment analysis, to gain a fuller picture of how customers feel about their experiences.

At the end of the **WALK PHASE**, you'll have a clearer sense of where you want to go. Now it's time to pick up the pace.

## Phase 2

# ***RUN: IDENTIFY YOUR DATA GAPS***

## Piecing the puzzle together

In this next phase, “Run,” you’re going to start putting the puzzle pieces in place. It’s an aptly named stage, because you’ll likely find yourself running around, talking to various stakeholders within your organisation who currently manage a certain pool of data. Your mission: Identify only the datasets you need — and the data you don’t yet have — to smooth out any gaps or bumps along the way to paving the customer journey of your dreams.

### USE CASE

An unexpected client meeting came up, and Roberto had to change his flight. He’d booked it through his favourite online service, but had forgotten to log in during the booking process. As a result, he couldn’t see a record of the booking in his online account. Once logged in, however, a chatbot soon appeared and asked if he needed help. He gave the bot his booking reference number, and a moment later he was able to see it in his account and rebook the flight with ease.





# The three states of data

Data — which simply means any potentially useful information — comes in many forms and from many different sources. But whatever it is and wherever you get it, it typically progresses through three states on its way to being used.



## RAW DATA

This is data in its natural, unrefined state, as it's flowing into your contact centre or generated by daily business activities. It's everything, really — from email to call recordings to online sales and retail product counts.

## ANALYSED DATA

Raw data isn't much good if you don't look at it, measure it and try to detect patterns that could provide valuable insights. Analysed data is the lifeblood of any business, but it needs to be channeled in the right ways to be useful.

## ACTIONABLE DATA

Here's where actionable data emerges — data that directly informs decisions and next steps. This includes, for example, contact centre KPIs that managers can act upon or datasets that AI tools can readily mine for real-time results.

# DATA, DATA EVERYWHERE . . .

## Digital channels

Email, live chat, bots, persistent web messaging, SMS texts and social media apps — all of this generates terabytes of customer data, daily. But siloed channels can make that data difficult to use.

## CRM data

CRM software, such as Salesforce, can be the ultimate CX data warehouse. But collecting the right info in the right fields and using it correctly is easier said than done.

## Voice recordings and IVR

Contact centre audio recordings result in a vast quantity of potentially AI-mineable insights. Tracking IVR call flows provides another valuable source of customer journey data.

## Website data

Company websites and associated business mobile apps generate extremely useful data, especially for eCommerce. This includes cart abandonment, bounce rates and user behaviour flows.

## Workforce engagement

Data isn't only for the customer journey. Contact centre engagement data provides a vast trove of information that can be used to improve employee experience and performance.

## Business data

This broadly defined category encompasses all other business activities, including products and services, sales data, HR, finance, marketing campaigns and analytics, retail inventory, logistics, and more.

## Journey analytics

To orchestrate a better CX with data, it pays to have the right tools. Journey analytics software can produce actionable data in the form of real-time journey maps that you can grasp at a glance.

## Third-party integrations

This catch-all category covers anything not included in the other seven buckets, including data from unified communication solutions, Bring Your Own Device policies, IT monitoring tools and AI applications.

## Data quality and governance

After surveying the various data streams your organisation currently captures, you might realise you already have everything needed to create more optimal experiences. Or you might have to find ways to start tracking customer journeys more effectively — inside and outside the contact centre — to get more helpful information.

This is where understanding the quality of your company's existing data becomes important, as well as how it's captured, stored and managed. Get a clear view of the existing procedures, policies and practices for data collection, storage and access within different business units of your organisation.

Next, decide how you can begin pulling together the data sources you need to boost the specific KPIs you want to track.

## DATA PRIVACY AND SECURITY

Securely managing and encrypting data and guaranteeing privacy are critically important to every organisation. Proactively communicate your privacy policies to customers and be clear about the types of data you collect, store or share with third parties. Even when it's not legally required, being as transparent as possible about how you intend to use customer information is a good way to earn trust. And that improves the reliability and quality of the experience you're providing.

