CX NETWORK

The Role of Customer Insight, Data & Analytics in the Multi-Channel Contact Centre



How to improve customer satisfaction levels through actionable insights and quality assurance.

Scorebuddy
QUALITY SCORING SYSTEM

CX NETWORK MARKET REPORT



About the Author



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Contents

Introduction	Page 3
The Impact of Multi-Channel on Contact Centres	Page 3
Why You Need to Utilise Customer Insight, Data & Analytics	Page 5
Measuring Quality in a Changed Customer Interaction Landscape	Page 6
QA: How to Solve Performance Issues and Increase Customer Satisfaction	Page 9
Case Study: How Ryanair Tackled the Customer Service Challenge	Page 10
Top Tips: How to Turn Customer Data Into Actionable Insights	Page 11
About CX Network	Page 12
About Scorebuddy	Page 12



Introduction

We are in a new age of the contact centre. We're living in a multi-channel world where the customer has never been more vocal and digital channels provide a platform for constant feedback – both positive and negative.

But what does this new environment mean for quality assurance (QA)? How do you define quality in this fast-paced digital age and get to the root-cause of the problems? And what are the new measurement metrics that come into play?

In this report we look at what multi-channel means for the contact centre, how to utilise customer insight, data & analytics to optimise customer service, and how to solve performance issues and increase customer satisfaction levels in this new age of the contact centre.

The Impact of Multi-Channel on Contact Centres

We have come a long way within the customer service industry since Automatic Call Distribution (ACD) technology in the 1960s. One of the biggest changes undoubtedly being the shift from a voice-only call centre to the multi-channel contact centre, which encompasses any and all customer contact points, from web chat and email to social media and self-service.

A New Strategy

Multi-layering the channels adds complexity to the strategy, Petra Mengelt, Customer Service Director of Fintech business Euroloan Group PLC, pointed out. However, it also provides a great opportunity for organisations. Not only because they'll be able to gauge customer feedback and insight from multiple touch points and utilise this information to optimise processes, but also because the threshold for customers to contact you has become much lower.

Petra explained: "With a 9 to 5 telephone service, customers will find an excuse not to contact you but with multiple contact points available they can choose the best time to reach out. However, even though we're open 24/7 people don't call at 3am. It's the idea that appeals to them; the brand image. Euroloan is always open and customers remember that choice."

It's important to give customers a choice between channels so they can opt for the contact point most convenient for them, and the one they're most comfortable using. It's no longer possible to just focus on voice, as digital (social media, web chat, apps, etc.) already accounts for over 35 per cent of all customer interactions. In fact, digital channels are expected to overtake voice as soon as next year. Having a multi-channel model in place in your contact centre is a must to stay ahead of your competitors and deliver the service customers have come to expect from brands.

Omni-Channel

With the proliferation of contact channels, it's more important than ever to have a solid strategy in place to manage these different touch-points. Omni-channel, where a business has a single view of the customer regardless of contact channel, is considered by many to be the new nirvana of customer service.

> "As the agent moves between different channels (calls, chat, email, etc.) they will bring with them some best practices that might be lacking in other channels and they may be able to highlight these to the channel manager."
>
> **Dick Bourke, Director, Scorebuddy**

A customer might first email in with an enquiry or to make a complaint and then move onto social media for convenience, or because they feel they will receive a swifter response through that channel. As a result of this interlinked approach to contact channels, there will be fewer requirements for customers to provide personal details or background information of prior interactions. The customer service agent already knows about all of this and can provide a quicker and more informed service. This will not only speed up processes and free up the agent's time to help more people, but it will also result in a much happier customer.



There are however a number of things to keep in mind when looking at an omni-channel approach because this level of SaaS comes with a price tag, and not just a financial one. There are a number of hidden considerations that need to be thought through.

- Existing/Legacy systems: Will this new software integrate well with your existing or legacy systems? Omni-channel will only work if each of the systems connect via a stable, well-built API.
- There is the cost of your IT departments' time as well as the time away from other projects that may be just as important.
- Omni-channel can be expensive and beyond the reach for many.

