

# Complex Times Call for Simple Measures

How smart bots, chat, and customizable workflows are key to delivering exceptional digital experiences without flaming out or going broke



# More people to address in more places

Around the world, organizations are adopting digital transformation initiatives and investing in new technologies at an accelerated rate. Enterprises in all industries are seeking what “digital-first” organizations already know: that digital tools create more growth opportunities, increase competitive advantage, help control costs, and improve operating efficiency.

For complex, customer-centric enterprises — those with multiple lines of business and/or a presence in multiple markets — digital transformation has to be about more than just backend efficiency. They also need to be able

to deliver superior digital customer experiences across all platforms because, when they do, they can potentially boost customer satisfaction rates by as much as 20-30% and boost revenues by as much as 50%. <sup>1</sup>

*Companies spent more than \$2 trillion on digital transformation in 2019. <sup>2</sup>*

If your organization is like many others, artificial intelligence (AI) powered tools like chatbots and automated customer service and engagement solutions may be a bigger move than you’re willing to make.

While these technologies are often touted as revolutionary for digital customer experiences, in many cases they’re more bark than bite and aren’t yet ready for primetime. Not only are these tools exorbitantly priced, they can also be overwhelming to deploy,

1 - Breuer, Ralph; Fanderl, Harald; Freundt, Tjark; Maechler, Nicolas; Moritz, Stefan; van der Marel, Fransje. “What matters in customer-experience transformations.” McKinsey. July 12, 2019.  
2 - Stackpole, Beth. “State of the CIO.” CIO/IDG. Winter 2018.

configure, and manage when you consider how many different audiences, segments, and use cases have to be addressed in a multifaceted organization.

Instead, when you have multiple business units, teams, and locations, you need:

- Strategic tools to scale real-time customer interactions across your organization
- A methodical approach to enhancing digital customer experiences
- Immediate ROI without huge expenses or lengthy deployment times

Increasingly, IT and enterprise business leaders are understanding that a phased approach to digital transformation — one that employs a combination of cost-effective smart bots, live chat, and custom automation deployed strategically at different times — can help you achieve your digital objectives and deliver better customer experiences.

# Rapid change drives the rush to transform

It's no secret that customer expectations change often and fast. Today, customers want 24/7 access to products, services, and information. They expect faster response times and self-service options, and they want more personalized experiences across channels.

Tomorrow will bring new expectations, furthering the need for greater flexibility, agility, and responsiveness of a digitally transformed organization. Direct customer conversations and elevated experiences are vital to competing in an evolving digital-first landscape because

getting them right can lead to many positive outcomes, including:

- Higher customer satisfaction scores
- Incremental growth among existing customers
- Increased online visibility, which can result in new referrals

But these outcomes are hard to achieve at scale with conventional tools and limited resources. Human agents simply don't have the bandwidth to talk to all your customers, and growing your customer service team or outsourcing may not make financial sense.

While throwing cutting-edge tools like AI-based systems seems like an ideal solution, it's often beyond the financial means of most teams and beyond their technical capabilities because of how unwieldy they can be to implement, configure, and manage — especially when they need to be deployed across multiple brands, teams, or locations.



*59% of customers say tailored engagement based on past interactions is very important to winning their business*



*70% of customers say seamless handoffs or contextualized engagement based on earlier interactions are very important to winning their business.*

Source: Salesforce.com "State of the Connected Customer" report

Undertaking a project to digitally transform the customer experience is increasingly necessary, but it doesn't come without risk.

# Why digital experience development fails

No matter how solid your intentions are for digitally transforming your enterprise, there are some common roadblocks that can get in the way of success.

