

Optimizing the CX Technology Ecosystem

4 Often Overlooked Areas of Innovation

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How Can Your Organization Identify Innovative Uses of Your Own Technology Ecosystem?

Optimizing the CX Technology Ecosystem

Four Often Overlooked Areas of Innovation that Benefit Customers and Employees

Today's businesses leverage a wide range of technology platforms, hardware and applications to meet the evolving expectations of their customers. The investment into these technologies is often significant, as is their potential impact on an organization's relationships with its customers.

Unfortunately, many organizations often overlook relatively simple ways to improve the effectiveness of these technologies and their impact on customer and employee satisfaction.

In this eBook, we'll explore a number of innovation opportunities across a range of CX technologies and platforms, including contact center, customer relationship management, business productivity and application development. We'll also apply those innovations to specific use cases to get an idea of their potential impact on various industries, including some of the most complex and compliance driven industries – healthcare, financial



services and public sector. Finally, we'll offer insight into the steps your organization can take to identify potential areas of innovation within your unique CX technology ecosystem.

Identifying the Top Four Overlooked Innovation Opportunities

In order to understand your organization's unique opportunities for innovating its use of CX technologies, we must first understand what innovation truly is.

Definition of

INNOVATION

1 : the introduction of something new

2 : a new idea, method, or device : novelty

Merriam-Webster Dictionary

For our purposes, we'll focus on innovations that improve or streamline the use of technology your organization already has in place. It is important to remember that an innovation of your current technologies doesn't have to be large in scope, cost thousands of dollars or even require a significant amount of effort. The most important aspect of any innovation is its end goal – improving interactions and satisfaction for your customers and employees.

Let's take a look at the top four areas of innovation most often overlooked by modern organizations, in no particular order.

Cross-Platform Integration

The feature sets and functionality offered by modern software applications are unparalleled. Take contact center technologies, for instance. Today's contact center applications can track inbound interactions, intelligently route customers to qualified agents, interpret a caller's tone of voice and track a multitude of data points. This is just one example of the increasing power of customer experience technology – never before have such rapid advancements in CX-supporting technologies been achieved.

Unfortunately, despite the power offered by today's technology solutions, each is largely focused on supporting specific logistical aspects of interactions. Contact center solutions may connect customers to agents, but do little to connect agents with the data they need to offer the personalized assistance customers have come to expect. For that, agents are forced to navigate to their organization's CRM platform. In some cases, to truly understand who the customer is, agents must access multiple applications, all while trying to offer the customer an engaging interaction in real-time.

It doesn't have to be this way. Creating an integration between your contact center platform and CRM is a great way to arm agents with the information they need to serve customers.

While it may sound complicated, cross-platform integration is easier than you think. In fact, a number of middleware applications are available today that provide seamless integration between popular contact center platforms like PureConnect from Genesys, and leading CRM solutions like Microsoft Dynamics. If a middleware application cannot be found for a specific use case, custom integrations can be developed by software architects and engineers.

While there is certainly a cost to either a middleware application or custom integration solution, an effective cross-platform integration offers many benefits, including:

- **Streamlined access to information:**

Agent access to organization policies information and customer data is crucial during and after interactions. The more readily available this information is, the better the agent can tailor the interaction to their personality and specific needs. Integrating platforms to provide a holistic view of the customer's history with the organization from a single pane of glass improves efficiency and satisfaction for customers and employees alike.

- **Better interactions:**

Forcing customers to wait while agents switch between applications to obtain information negatively impacts the customer's experience. Integrating systems into a single access point reduces the time customers are forced to wait, improves the flow of conversation and arms agents with the data they need to more swiftly resolve the customer's needs.

- **Improved data:**

The easier it is for an agent to input customer information or provide feedback on company policies, the better and more valuable the data becomes. Integrating key data-tracking systems, like CRM or company portals, with commonly used applications like the contact center or even the enterprise email system, makes it easier for employees to input that valuable information.

Integrations are possible in a number of situations, across a wide range of platforms. Let's explore a few integration possibilities.

Supporting Patients using Contact Center and Medical Records System Integration

Amy recently visited her doctor for treatment of a knee injury. Following her appointment, she realized that she had some questions regarding the treatment plan. Amy calls the doctor's office for help.

Within the doctor's office, the phone is answered by Jane, the doctor's medical assistant. An integration between the office's contact center software and its medical records system gives Jane a detailed history of Amy's injury, her recent appointments and the treatment the doctor prescribed for her.

