

White Paper A Guide to Sustainable Business Success

# Powering CX and Employee Engagement with Workforce Management



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## Executive Overview

Business leaders face a number of challenges from within and outside their organizations. Profitability and business growth, customer loyalty and advocacy, the acquisition and retention of top talent, corporate reputation, change and risk management are major responsibilities and senior managers need to master them all in equal measures to achieve true business success.

At first glance, there are more questions than answers: how to keep customers satisfied when their loyalty is decreasing and yet their expectations are increasing? How to connect the silos across the business? How will technology influence the way companies do business and what will be the real impact of Artificial Intelligence (AI)? In a rapidly changing world, how do business leaders keep their teams one step ahead of the competition?

In Teleopti's experience with customers, two areas are vital to achieving business success that endures over the long-term, these are effective customer experience (CX) and employee engagement. At the same time, digitalization is transforming and enabling the way organizations do business with customers, and engage internally with employees.

Moreover, business leaders have a powerful role to play. Research from Teleopti's partner, [Dimension Data](#), concludes that "developing a CX-centric, market-relevant strategy that's driven from the boardroom will help to create more value for customers and the business." This white paper outlines 3 key strategies to achieve sustainable business success by using Workforce Management (WFM) technology to power CX and employee engagement.



## 3 Top Strategies for Sustainable Business Success

### 1. The importance of powering CX



From boardrooms to meeting rooms, there's an overwhelming recognition of the importance of CX – particularly when it comes to building customer loyalty, which 87.2% of organizations agree can be directly linked to commercial success. CX is still the number one measure of strategic performance.

Dimension Data



Having loyal customers who offer guaranteed revenue streams and additional opportunities to cross-and-upsell drives profitability and creates an effective structure for future growth and expansion plans. What is more, successful organizations are those that turn traditional thinking on its head. By moving away from reactive cost-saving CX to proactive profit-making, it becomes easier to maintain a positive corporate reputation and enhance customer advocacy.

#### Recommendations for success

- Recognize the value of loyal customers
- Move from cost center to profit-maker
- Truly listen to your customers
- Reduce customer effort
- Invest in the right technology
- Put data at the heart of everything

#### Turning customer journeys into business journeys

Many organizations view CX and in particular the contact center as a drain on resources rather than a valuable, profit-making exercise. However, companies that put too much emphasis on what the business needs often risk alienating loyal customers. Take inspiration from Vasili Triant

from Cisco who was guest speaker at Teleopti's recent Americas User Forum. He hailed 'Customer experience (CX) is king' as the new mantra for businesses success. The simple logic is if the customer experience is good, increased revenues will naturally follow. Building an organization that is fuelled by CX makes sound business. Senior managers have the ability to instil the right culture and supplement new thinking with strategies that transform the contact center into a profit-making powerhouse. Consider the following approach:

- **Listen to the voice of the customer** – first, listen to your frontline people – they know if customers are happy and what works. Support this feedback with CSAT (Customer Satisfaction) surveys reviewed alongside customer retention or customer churn measures to establish customer loyalty. Remember to take time to know what's happening on social media and use this valuable intelligence to underpin an efficient CX strategy.
- **Reduce customer effort** – consider how easy your organization is to do business with, across each communication channel or touchpoint. In addition to using survey tools at the end of a conversation or transaction, ask specific questions at various steps along the way.

It will become clear where friction occurs in the customer journey and where improved scheduling and planning of employees using automated WFM is needed to enhance CX. According to [Gartner](#) If a customer has a low effort experience with a brand, there is a 94% chance they will repurchase.

- **Technology for technology's sake is a big mistake** – by all means, consider emerging technologies such as AI but ask yourself what they really mean for your customers and the business, and the potential ROI. Invest in the technology that matters, is actually used and is user-friendly.
- **Put data at the center of everything**
  - data should be four things: contextual, suggestive, pre-emptive and predictive so that frontline employees have the information they need to go beyond basic, reactive enquiry handling towards anticipating a customer's every need – from the channels they prefer to the products they might buy in the future. Make data intelligent and actionable across all channels by way of a WFM solution with integrated business intelligence (BI) tools and dashboards. Use data to report on previous interactions and employee behaviour to enhance CX and staffing requirements in the future.
- **View automation as the business enabler**
  - blending the right culture with automated technology will accelerate customer loyalty and business success. Cloud-based WFM

solutions promote consistent planning processes that ensure the right-skilled people are available at the right time to deliver exceptional customer journeys. Aim to build a tightly integrated technology eco-system that unifies different systems and supports collaborative customer care. That way, employees can quickly locate subject matter experts across the business to drive satisfying customer interactions. Put intelligence at the forefront of customer self-service and leverage machine learning to solve simple interactions. This leaves customer-facing employees with time to devote to more complex or sensitive issues.