## Quality questions

Some of the questions you'll need to consider at this point include:

- Think back to the priorities you determined in the “Walk” phase. How much of the necessary data do you already have?
- Considering the streamlined customer journey you want to create, can you already see where data can fill in the gaps?
- Which types of customer data can or cannot be used — practically, ethically or legally — to create the smoother journeys you want to provide?
- Have you identified unnecessary data silos separating systems, departments or communication channels?  
Ask your IT team: How can we integrate data more effectively?

**46%**  
of consumers rate a  
brand's “reliability” as the  
#1 key to their loyalty

Source: Poll of 8,681 consumers, PwC “Global Consumer Insights Pulse Survey,” June 2021

## A data-driven culture

A recent **study** of 9,000 full-time employees worldwide, published by Accenture and Qlik, found that while 87% of employees recognise data as an asset in the workplace, 74% report feeling unhappy when trying to work with it. But using data doesn't have to be so hard.

In fact, with the latest software and analytics tools, it can be surprisingly easy for anyone to gain valuable, actionable insights from data — no intimidating data-literacy training is necessary. And when everyone in the organisation feels empowered to put data-generated intelligence to use, you'll be that much closer to turning your new CX vision into a reality.

### TIP

Create a realistic timeline, and segment your plan into actionable milestones. For each step, decide what new data practices, trainings or tools you need to use at that moment to keep things on track.

## Checklist

Before you fly:

- ☐ Identify weak areas of tracking and supporting customer journeys, and decide exactly how you're going to use data to make those improvements.
- ☐ Understand the current quality and governance of your existing datasets, plus that of the data you need but don't yet have.
- ☐ Establish collaborative processes with IT and other business leaders to capture cleaner or more meaningful data — and analyse it.
- ☐ Assess how much of your staff resources you can use for this initiative and any other projects you might need to reprioritise.
- ☐ Review current staff competencies and enroll teams in the specific data literacy training they might need.
- ☐ Work closely with IT (and your CFO), and determine any additional technologies you might need, such as new AI tools.

At the end of the **RUN PHASE**, you'll be well on your way to implementing your strategy. Are you ready to fly?

Phase 3

# *FLY: IMPLEMENT AND ITERATE*



## Prepped for launch: All systems go

In the final phase, “Fly,” you’ll quickly see why nothing about this will ever be final. But first you’ve got to get your strategy off the ground. In “Walk,” you examined where you are today and envisioned where you want to go. In “Run,” you determined the data, tools and teamwork you need to reach your goal. Now, working with your IT partners, it’s time to implement it all, press the launch button — and see what happens.

### USE CASE

Parvati could hardly remember the last time her furniture company had to place a restocking order from its primary manufacturer overseas, let alone the days when she had to manually think through the logistics and arrange for items to be shipped to her retail customers. It all just seemed to flow automatically now — almost effortlessly — through data-driven systems that generate insights she can act on at a moment’s notice. And judging by the feedback she’s received, her customers feel the difference.



## Deploy your tech solutions

Keeping your previously chosen baseline KPIs firmly in mind, look at the performance of any newly integrated systems and datasets. For instance, is the data you need from your CRM system being fed correctly into your cloud contact centre solution? And is the right data from different contact centre channels flowing back into your CRM?

Mapping out system integrations and data-orchestration workflows on paper might have been relatively easy, but your IT friends won't know what's working and what isn't until they put the revamped data architecture to use.

## GET THE TECHNICAL GUIDE



## Automate and activate AI

Deploying new innovations to work with all that freshly orchestrated data — such as chatbots, voicebots or predictive-AI solutions — can make employees' jobs easier and reduce operating costs across service, sales and marketing. Bots boost customer satisfaction by enabling effective self-service support. Predictive engagement leverages data to anticipate customers' next best steps, which helps you eliminate any missteps in delivering your ideal customer journey. All of this can become actionable data to improve the customer experience.

Just bear in mind that programming and refining automation tools or machine-learning software takes time. You'll want to account for that in your deployment strategy, and be ready to continually tweak things as you go. (Consult our accompanying ["IT professional's guide to creating data-driven experiences"](#) for a deeper look at what's involved.)



## Activate your business intelligence

Once your essential data-generating — and data-utilising — resources appear to be operating as intended, you'll want to see if you're getting results. With the most commonly used contact centre software, it's relatively easy to generate customised reports and analytics. Some customer service desktop and mobile interfaces even allow agents to monitor their individual performance in real time with gamified dashboards.