The Implications of Becoming Multi-Channel

There are several implications that relate to the customer service agents.

- **Varying Skillsets:** Each member of your team will have a certain skillset. One agent may be able to develop a real empathy with your customers, another may have a fantastic technical understanding of the product that you are supporting, while another may be particularly comfortable using your internal systems making for an efficient call. It is unreasonable to expect individual agents to be equally proficient across all channels.

> "Contact centres are a mine of data and information that combined can give a really insightful picture of improvement opportunities from a customer point of view."
>
> **Dawn Cox, Customer Service and Contact Centre Director, Staples**

- **Channels:** Likewise, each channel has different demands and expectations meaning that certain agents will work better with certain channels. To perform well on a call your agent will need to use listening skills, empathy, tone-of-voice and sense of humour. A live chat or an email will rely heavily on the agent being able to communicate using the written word alone.

There will be a reasonably clear skills match between your agents and the channels that you support. Superstars are identified when their skillset can be utilised across each of the channels, this will help with WFM and improve attrition rates amongst your agents. Dick Bourke, Director of Scorebuddy, illustrated the benefits of this:

> "With a 9 to 5 telephone service, customers will find an excuse not to contact you but with multiple contact points available they can choose the best time to reach out."
>
> **Petra Mengelt, Customer Service Director, Euroloan Group PLC**

"We attended a presentation recently given by a customer of ours where they spoke about staffing and attrition rates. When looking at those that were considering a career in the call centre space, they realised that getting staff trained up on different channels/desks helped to develop the agents' understanding of the business and its products.

"As the agent moves between the different channels (calls, chat, email, etc.) they will bring with them some best practices that might be lacking in other channels and they may be able to highlight these to the channel manager. For example, the usual warm greeting on a call might not be part of the live chat template. The brevity of a twitter post might highlight the fact that an email is too wordy. We call this cross pollination."

- **Measurement of the Various Channels:** As a hangover from a time when we were only measuring calls, customer service teams need to be measuring chats, emails, social media, etc. in different ways. For example, a call might be measured by handling time or first call resolution. A chat might be measured by a different response time or it might look at idle time on the chat.

How these interactions are measured need to be bespoke for that channel.

[1] http://www.forbes.com/sites/scottdavis/2016/07/14/how-amazons-brand-and-customer-experience-became-synonymous/#37aafb901279



Why You Need to Utilise Customer Insight, Data & Analytics

One way to make the most of these channels and reach your contact centre goals in this multi-channel world, is by utilising customer insight, data & analytics. Really knowing your customers by studying their behavioural patterns and joining up all interactions they have with you as an organisation is an important factor of any successful 21st century customer service strategy.

Customer insight, data & analytics are key elements to gauge customer feedback and address the root-cause of performance issues. Utilising this information in the right way can lead to a more memorable experience, increased satisfaction and better retention. But the industry is changing at a rapid pace and with a proliferation of contact channels and disrupting brands entering the market, it has also never been more complex. Flexibility is key, so you can stay on top of technological developments and continue to improve performance and processes.

