Personalized Customer Experience: 10 Tips for Positive Memorable Call Center Experience

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Today's connected customers expect a personalized experience when using a call center to resolve their contact reason on the first contact. Furthermore, SQM Group's research shows that

> A call center agent trying to provide a personalized experience is meaningless without knowing the customer."
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> *Mike Desmarais*

"76% of customers expect their call center experiences to be personalized. In addition, customers who had a personalized experience using a call center are more likely to make more purchases than those who did not have a personalized experience".

This blog will discuss what is a personalized customer experience and its benefits and explore 10 personalization tips to help resolve call reason on the first contact and provide positive memorable customer experiences (CX).

What is a Personalized Customer Experience?

Personalized customer experience refers to understanding an individual's situation to be able to provide specifically tailored solutions to meet a customer's unique and individual requirements. Furthermore, personalization treats customers as individuals who have unique needs rather than generic customer needs.

For personalized experience to be successful, it needs to take place for all the customer journey lifecycle stages (e.g., brand awareness, purchasing, onboarding, servicing, and renewing). For example, personalization works effectively when customer information is leveraged for any journey stage to make the experience unique to each individual for providing recommendations or tailored solutions for resolving their call reason.

What are the Benefits of Personalized Customer Experience?

Customers remember positive memorable experiences with a company and want to continue to do business with brands that treat them as individuals for all the customer journey lifecycle stages. Below are the benefits of a personalized CX and why companies and call centers need to treat customers as individuals who have unique requirements that they need to provide

recommendations and tailored solutions to address their needs.

Reduce Operating Costs – For example, properly trained and coached agents understand an individual's situation to be able to provide specifically tailored solutions to meet a customer's unique and individual requirements. As a result, these agents are able to achieve FCR consistently. For every 1% improvement in FCR, operating costs are reduced by 1%.

Improve Customer Satisfaction Score – One of the biggest benefits of personalized CX is that it increases Csat and loyalty. For example, concierge service makes the customer feel like the call center agent has gone the extra mile to resolve their call reason on the first call. When an agent provides concierge service, it delivers higher FCR and Csat performance because the customer does not have to call or contact third parties such as a doctor's office, head office, bank, or retail store. For every 1% improvement in FCR, there is a 1% improvement in Csat.

Increase Opportunities to Sell – For example, when agents take the time to understand the customer's situation, treat them as an individual versus a typical customer interaction, and provide personalized solutions, they will be very satisfied with their call center experience. When a customer is very satisfied, the cross-selling acceptance rate increases by 20% due to the agent earning the right sell.

Improve Net Promoter Score – For example, when call center agents provide personalized customer experience (e.g., unique and tailored solutions), it can have a significant positive impact on NPS. For every 1% improvement in Csat, the transactional NPS increases by 1.4.

10 Personalization Tips for a Positive Memorable CX

It is important to emphasize that in many cases, the call center is the customer touchpoint of choice, especially for complex issues, so when they deliver personalization for providing a positive rememberable CX, it helps to enable companies to differentiate themselves from their competition. Below are 10 personalization tips to help deliver higher FCR and provide positive memorable CX.

1. Understand Customer Situations and Expectations

A personalized customer experience cannot be delivered without understanding their current situation and what their expectations are. Understanding will help identify what they are thinking and is an essential step in providing a personalized CX.

On an ongoing basis, review the CX and their expectations by using data from the below feedback sources to ensure the right personalized experience is being offered. Here are some tips to understand CX and [customer expectations](#) to help gain insights into what should be offered for a personalized experience:

- Conduct post-call surveys and opinion polls regularly
- Analyze CX by segmenting the data to thoroughly understand CX
- Use AI to analyze CX to assess sentiment and service recovery opportunities
- Seek agent feedback about CX and recommendations to personalize the experience
- Review touchpoints (e.g., call center, website, chat, email, and IVR) usage history

2. Capture and Leverage CX Data

Providing a personalized experience needs to have relevant data that provides insights into the information one needs to know about a customer, such as touchpoints usage, products or services buying behavior, Csat, customer expectations, and much more. Collecting information about customer touchpoints and buying behaviors takes the guesswork out of offering the right personalized solutions.

For many companies, the biggest obstacle to creating personalized experiences is due to not capturing and knowing what is the right CX data required. Furthermore, it can be challenging if there are technological limitations and not having analysts who know how to leverage the CX data. However, the good thing is that most companies and call centers have a tremendous amount of CX data that can be leveraged to deliver personalized experiences for all touchpoints.

3. Map Out the Customer Journey

The essence of customer experience journey mapping is to walk in the customer's shoes as they interact with a company using different touchpoints. As such, CX journey mapping focuses on the entire end-to-end journey for using a company's products and/or services from the customer's perspective. Therefore, using CX journey mapping is an effective technique for improving customer experience using a touchpoint or multiple touchpoints to resolve the same inquiry or problem and for developing personalized solutions.

The customer journey map can help identify customer experiences and expectations for each touchpoint. By mapping out the customer journey, the most effective personalized experiences for each touchpoint can be developed that customers utilize. For example, if a customer is at the onboarding stage, sharing content that helps them understand how to use the services better and is specific to their situation, and is tailored to their requirements.

4. Use AI to Deliver on a Large-Scale Personalization

Artificial intelligence (AI) makes it possible to deliver personalized experiences on a large scale. AI can capture real-time insights that can be used for delivering automated personalized experiences. For example, the development of AI chatbots. These chatbots use real-time CX data and are able to come up with tailored solutions to help a customer resolve their issues or problems.