As discussed in the next strategy section, automation plays an important role in employee engagement by empowering and motivating staff to find innovative ways to serve customers.



We don't utilize Teleopti WFM as just a Workforce Management platform, we utilize it to really envision our customer strategy for years and to be able to use the tool to model those strategies. We find that this tool allows us to have a really quick turnaround from when we come up with a customer strategy all the way to when we're able to implement it, because it is so powerful.

Angelo Arezzi, Director,  
Operations Support at Web.com

## 2. The new rules of employee engagement

When [Econsultancy](#) conducted its survey of digital marketing trends, it asked companies to state the single most exciting opportunity for 2019. CX came out on top: 86% of buyers are willing to pay more for a great customer experience, 73% of buyers point to customer experience as an important factor in purchasing decisions and 65% of buyers find a positive experience with a brand to be more influential than great advertising. These statistics underline what Teleopti has suspected for some time. Rather than focus on products and price, leaders should change their business models to put the customer at the heart of everything. As a result, the dynamics of employee engagement are shifting across every single part of the organization.



For example, there was a time when the contact center dealt with customers, leaving the accounts department to worry about the numbers, marketing to think up smart publicity campaigns, product management to develop exciting technology and operations to make sure the warehouse had enough stock to fulfil sales orders. The shift from product to customer service is turning everything on its head. To be truly customer-focused requires energy and a attention from everyone. The conversations accounts, marketing, product management and operations have with their customers – inside and outside the organization – are just as relevant.

### Recommendations for success

- **Up and cross-sell the CX philosophy**
- **Future-proof customer care from within**
- **Maximize your human capital**
- **Involve and devolve**
- **Infuse AI into the employee experience**

### Make everyone a CX champion

To deliver the best customer experience, the entire organization has to work together, pool its knowledge and re-think processes. Everyone should develop the skills traditionally associated with customer care representatives and become highly adaptable, good communicators, problem solvers, excellent listeners and rapport builders. Similarly, managers of all divisions should ask themselves a new set of questions: what are our goals? How should we plan our people and processes? How many people do we need and what are their roles? Essentially, how do we galvanize our people to deliver on our customer-first promise?

Create an effective team of CX champions in the following ways:

- **Up and cross-sell the CX philosophy** – begin by putting together a CX taskforce and include representatives from your contact center. As seasoned experts in the field of customer care, they have a strategic role to play. They know instinctively to work closely with other departments to get the answers and support they need to think outside the box and come up with new ideas for delighting customers. Use their experience and make them ambassadors of customer service best-practice principles, ethos and learning. Supply them with collaborative tools, such as internal chat and enterprise social media, to share learning and tips for improving customer service swiftly and consistently across the whole organization. Think about planning times, using WFM schedules, for customer care representatives

to attend sessions and access questions to highlight the importance of the new CX philosophy. Very soon, you will create an interconnected customer care network that is poised for success.

- **Future-proof your customer care from within** - reconsider the benefits of flexible working. Gone are the days when the very mention of the word instilled fear into the heart of senior executives. Over the years, organizations have come to recognize how flexible working increases employee satisfaction with a direct and favourable impact on customer service.

The latest findings of global public opinion and data company [YouGov](#) claim that the desire to work more flexibly in future was expressed by 70% of respondents, with 65% adding it would improve their wellbeing and satisfaction at work.