Before you adopt new technologies, it's important to complete a comprehensive evaluation of their impact on your whole enterprise, as well as individual business units and teams. But it's extremely challenging to do this without a production-ready environment where an idea,

*Around 70% of companies fail to successfully complete large-scale transformation programs in part because they don't take an iterative approach and end up with digital fatigue.* <sup>3</sup>

3 - Breuer, Ralph; Fanderl, Harald; Freundt, Tjark; Maechler, Nicolas; Moritz, Stefan; van der Marel, Fransje. "What matters in customer-experience transformations." McKinsey. July 12, 2019.

trend, or technology can be tested with all stakeholders in the existing infrastructure to then determine a possible return on investment. <sup>4</sup>

The problem is, few organizations have this kind of environment available to them and fewer have the expertise and patience to do it right.

*“Rapid advances in artificial intelligence (AI), robotics and other emerging technologies are happening in ever shorter cycles, changing the very nature of the jobs that need to be done and the skills needed to do them.” <sup>5</sup>*

Generally speaking, ROI calculations are often ballpark figures, at best. When there aren't enough real-world users in your early-stage trial of the technology, it's

difficult to know the actual level of adoption you'll see in your organization — let alone how successful it will be — once the technology is deployed, which is a risky and potentially costly proposition.

Worse, your company may not have enough software engineers on hand with relevant experience in emerging technologies. A lack of available expertise can grind an already-faltering transformation project to a halt, especially if it's not feasible for you to acquire the right talent at the cost necessary.

4 - Saran, Cliff. “Companies lose out as digital transformation costs skyrocket.” ComputerWeekly.com. May 12, 2020.  
5 - Milano, Miguel. “The digital skills gap is widening. Here's how to bridge it.” World Economic Forum. March 12, 2019.

# Take a phased, methodical approach instead

A better approach is to start by understanding the ways in which your business needs to change to deliver improved experiences both to customers and employees. Taking it one problem or challenge at a time helps you avoid overloading your internal teams with a slew of high-powered tools that are too disruptive and take an agonizingly long time to deploy, or creating unintended consequences that negatively impact your customers.

Once you have a good grasp of the customer service gaps to fill and the processes to build or support, then you can focus on implementing the right technologies that will deliver value early on, one step at a time.

## *What Needs to Change in Your Business? Ask Yourself These 5 Questions: <sup>6</sup>*



*• How well does your business perform for customers?*



*• How responsive is your business to customer needs?*



*• How authentic are your customer interactions?*



*• How consistent is your message to customers?*



*• How does your business measure up with your competitors?*

6 - Ayyaswamy, Regu; Chatterjee, Suranjan; Kholkar, Dinanath; Krishnan, P.R.; Ramanujam, Krishnan. "Digital Transformation Should Start with the Customer Experience." Tata Consultancy Services. 2018.

# Digitally transform the smart way and make it stick

For customer-centric enterprises, laying the groundwork for and accelerating digital transformation truly begins with enhancing and elevating the customer experience — and doesn't have to consume your entire budget.

Creating new digital customer experiences that will help your organization evolve can be thoroughly accomplished with a combination of smart chatbots, live chat, and custom automation. In the current landscape, most organizations are aware of the value a live chat

platform brings to the business. In fact, more than two-thirds of consumer-based businesses use live chat for customer support<sup>7</sup> and nearly 80% use it for sales conversations.

Live chat is the simplest — and most preferred by consumers — method for direct, personalized interactions without having to navigate a complex phone tree or have a voice conversation. Platforms are far less costly and much easier to implement, configure, and deploy than more complex AI-inspired tools.

In addition to providing a convenient, accessible channel for direct personalized engagement, live chat platforms can be paired with custom automation to instantly route conversations to the right team or agent for an immediate response and be deeply analyzed for patterns, trends, or other clues that can help an organization methodically and strategically improve its front-line customer engagement experiences.

7 - "How to pick the best live chat software-2018." Zoho.com. 2018.



Meanwhile, smart bots are customizable chatbots that are typically deployed to solve specific problems or achieve particular outcomes. They can be contrasted with AI bots that may attempt to solve virtually any problem a customer surfaces.

In particular, smart bots can be configured for a range of uses, such as answering commonly asked questions, automatically sending visitors who are ready to buy directly to a sales agent on a specific team or department via the live chat platform, and posing more probing questions to prospects who need more information and directing them to certain pages in the site. Smart bots can also gather routine information before a chat with a human. And all of it's done with little or no human intervention.