Another example of AI that can be used on a large scale is sentiment analysis which comes from customer feedback based on interactions they had using a company's touchpoints. The sentiment analysis CX data can be used in real-time to help agents or self-service touchpoints provide personalized recommendations or solutions on the fly. For example, if a customer had a poor experience using a touchpoint, provide them with a personalized offer the next time they call to recover from the bad experience they had.

5. Empower Agents by Leveraging CRM

Most companies and call centers use customer relationship management (CRM) software to capture and leverage CX data as one of their primary tools for delivering a personalized experience. The key is for agents to be able to review a customer's situation (e.g., past calls, service, or order status and expectations) in the CRM system quickly so an agent can offer personalized solutions in real-time.

Furthermore, CRM systems can help provide personalized offerings in several significant ways. For example, CRM systems provide a suite of interactive voice response options, CX data such as account information, call, buying history, and personalized recommendations based on their situation. CRM system is the main tool for empowering agents to offer personalization.

6. Train Agents on Customer Empathy and Rapport

Training agents on customer empathy and rapport are essential for creating personalized experiences. No customers want to feel processed or not valued for their business. How an agent responds to a customer who had a poor experience is crucial. In many cases, the poor experiences are compounded by an agent who does not know how to show empathy or acts like a robot.

Any call center committed to offering personalization should ensure that its agents are outstanding at customer empathy. To ensure agents deliver customer empathy consistently, they need to be trained, coached, and monitored through their quality assurance program and post-call surveys. It is important to emphasize that customer empathy is not limited to an agent handling a call where the customer is upset or dissatisfied but also applies to all moments of truth customers experience interacting with a call center.

Customer rapport is about establishing and maintaining a positive customer journey to help resolve inquiries or problems. Furthermore, many customers who experienced a personalized solution to resolve their call reason feel they had a good rapport with the agent due to the personalized experience they had resolving the call reason.

7. Delivering Personalization Through Concierge Service

The practice of concierge service is moving from the hotel industry to the call center industry. How concierge service works in a call center environment is an agent assists a customer who needs to call or contact another department or organization for a reference code, more information, or authorization to help resolve the customer's call. One can strongly argue that concierge service personifies the personalization intent by offering a customer a personal approach to resolving their inquiry or problem.

Specifically, for call center concierge service, an agent tells the customer they will call the department or organization on their behalf or with them on the line to get the required reference code, information, or authorization. In most cases, when using concierge service, an agent calls another department or organization while the customer is on the phone, and a three-way conversation occurs to come up with tailored solutions for resolving their inquiry or problem.

8. Use Persona Communication Styles to Deliver Personalization

Identifying customer and agent communication styles and applying adaptability style strategies helps agents determine the best way to successfully interact with all customer persona communication styles and deliver personalization. Agents need to be trained on how to adapt to different persona communication styles, such as:

The Analyzer: The analyzer persona likes accuracy and uses data when interacting with an agent.
The Driver: Drivers are less expressive but will tell an agent the desired solution. The driver persona wants results and is aggressive.
The Supporter: Supporters are highly expressive but ask for a solution. The supporter persona likes to be friendly, collaborative, and agreeable.
The Influencer: Influencers are also highly expressive but will tell an agent the desired solution. The influencer persona is persuasive and innovative.

Most agents cannot identify the different persona styles of the customers or are not trained to be adaptive to match their communication style to the Persona Communication Styles of the customers calling them. Agents adapting their communication style to match the customer's style lets them personalize their call handling to engage the customer appropriately. For example, if a customer has a supporter communication style, an agent focuses on what matters to the customer and avoids being too process-orientated.

9. Create a Seamless Omni-Channel Experience

Offering personalization to customers is saying farewell to the practice of a one-size-fits-all customer service approach which includes the way customers use touchpoints to resolve an inquiry or problem. Customers should be able to use any touchpoint ((e.g., call center, chat, email, IVR, and website) they want to use. Do not force a customer into a touchpoint.

Furthermore, customers should be able to start an interaction at one touchpoint and continue on to another touchpoint without having to start over.

Omni-channel is defined as a customer who has a seamless experience across all touchpoints to resolve the same inquiry or problem. Put differently, when a customer used another touchpoint to resolve the same inquiry or problem, they were able to pick up from where they left off in the previous touchpoint and, as a result, did not have to start from the beginning.

An omni-channel experience is a great example of personalization due to the automation of transferring CX data from the different touchpoints to provide a seamless experience to resolve the same call reason using multiple touchpoints.

10. Assign Dedicated Agents to Specific Customer Types

Some companies have successfully assigned dedicated agents to specific customer types in B2B or B2C call centers to offer a personalized experience. Using dedicated agents for specific customer types is a relationship approach for handling inquiries and problems.

Using dedicated agents for specific customer types (e.g., new, high-value, complex, escalation, helpdesk, and unresolved calls) can help deliver great CX. The dedicated agent approach is more commonly used in B2B than in B2C call centers. As previously mentioned, the dedicated agent is a relationship approach in which some describe the agent as an account rep.

When a customer calls the call center using dedicated agents, they talk to the same agent every time. The value of this type of operating practice is that agents take more ownership in resolving customer issues and problems because they have an ongoing relationship with those customers.

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