This information allows Jane to answer Amy's questions without having to access multiple applications. In turn, Amy receives the detailed and efficient guidance needed to speed her recovery.

Attracting New Banking Clients through Marketing Automation Platform and CRM Integration

David works in the marketing department for a large bank. His job responsibilities include engaging with current and prospective clients in an effort to inform them of the bank's product and service offerings. David leverages a marketing automation platform to create, distribute and track the effectiveness of emails to his target audience.

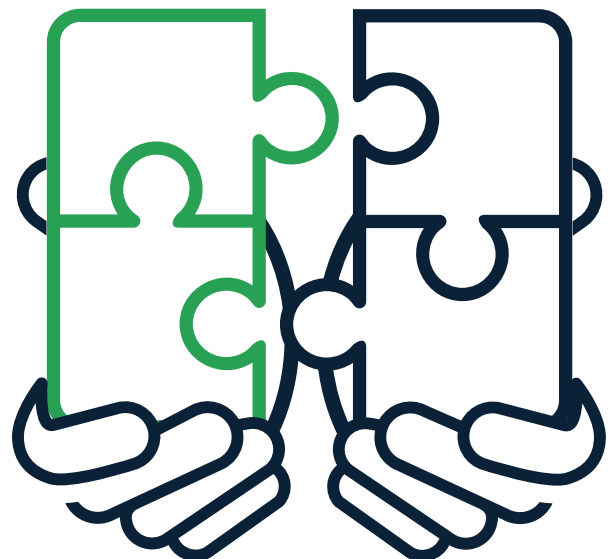
In order to personalize his outreach efforts to a specific audience, David relies on an integration between the marketing automation platform and the bank's CRM system. This integration allows David to import focused marketing lists based on a customer or prospect's demographic information, areas of interest and qualifications for financial products.

Assisting a Citizen using CRM and Employee Portal Integration

Colin wants to install a new shed on his property. Before beginning the project, he calls the city for information on the permits he may need and any restrictions regarding the placement of the shed in question. His call is answered by Samantha, the city's controller.

After learning about Colin's project, Samantha turns to the city's CRM system to get more information about his unique situation. By accessing the city's CRM platform, Samantha is able to see Colin's address, his property's zoning regulations and a history of the permits he's pulled in the past. An integration between the CRM system and the city's internal information portal hosted on Microsoft SharePoint helps Samantha cross reference Colin's address with permit requirements and shed placement restrictions. All of this information is presented to Samantha in a single application window. In seconds, she is able to gather the information needed to help Colin understand the steps he needs to take in order to install his shed.

Even though she is not directly employed within the Building Inspection department, the city's technology ecosystem helped Samantha address Colin's issue on first contact, without the need to transfer him to another party within the administration.



Utilization

Our next area of innovation has more to do with how people use a piece of technology than the features or capabilities of the technology itself. The flexibility of many of today's applications and technology platforms make them viable solutions for a wide range of challenges.

Unfortunately, when organizations purchase a piece of technology for a specific purpose, that technology is often solely used for that purpose. When this happens, features and functionality that may benefit other areas of the organization are left overlooked and unutilized.

Exploring innovative uses of your current technology is easy and costs next to nothing. Conduct an inventory of the technology you use today, including the features and functionality each platform offers. With this information in hand, consider the issues your organization, employees and customers face on an ongoing basis. Brainstorm ways to leverage the features and functionality of your current technology to overcome these issues. You may be surprised at what can be done with the technology you already rely on today.

Thinking of new and innovative ways to use the technology you already have offers many benefits, including:

- **Improved ROI:**

Demonstrating effective ROI of a technology solution is crucial to its ongoing financial support. Adding new and beneficial uses of your current technology instantly improves the return on the investment into that technology, thereby improving its chances of receiving ongoing budgetary allocations. Put simply, the more an application or platform is used and the more the organization receives for its money, the more likely it is to remain part of your technology ecosystem.