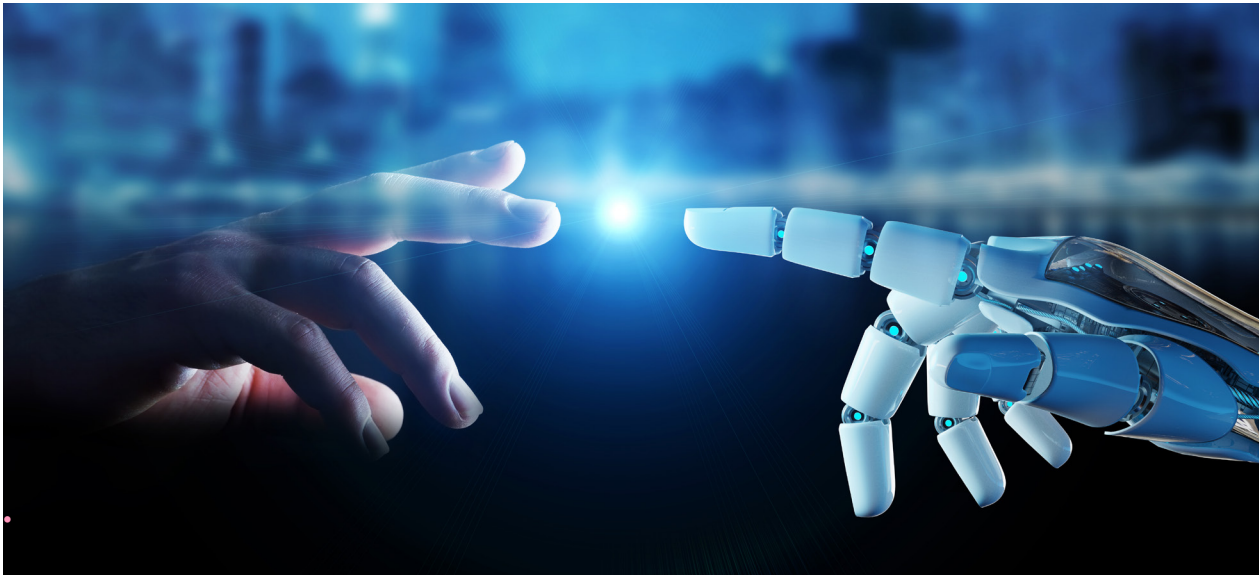
Flexible working comes in all shapes and sizes from traditional full-time and part-time contracts, job-shares, flexitime, regular working from home arrangements, mobile or teleworking to career breaks and Pay-as-you-go arrangements in the form of zero-hour contracts, compressed, annualized working hours and even Time Off Without Pay (TOWP). Why not test some or all of these options, using advanced WFM to balance and schedule different contract types to see whether it makes a difference to employee and customer satisfaction.

- **Empower employees with self-service for enhanced performance** - flexible working makes sound business and operational sense and is one way to empower employees. Another method is to enhance employee fulfilment through increased flexibility. Allowing people to take control of their work/life balance can reduce stress and absences. Liberate employees with a greater sense of independence, involvement and satisfaction by way of self-service options for preferred shifts, holiday requests and time off for medical appointments. At the same time employees can improve their personal performance by access

to their own Key Performance Indicators (KPIs) and team customer Service Level Agreements (SLAs).

To stay on top of this level of self-service management requires a centralized view of activity. This is where cloud-based workforce management solutions become an important tool when it comes to employee flexibility and enablement. WFM technology provides a way to store staff contracts, preferences and to monitor activity and compliance.

- **Maximize competence of your human capital** - a good customer service strategy starts with good people. While AI and chatbots are taking over many routine and self-service tasks, the role of human employees to handle situations of both logistical and emotional complexity remains crucial, in fact the demand on them increases as they are earmarked for these delicate situations. Look for candidates with high levels of emotional intelligence - whatever their role. These are the ones who instinctively understand how the customer - internal or external - is feeling and exploit their powers of conversation, empathy, creativity, intuition and negotiation to find the right solution for customers. Once you have found the right people, support them with regular training, targeted competence development and meaningful career paths.
- **Involve and devolve** - during times of organizational change, individuals and even whole departments tend to operate and take decisions in isolation. Lead from the front. Break down barriers and build trust through cross-functional get-togethers or introduce an online forum to exchange knowledge, best-practice and learning. Encourage managers to involve everyone in collective decision-making on processes and how best to contribute strategically to the new world order. Give them the authority to do their job and see customer service levels soar.



### Think about infusing AI into the employee experience



In 2018 and beyond, we expect continuing rapid adoption and maturation of AI, robotics and automation solutions. Leading organizations are working hard to put humans in the loop – re-thinking work architecture, retraining people and rearranging the organization to leverage technology to transform business. The broader aim is not to just eliminate routine tasks and cut costs, but to create value for customers and meaningful work for people.

[Deloitte Consulting](#)

The statement above reflects Teleopti's own belief in the importance of infusing AI into the customer and employee experience. A driver for digital transformation is typically corporate efficiency and agility combined with employee engagement. Consider using artificial intelligence to nurture loyal customers via improved CX from empowered employees.

### • AI for internal Chats and self-service

– Chatbots can be a CX enhancer and they are also a game changer for internal communication and employee morale. Cutback on time-consuming staff monitoring and instead use bots that learn from existing data to help people manage their work-life balance. These bots can hold conversational chats to quickly notify staff of potential time off or overtime and create an easy balance between optimized customer service operations and greater employee freedom. Increase channels via mobile apps which allow faster self-service requests for your teams, while improving direct communication between customer facing, supervisory and planning staff leading to increased employee engagement and loyalty.



Cultural and workforce optimization is critical if organizations wish to remain relevant to their customers in an ever-changing industry. Implementing industry best practice, such as improved operating models to drive productivity through proactive automation and advanced workflow, will assist in improving employee experience and workforce optimization.”