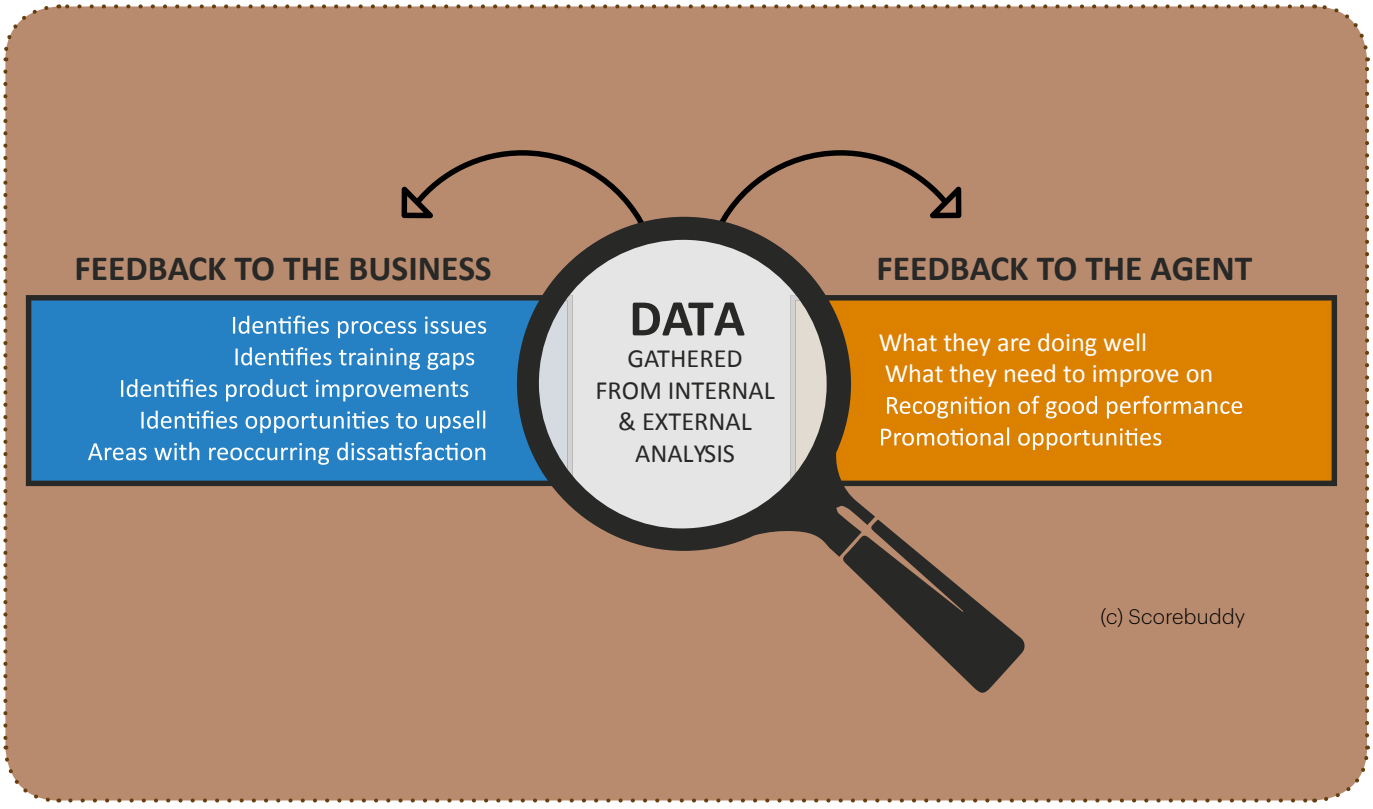
Ultimately, what are the best ways to use customer insight to get to the root cause of problems and improve overall customer service?

In short, we need to collect the data from interactions, we then need to process that data and turn it into something meaningful, and then we need to pass this meaningful data back to the agents, the customer service manager and the wider organisation.

We are living and working in a time where collecting the data is generally understood as a must do. Organisations around the world are collecting all forms of data on their customers. This can range from the number of items a customer has bought, to the number of times they've reached out to the customer service team.

Data is fantastic, but it is also useless unless it is analysed and turned into actionable insights that the company can use to develop their product or service.

The data that is collected needs to be relevant.





Measuring Quality in a Changed Customer Landscape

The way in which feedback is captured to gauge customer satisfaction has seen a big overhaul in recent years. Traditional contact quality measurement metrics included time on call and waiting time, but in a digital world, where customers can suffer from survey fatigue, customer sentiment measurement tools have expanded to include elements such as speech and text analytics and social media monitoring.

Customer sentiment can also be measured at the moment of truth, i.e. the interaction between the customer and the agent, gaps in CSAT survey data can be filled using a well-designed internal quality monitoring framework.