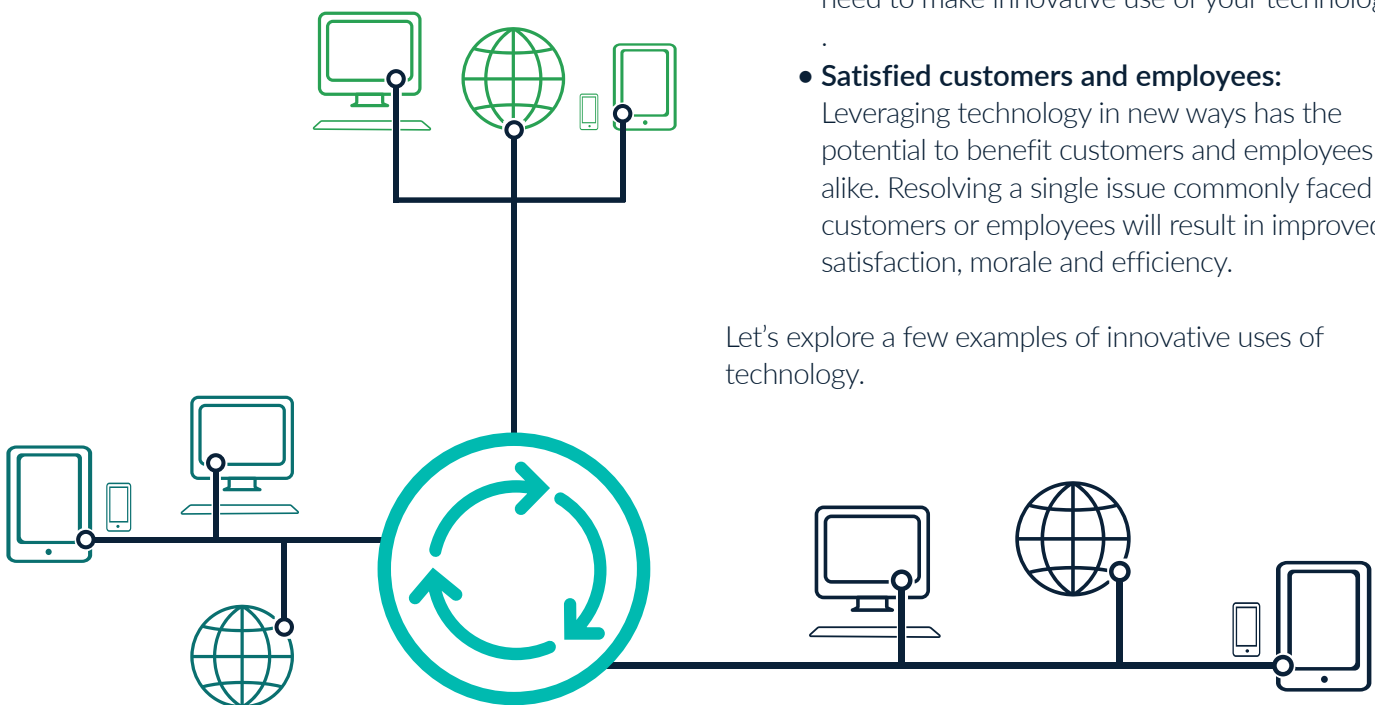
- **Minimal effort and cost:**

Finding new ways to leverage your existing technologies often requires a minimal amount of effort and investment, if any. A simple brainstorming session involving employees across various departments may yield the insight you need to make innovative use of your technology.

- **Satisfied customers and employees:**

Leveraging technology in new ways has the potential to benefit customers and employees alike. Resolving a single issue commonly faced by customers or employees will result in improved satisfaction, morale and efficiency.

Let's explore a few examples of innovative uses of technology.





Leveraging CRM to Keep Pace with Changing Legislation

Creating and changing laws, even minor ones at the municipal level, requires a great deal of documentation, reporting and communication. Realizing this, the mayor of Madison uses the town's Microsoft Dynamics platform to track and view the many details related to proposed legislation changes.

His approach provides for a comprehensive overview of past and current legislation initiatives, and allows total transparency between the government and the public – with just a few clicks, the mayor can view all documents and interactions associated with the change and provide historical reports on current and past legislation issues.