Chatbot tools are easily configurable and can integrate with your existing live chat platforms for an efficient,

personalized, hybrid human-bot solution that can be deployed across all customer touch points, brands, locations, and channels, including:

- eCommerce platforms and shopping carts
- Customer support and help desks
- On-site web navigation support
- Sales outreach and follow-up

# Smart tools help refine your customer engagement strategy

With these tools in place, you can use them in a number of ways to refine your customer engagement strategy, both in the short term and long term. For example:

## Enhance sales & marketing

Sales and marketing teams are continually looking for ways to gain insight into customers and prospects and collect data to use in targeted campaigns. Using chat

tools on your website can enhance these efforts and ensure the kind of personalization that's crucial for today's customers. Chat tools increase web engagement and help uncover the pain points and unmet needs customers and prospects have when they visit your site. Chat tools can also help you:

- Educate prospects earlier on in the buying cycle
- Capture and qualify high-intent traffic
- Aggregate and analyze customer interaction data to inform future technology investments and strategies

*55% of marketers are prioritizing more effective audience segmentation and targeting.*<sup>8</sup>

8 - 2019 Digital Trends.  
Adobe.

### **In-depth, detailed down-stream analysis**

Data drives virtually every business decision and the data from smart bots and live chat interactions can be a treasure trove of relevant and high-value information. Use custom automation workflows to automatically flag or label chats — based on channel, product/solution category, or use case — for further downstream analysis that can reveal previously hidden actionable insights to continually refine and improve your customers' experience.

### **Streamline tasks and improve productivity**

Every customer engagement strategy involves some kind of repetitive action that takes more time than you'd prefer. But human sales agents can only handle so many tasks simultaneously, which hinders productivity and profitability.

Smart bots and custom automation solutions can unburden your customer-facing engagement teams of the most repetitive, time-consuming actions that bog

them down, and are easily scalable across your entire organization.

### **Enable a phased approach to digital transformation**

Digital transformation is essential to meet changing business and market requirements and stay competitive. But it doesn't happen overnight. Utilizing smart chatbots, live chat, and custom automation allows you to create new or modify existing business processes, culture, and customer experiences as you need them, responding to the most pressing use cases "on demand" instead of all at once. A phased approach allows you to:

- Solve many problems with relatively simple, rule-based automations and purpose-built bots
- Test as you go by evaluating each step or use case to ensure it's providing a great experience, then replicating across other business units, functions, and teams as needed



*90% of businesses experience compliant resolution with bots <sup>9</sup>*

9 - "Humans + bots: Tension and opportunity." MIT Technology Review Insights. Nov. 14, 2018.

- Implement and maintain digital customer experiences with little to no advanced technical skills

*60% of companies that have undergone a digital transformation have created new business models<sup>10</sup>*

# Compete in the digital age with integrated engagement solutions

In today's rapidly evolving landscape, your enterprise is under immense pressure to deliver seamless, engaging customer experiences across units, teams, and locations. But though many organizations around you may be adding AI and cloud services to streamline and improve processes and help them become more

10 - Digital Transformation Survey. Corporate Leaders / PTC. May 2018.

competitive, you may find that a massive investment of time and resources into expensive AI-powered chatbots is beyond your means and comfort zone.

Instead, to compete in the Digital Age, you can take a more cautious, measured, and strategic approach to your operations. By employing cost-effective smart bots and configurable automation workflows that integrate with the live chat tools you already have, you can create and deliver digital customer experiences that meet and exceed expectations.

You'll be able to aggregate customer and business intelligence across your entire enterprise to help you make smarter, more informed strategic decisions around technology investments, service and product positioning, while optimizing sales, marketing, and customer support activities — without the expense, hassle, or headaches of going all-in on technologies that may not deliver results for years down the road.

*To learn more about using integrated chat tools and custom automation for your complex enterprise, [click here](#) to schedule your free, personalized demo of the SnapEngage platform.*