Where Does Your Data Come From?

Not only is it important to capture customer feedback through multiple channels and quicker than ever before to be able to fix quality issues 24/7, but Forrester has found that 53 per cent of customers are likely to abandon their online purchases if they can't find quick answers to their questions online[1]. Furthermore, you need to gauge customer's emotions for a complete 360-degree view.

- **External Data... Surveys:** Many organisations will focus on surveying the customer post interaction.

  Of course surveying your customers is paramount when trying to understand how your customer service team is performing. This serves a number of functions outside of the obvious collection of feedback. Customers will feel like they have been listened to. In the case of a negative interaction, the survey is an opportunity for the customer to vent any frustrations (before they take to social media). And surveys can identify complaints at an early stage, enabling the customer service team to handle the complaint early and fix the problem.

  As consumers, we are being asked to participate in surveys on a regular basis. So when you ask your customer to take part in a post-interaction survey don't be surprised if they don't respond as well as you'd hope. Caroline Wells, the Head of Customer Experience and Insight at the Financial Ombudsman Service, explained what survey fatigue is and how it impacts gathering customer feedback. She said:

  "The implications of survey fatigue are that people are not giving their whole selves when they're completing surveys anymore. You're not getting a true representation of how customers are really feeling, because they're feeling bored of the whole process. The integrity of the data you pull from the surveys people complete these days is different because it depends on where they are at and how much time they're willing to invest. If they don't get anything back for it, it starts to show in the survey results."

> "For me interpreting the data is the easy part, but telling the story is the thing you have to crack."
>
> **Richard Tate,**
> **Head of Digital Insight, EE**

With that said, Dick Bourke understands survey fatigue very well and how best to avoid it. He said: "We know that customers are being asked to participate in surveys on a regular basis and we know that survey fatigue exists. We believe that survey fatigue develops when a survey is too long and/or sent out hours, or even days after the interaction. We have learned from talking to our customers that a short, well-designed, timely survey will be well received."

Petra Mengelt added: "Phone is a good traditional method, but voice analytics is a hard language and not necessarily the best channel. Email is an easier channel to gather information from, and so is chat. For chat we started out simply by asking whether a customer liked the chat they were having by presenting them with the choice of a happy and sad smiley face. Then we looked at the negatives. What went wrong? Did the problem get solved? Did they need to call

[1] http://blogs.forrester.com/kate_leggett/16-01-28-online_self_service_dominates_yet_again_why_its_an_effortless_way_to_get_to_your_answers



instead? It's crunching data. We don't have a tool for this yet, however. We have used Excel for this so far and I need a really good recommendation."

- **Internal Data:** Sampling and scoring customer interactions internally is equally valuable when trying to understand customer sentiment. This involves listening to a recording of the call, reading the transcript from a chat or monitoring the thread from an email interaction. This is a qualitative approach that will take a deep dive into the interaction. Combining this with survey data, you will not get a more comprehensive version of the truth.

  Julie MacIntosh, Training and Quality Manager at S2G, a provider for outsourced customer response solutions, explained: "Our quality assessment tool allows our organisation to not only to give valued feedback, but to also analyse trends with ease. In these trends we can see our strengths and our areas that need coaching and training. It helps us promote a culture of understanding, learning and growth not only for those dealing with customers directly, but also for our managers, training departments and the organisation as a whole".

  By surveying the customer as well as analysing the call/email/chat itself, quality managers will get a 360° view of the service.

Sentiment

Organisations are looking at new ways to capture and measure customer insight. There are text and speech analytics tools on the market that capture insight near real-time, even analysing whether the customer is happy or angry from tone of voice, but these tools have their limitations.

Speech recognition tools will identify the words that were used during a call, but context is everything. For example, a call might end with the customer saying "thanks a lot"; this can be a genuine response to good service, but those very same words could also be a clear indication of a disappointed customer. Speech recognition tools don't 'do sarcasm'.