But for other critical CX stakeholders in your organisation, such as sales and marketing teams, you'll need to find a way to generate clear, visually self-explanatory reports that make sense to everyone involved. This is where business intelligence (BI) software is beneficial.

**48%**  
of employees tend to  
follow their gut instincts  
rather than relying on  
data-driven insights

Source: Survey of 9,000 professionals worldwide, Accenture and Qlik, "The Human Impact of Data Literacy," 2020

## Visualise results

Data visualisation tools can unify and translate multiple datasets into more useful cross-functional analytics. After all, no one enjoys comparing and contrasting cumbersome spreadsheets created by different business units that have different terms and end goals. Analysing data can be tricky.

Leading BI applications, such as Tableau or Microsoft Power BI, can automate and otherwise dramatically expedite data analysis and reporting. They're able to translate data from multiple sources and formats into integrated, unified overviews that display your various KPIs in compelling graphical formats. Naturally, this makes it easier for everyone to see improvements.

### CONNECT THE DOTS

New customer journey analytics tools are capable of quickly translating complex data into visually attractive, interactive journey maps. They enable you to easily draw the connections between customer touchpoints and business goals, helping you see the big picture and anticipate the likely impact of your data-driven decisions.



## Continually iterate and adapt

As your CX strategy unfolds, make sure the right people in your organisation have visibility into the data they need to analyse it effectively and track progress. Everyone needs to know if the actions they've taken have a positive effect on your chosen KPIs. If not, teams may need to change tactics.

This is where an iterative, cyclical approach is essential: Activating, analysing and adjusting — continuously getting better at understanding what your data is telling you and optimising your approach. Small tweaks at the right touchpoint — whether that's in the realm of service, marketing or sales — can go a long way.

Remember: Data comes in many forms, not just easily quantifiable KPIs. Directly engaging customers to elicit insightful VoC feedback remains one of the most important ways to gauge if your CX delivery has really improved.

“Expecting employees to work with data without providing the right training or appropriate tools is a bit like going fishing without the rods, bait or nets.”

**Jordan Morrow**, Chair of the Data Literacy Project Advisory Board

## Checklist

To fly higher:

- ☐ Ensure data orchestration efforts are well on their way to generating the results you want.
- ☐ Continually realign on data-driven targets between service, sales and marketing to stay on the same page.
- ☐ Reconsider your chosen KPIs. Are they still the best ones for tracking CX improvements now that new tools are available?
- ☐ Are you using workforce engagement management and unified communications and collaboration solutions to bridge internal knowledge and data gaps?
- ☐ Contrast your latest KPI figures against your original baseline. Check against your original projected ideals in the “Walk” phase at three, six and 12 months.

As you start to **FLY**, your data will reveal ways to revise and optimise plans. Work with your friends in IT to prioritise resources. Many organisations partner with a third-party company like Genesys to fully implement this phase.



# Conclusion

Disjointed customer journeys result in poor experiences, and those undesirable results impact every aspect of a business. By continually analysing everything you know about your customers and the ways they interact with your brand, you can demonstrate, in real time, that you empathise and care. Data-driven CX strategies create the kind of fluid experiences that keep customers happy, engaged and coming back for more.

If new data insights reveal previously unseen bumps and detours in your customer journeys, that's a good thing. With skillful applications of data reducing the guesswork, you'll know exactly what to focus on and improve over time.

Genesys can guide you through part or all of this process to improve data-driven experiences and service delivery. We've pioneered Experience as a Service<sup>SM</sup> to help organisations of all sizes provide true personalisation at scale, interact with empathy, and foster employee and customer trust and loyalty — all through the power of the cloud.

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

- Automate the capture of data to analyse
- Deploy AI tools that boost contact centre KPIs
- Establish clear ways to continually improve your data-driven customer journey orchestration

**SPEAK TO AN EXPERT →**



## ABOUT GENESYS

Every year, Genesys® orchestrates more than 70 billion remarkable customer experiences for organisations in more than 100 countries. Through the power of our cloud, digital and AI technologies, organisations can realise Experience as a Service<sup>SM</sup>, our vision for empathetic customer experiences at scale. With Genesys, organisations have the power to deliver proactive, predictive and hyper-personalised 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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