Using Skype for Patient Translation Services

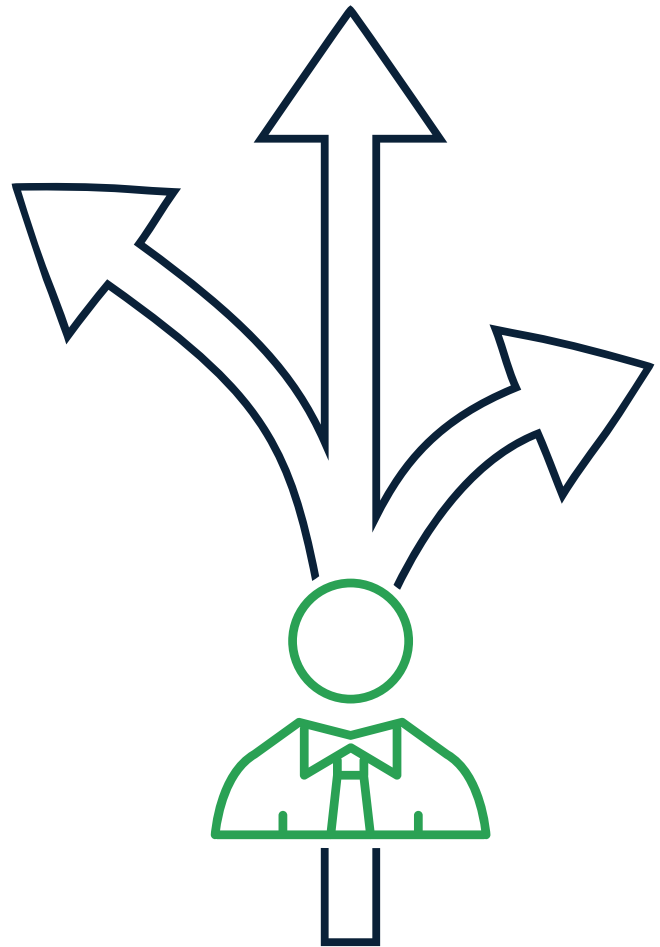
Dr. Smith's medical practice offers care to patients from a wide range of cultural backgrounds. Many of her patients are not native English speakers, which makes the delivery of treatment difficult. To overcome the language barrier, Dr. Smith and her team use Skype video conferencing to connect patients with translators, including staff members, family members and professional linguists.

The innovative use of Skype helps put patients at ease, improves the effectiveness of medical treatment and ensures the accuracy of post-appointment care.

Supporting New Financial Product Development Across Departments with Microsoft Office

City Federal Credit Union is committed to continually developing new products to meet the changing needs of its customers. Unfortunately, understanding what those needs may be is difficult due to the geographic separations between the credit union's branch locations. To facilitate the creation of new products, the credit union leverages the Microsoft Office suite.

From Power Point presentations on proposed products to brainstorming via Skype Video Conferencing, the Microsoft Office suite allows City Federal to keep all employees involved in the product ideation and creation process. The input of all branch locations helps the credit union's product and services menu evolve with changing customer needs.



Collaboration

Customer experience technologies are designed to support interactions between people. Far too often, however, businesses leverage their CX ecosystem to support interactions between customers and employees, and lose sight of the potential for internal interactions between employees and departments.

Many of the top CX technology applications offer features and functionality that allow staff members to communicate and collaborate on projects, customer issues and more.

Let's explore a few examples of using CX technologies to facilitate employee collaboration.

Using Skype and Contact Center to Streamline Patient Care

Dr. Hanson's dental office fields a number of patient inquiries each day. Many of these inquiries relate to past treatments and upcoming appointments. To help field these inquiries, Dr. Hanson offers his staff members access to Microsoft Skype. Using the collaboration tool, administrative staff can contact the office's dentists, dental assistants and scheduling staff for information within seconds.

The swift access to dental experts helps the office's administrative staff provide the quality care patients deserve.

SharePoint as an Internal Social Sharing Tool for Banking Agents

Country Bank is committed to providing its bank tellers, officers and staff the information they need to help customers conduct their financial business. To do so, the bank uses SharePoint to create an internal social sharing tool. The platform allows employees to access product descriptions and brochures, share ideas on customer



service and products, and offer suggestions on ways to sell services to customers.

The end result is a social media tool that helps employees share their experiences and access critical information, regardless of their geographic locations.

Leveraging Microsoft Teams to Respond to Citizen Requests

One of the major challenges of managing the flow of citizen requests through local administrative offices is the often-departmentalized nature of government entities. When a request comes into the general help inbox, but requires the attention of the building inspector or city planner, that correspondence may be lost in the shuffle across digital desks. This may result in poor citizen satisfaction, compliance issues and missed opportunities for grants and federal funding.

To resolve this issue, the administration of Boulder Creek leverages Microsoft Teams. The collaboration tool allows staff members to track the flow of a thread through various departments, and facilitates the real-time sharing of information. With Microsoft Teams in place, an administrative staffer at the town hall can route a permit request to the proper department, ask specific questions, track the response, and archive the interaction for the future reporting or record-keeping purposes.