With the rise of digital channels, and social media already being the number one contact choice for Generation Y globally[2], it's important to understand how to use this information effectively, and this includes understanding the context.

Organisations have to look at ways to capture customer insight through all digital touch points and integrate the feedback with that of the more traditional channels for a complete view of the service quality they're providing.

Defining Quality

But how do you define the quality of an interaction? Are these tools able to pick up on the subtle issues that can make or break a customer relationship? What is quality in the modern contact centre anyway? You have to look at the emotional engagement a customer feels with the brand and the experience they had.

Dawn Cox, Customer Service and Contact Centre Director at Staples, explained: "Leading practices in quality monitoring are not about compliance. They are reflective of a company's objectives and the customer experience they are trying to create. 'How did the interaction make the customer feel?' is now the key question. There is a place for compliance checks, but they are exactly that; checking compliance for regulation rather than for the quality of the customer experience."

> "In order to get continuous improvement you need to turn data into information."
>
> **Dawn Cox, Customer Service and Contact Centre Director, Staples**

Dawn went on to outline how, in an age of proliferated contact channels, organisations can measure customer service quality on and off calls. "We have a quality model structure that works across all interactions with a customer, from calls, to emails, to social media and web chat. It focuses on four stages of a customer interaction: the engagement with the customer, the ability to assess the customers' requirements, the solution(s) offered to the customer, and the

[2] https://www.dimensiondata.com/Global/Downloadable%20Documents/2015%20Global%20Contact%20Centre%20Benchmarking%20Summary%20Report.pdf



attitude and approach to the interaction.

"We do not have a score associated to the quality model, but four levels that the reviewer awards to a contact based on a decision tree and coaching guide. We implemented this in the last 12 -18 months to give a customer experience focus to the model and stop people being hung up on a score."

Dick Bourke, Director at Scorebuddy, added: "Conveying performance results to the agent should always be handled with diplomacy. Some organisations use a traffic light system where green represents a good result and red represents a poor result. This is a more visual way to let the agent know that they need to improve in certain areas, however organisations still need to be collect numeric data for trending and detailed analytics."

And where is the future of quality measurement within the contact centre heading?

Organisations have started to move away from using spreadsheets to assess quality and are now looking for purpose built Quality Assessment (QA) tools.

Quality is no longer all about compliance. Quality is a living and breathing function that should feed actionable insights back to the business.

"There will be an even greater focus on customer experience." Dawn Cox from Staples said. "There will be a definite move away from numbers and scoring in order to overcome the often negative feelings of advisors to quality measurement, and achieving greater engagement in the need for quality measurement to lead to continuous improvement."

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QA: How to Solve Performance Issues and Increase Customer Satisfaction

When you have your insight processes set up for all the customer touch points in your multi-channel contact centre, what is the best way to use this to solve performance issues and increase customer satisfaction?

First of all, it's a constantly changing and evolving, ongoing process. Petra Mengelt from Euroloan Group PLC said: "It should be a frequently visited issue within the team all the way to the steering crew with internal audits to remind them and keep it up there as key process.

"I bring it up with every team meeting and take it down all the way to the reps. I tell them 'This is what we did, how can we improve it?' Bring a natural, almost neutral way into the system to show that we're not competing individually. Everyone makes mistakes but the quality relies on keeping it together."

> "The integrity of the data you pull from the surveys people complete these days is different because it depends on where they are at and how much time they're willing to invest. If they don't get anything back for it, it starts to show in the survey results."
>
> **Caroline Wells, Head of Customer Experience and Insight, Financial Ombudsman Service**

And Dawn Cox from Staples concluded: "In order to get continuous improvement you need to turn data into information. Whilst pages of verbatim comments raise an emotional response in your organisation, they won't drive a sustainable approach to continuous improvement.

"Contact centres are a mine of data and information that combined can give a really insightful picture of improvement opportunities from a customer point of view. For that to happen it is vital to drive accountability for reducing or eliminating issues at root cause by assigning ownership to operational areas to improve and feedback to the organisation."