[Dimension Data](#)

### 3. Minimize organizational risk: resilience, security and compliance management

For many organizations, the ability to drive effective CX and employee engagement programs relies on a robust set of 'behind the scenes' processes that are designed to mitigate a diverse range of corporate risks. If these do not exist, or they fail, the very platform upon which all other initiatives are based are likely to slow down or even collapse altogether, shaking the very foundations of a successful business.

Therefore, the next set of questions becomes relevant. What steps should leaders take to strengthen their organization with robust security policies? What happens in an emergency? How can organizations ensure every department complies with important workplace legislation such as the EU Working Time Directive or local Union and Works Council laws? How do you avoid incurring financial penalties for non-compliance with General Data Protection Regulation (GDPR)? How can leaders proactively support future growth and expansion plans?

#### Recommendations for success

- Strengthen and secure your operations
- Guarantee effective contractual compliance in the workplace
- Avoid financial penalties
- Support growth and expansion
- Boost business continuity planning

While WFM technology is not a bespoke risk management tool, its automated, process-driven qualities and proven ability to manage large datastreams, fed by real-time workforce information, make it an effective way to manage a variety of risk factors. Use the latest WFM solutions to mitigate risk and drive sustainable business success in the following ways:

- **Look to the past for future planning** - many organizations want to be proactive and are keen to forecast staffing needs based on future





growth projects to stay ahead of the curve. WFM technology makes this possible by providing easy access to a wealth of historic data and advanced reporting functionality to speedily predict, create and search future requirements for headcount and specific skills. The data can also be used to liaise with other departments to ensure collaboration on projects and lead to better CX. Likewise the data can be used to right-size companies during periods of organizational change such as mergers and acquisitions to determine which areas need to grow or shrink.

- **Include WFM in business continuity planning** – exceptional bad weather and major IT systems outages can disrupt day-to-day business operations. WFM technology enables managers to conduct ‘what if’ scenarios for all possible eventualities, making WFM a strategic tool and intrinsic part of business continuity planning.
- **Stay ahead with resilience, security and compliance management** – all organizations are legally obliged to comply with their local employment laws and satisfy Union or Works Council demands for fairness. Customers and employees expect their brands to comply with the latest GDPR legislation and not share their personal details with third parties without their prior written consent. There should be no point of weakness regardless of whether it is customer or employee data. Use advanced WFM technology to protect employee and customer confidence while keeping the organization secure and compliant.

- **Enable your teams to keep employee data safe** – all internal systems need to be cyber secure and employee data is no different. For example in terms of CX, check that all frontline staff data held in your current or prospective WFM solution has protocols in place for higher security. This should include passwords and automation around data protection containing pseudonymization of data if an employee is leaving their position, so that data history is maintained without infringing any data protection regulations.

- **Adopt a single solution to channel data across the whole company** – empower your teams with access to real-time and historic data streams that support intelligent decision-making and enable remedial action to be taken. As employee data can no longer be left unchecked, in multiple, unprotected systems, choose a single solution that can harness all this employee information and has the right security processes in place. Keep one step ahead by choosing the right technology partner – who has Information Security protocols across the organization – and avoid heavy financial penalties that eat into budgets earmarked for revenue-making projects and diminish business success.

What is more, today’s WFM cloud providers continually invest in security, ensuring that their data centers are subject to the highest protection. Be sure to check they run their services on a platform that has received approval from EU data protection authorities, they have implemented internationally recognized information security controls and are certified to quality standards such as ISO-27001 to keep your data secure.

## Conclusion

We hope this white paper has inspired you to apply the mindset, principles and processes of workforce management to the CX of your organization. Use WFM technology to digitalize into the future by creating a more automated, intelligent and interconnected environment for operations that harnesses the power of data to gain a greater understanding of customers and employees. Through optimized automation organizations can yield tangible time and financial savings and be

truly technocratic by ensuring company compliance, fairness and transparency.

Along with many of the world's most famous brands are you ready to maximize Teleopti's expert knowledge and innovative WFM solutions? The goal is to achieve sustainable business success by powering CX and employee engagement with WFM at the core of your transformational strategy.



**Teleopti**, a top, global provider of workforce management software, offers a world-class WFM solution that is sophisticated, localized and easy to use. As the largest "best-of-breed" vendor, Teleopti focuses on helping contact centers, back offices and retail stores improve customer service, employee satisfaction and profitability – through optimized, automated forecasting and scheduling with cutting-edge features to empower and engage employees.

Founded in 1992, Swedish-established Teleopti has customers in 90 countries, numerous offices around the world – from Beijing to Denver – and a comprehensive global network of partners. With a record of continuous net profitability for 25 years and with high customer satisfaction ratings, Teleopti serves as a reliable partner. For more information, please visit [www.teleopti.com](http://www.teleopti.com)