Three Quality Measurement Pitfalls – And How to Avoid Them

Dawn Cox from Staples said there are some pitfalls of quality measurement that are easy to trip over, even with the best intentions in mind. Here she outlines the top 3 things to think about to ensure an optimised QA strategy.

a) One Size Does Not Fit All

You can have a standard approach and standard structure to quality measurement but often the skills and behaviours differ by interaction to create the right customer experience for different circumstance.

For example, a customer placing an order will view a positive interaction differently to a customer with a complaint, so you need to allow for that difference when structuring the quality monitoring approach.

b) Technology is Not the Only Answer

The best quality measurement technology can certainly help but it really needs to be paired with a team of well-trained performance coaches in order to drive improvements in the front line.

c) Calibration is Key

Deploying a quality measurement process without regular calibration sessions means you run the risk of a disparity in scoring and a misalignment on what good looks like.

CASE STUDY

How Ryanair Tackled the Customer Service Challenge

RYANAIR

Low-cost airline Ryanair was founded in Ireland in 1985. In 2013 Ryanair was the biggest international airline when it came to passenger numbers, and the largest European airline by passengers they carried. That very same year they made a pledge to the world media, and to their 90 million annual passengers, to make customer service their priority.

The Challenge

Ryanair had a number of outsourcers in place to handle the significant customer service function. One of the challenges from this is to create consistency across the vendors. They needed something in place so that they could manage the service from each of the vendors, something that would give them visibility over the entire customer service function.

The Initial Implementation Phase

Ryanair initially used Scorebuddy to measure 50 customer service agents. The value was seen immediately as their quality team saved hours every week by not having to struggle with the process via spreadsheets, and the team has found it easy to use.

Clodagh Rochford, Customer Service Manager at Ryanair, added: "I put in a date range and the information is all there, right in front of me, instantly. It's a lot faster and much more flexible than using Excel, which is far too time consuming. Using Scorebuddy has meant that our quality monitoring is more automated. Having a log of all the customer service monitoring activity is very useful. If you use it once, you know how to work with it, it's very easy."

Across the Support Function

Today, Ryanair has rolled out Scorebuddy to over 600 members of staff. They took a strategic decision to have a unified quality system in place throughout the customer service operations both in-house and offshore. It is paramount to have consistency across each of the teams, especially since multiple outsourcers are being used.

Dominika Abramyk, former Senior Customer Services Manager for Ryanair, explained that their customer service team in Dublin forms the cornerstone of their quality programme. They set benchmarks that all of the call centre agents are monitored on, in-house and outsourced.

How Scorebuddy Stands Out

Ultimately, Ryanair chose Scorebuddy over other available products within the market because it is easy to use, intuitive and quick.

"Scorebuddy is absolutely fantastic," Dominika continued. "I have been using it for many, many years, in a previous role before Ryanair too, and it is very easy-to-use. The structure makes sense; how to set up sections, questions, scorecards, etc. – it's all very user friendly and quick."

Veronika Halouzkova, Senior Customer Service Manager at Ryanair, believes that Scorebuddy has helped to put a structure in place with regards to quality, because all of the data is in one place.

Veronika said: "Historic reporting means that we can dig deep into the past performance and we can really understand the issues. We can run reports on individual agents if necessary as we have a database of Scorecards that we can use. We use Scorebuddy to assess the quality across three call centres. The calibration module enables us to make sure there is consistency across the entire Ryanair customer service.

"Building scorecards is quick and easy. They are also flexible, which is of real use for us. Quality for us is a living and breathing process and Scorebuddy is flexible enough to help us."

Conclusion

Ryanair needed to unify the quality programme from their headquarters in Dublin. They needed to be able to measure the customer service function in-house, they needed to develop consistency across outsourcers, they needed to create benchmarks (in terms in scores), and they needed to have full ownership over the quality programme.

Scorebuddy has become central to how Ryanair manages the quality and consistency of their customer service function. The reporting module is being used to report on each of their channels, across all of their vendors and has given them a more structured view of what is happening. It has also given them a superior understanding and control of their customer service.



Top Tips: How to Turn Customer Data Into Actionable Insights

We've spoken about the role of customer insight, data & analytics in the multi-channel contact centre, but how can you really ensure that the data gathered is turned into actionable insight that will solve customer problems, understand customer expectations and ultimately enhance the customer service you're providing to strengthen your brand? We asked our community of industry experts for their top tips for achieving just that.

"Start with the end in sight: what are you going to do with the insights. Keep in mind that good insights now may be better than perfect insights 6 months from now."

Juan F. Gorricho, Chief Data & Analytics Officer, **Partners Federal Credit Union, The Walt Disney Company**

"Always keep in mind the business need. It's easy to get distracted by all the fun things you can do with data, but if you remain focussed on the main objective of the analysis you're much more likely to deliver an actionable insight."

Patrick Osborne, Head of Strategic Insight & Reporting, **QVC**

"Share the information – not just once but on a regular basis. It is too often that data is behind locked doors. The more people know the more they understand and, therefore, the more involved they are."

Petra Mengelt, Customer Service Director, **Euroloan Group PLC**

"For me interpreting the data is the easy part, but telling the story is the thing you have to crack. It starts with the message – be really clear about what action the insight should drive, understand who your audience is and tailor the message for that audience. Always be clear in your mind what outcome you are looking for."

Richard Tate, Head of Digital Insight, **EE**

"Focus on and get very good at solving one business problem at a time. For example: 'who is the audience for my brand in a certain country?' Get really, really, really good at solving that business problem. That means don't try to help with everything. Say no to a lot of things until you get very good at one thing and then move onto the next one. It is about understanding what the problem is and solving that, then comes the action."

David Boyle, EVP Insight, **BBC Worldwide**

"Tell a story. It might be a pretty boring story compared to your favourite novel, but translating data into prose like 'this is what we see, this is what we think is happening, this is what we think we should do' goes a long way. In my mind there are few things worse than a presentation comprised only of a data-dump without clear implications and recommendations."

Andrea Lopus Cardozo, Director, Consumer Insights, **Pandora**

"First of all, you need to fix a goal. It could be a very limited one, but it's needed to start measuring the impact and learn from it. It's also important to be able to manage the data internally as in the beginning it will cost time, energy and money. Afterward, with engaged people (top management), you will have to be patient in order to collect results and make it grow. You need to prove to others it's possible, measurable and valuable, even if it's not immediately tremendously successful. Start small, be patient and focus."

Damien Bourgeois, Head of CRM and Customer Intelligence, **AXA Belgium**



About CX Network

CX Network is an online resource for customer experience professionals providing value-rich content such as industry reports, customer trends, best practice, latest industry news, interviews with CX leaders and so much more! Our focus on the content that matters to customer experience leaders most, allows us to cut through the white noise that surrounds this ever-changing subject, and makes us the primary resource for CX executives to turn to.

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2017 Market Report Calendar

Each month CX Network's editorial team produces an exclusive report in-house. The monthly market reports are topic specific, and the quarterly research reports (highlighted in Bold below) are more in-depth insights into the global market.

January
Tackling Loyalty Challenges in Telecoms

February
How to Overcome the Biggest Challenges in Retail

March
The Customer Experience Buyer's Guide 2017

April
Making the Most From Customer Feedback & Analytics in Financial Services

May
Digital Marketing Trends 2017

June
The Global State of Customer Experience 2017

July
How to Make CX Your Competitive Differentiator in Travel

August
The Role of Voice Biometrics in the Contact Centre

September
The Big Book of Customer Insight, Data & Analytics 2017

October
Keeping the Customer at the Heart of the Digital Agenda

November
How to Create a Customer-First Company Culture

December
Customer Experience Predictions for 2018

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