Custom Technology Creation

Technology isn't always a one-size-fits-all solution – some IT challenges just can't be solved with an out-of-the-box solution. When your organization encounters a challenge that can't be resolved with a standard technology application, you don't have to simply live with the issue moving forward. Instead, take matters into your own hands, and develop your own solution. Internal application development is an innovative way to resolve your technology concerns in the best way for your organization, your customers and your employees.

While it may sound like an expensive and complicated matter to develop an application or piece of technology, creating new solutions from scratch is becoming easier every day. New standardized coding and development strategies, combined with much more widespread development skills and experience, makes custom development a viable solution for many organizations facing unique business challenges.

In fact, many organizations may find it easier and more affordable to develop a solution in-house, rather than purchasing an off-the-shelf application and customizing it to their unique needs. Businesses with robust IT teams may wish to tackle a development project in-house. Retaining a local development firm is another great way to create innovation through custom technology creation.



Whether you choose to tackle the project in-house or hire a development firm, custom technology creation offers a wide range of benefits, including:

- Customization, customization, customization:**
 Your organization's technology challenges are unique to you – no other business will face the exact same set of hurdles. Effectively resolving such unique and specific challenges with a standard solution may be difficult or impossible. Creating a customized solution that solves each and every aspect of your challenge is the only way to overcome it.
- Accessible support:**
 Developing a custom application internally or with the assistance of a local development firm offers the benefit of easy access to support – after all, the very people who created the technology are just an email or phone call away. This swift access to knowledgeable support makes resolving issues much easier, and streamlines the process of developing and implementing future iterations of the technology.
- Marketable IP:**
 Many of the world's most popular applications began life as an internal development project designed to address a specific issue. Internally developed technology innovations may have applications outside of your organization, making them a potential income generator.

Let's explore a few examples of innovative custom technology creation.

Connecting Care Givers to Real-Time Patient History Information

Electronic Medical Records systems, or EMRs, play a key role in the delivery of patient care. Unfortunately, writing and reading to these systems is often a complicated and slow process. This makes it difficult for nurses, physicians and medical assistants to record and access patient data quickly enough to deliver the best possible care.

Tired of the cumbersome nature of these systems, Dr. Smith retained a local application development firm to create a middleware application that reads and writes data from EMR systems through Microsoft Dynamics. The application streamlines access to patient medical histories and treatment information, without putting their personal data at risk.

By creating this middleware application, DR. Smith has increased the efficiency, accuracy and quality of care his office is able to provide each and every patient.

Providing Rural-Based Financial Advisors Mobile Access to Customer Data

FuturePlan Investments helps farmers and agriculturalists plan for life after retirement. Financial advisors at FuturePlan spend a significant amount of time traveling to customer farmsteads and agricultural operations to offer in-person retirement planning advice. The on-the-go nature of their work makes it difficult to keep up with changes to customer accounts and updated interactions from prospects.

To help its staff, FuturePlan created an innovative application that gives financial advisors access to Microsoft Dynamics from smart phones and smart watches. Customizable notifications allow financial advisors to remain current with the customer and prospect-related events that matter to their work, wherever their day may take them.

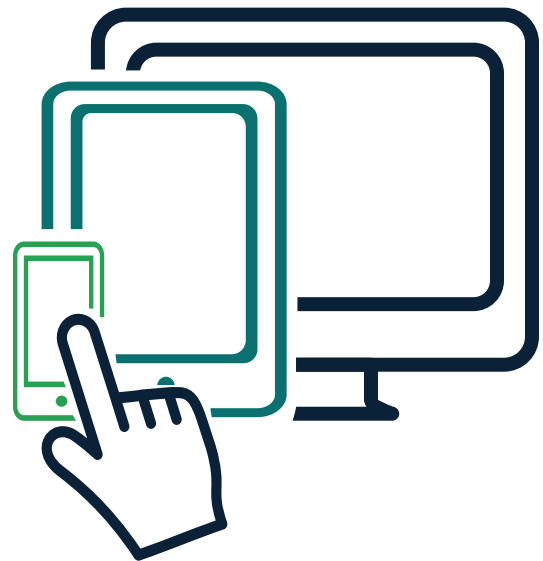
The virtual access to this information helps the firm's advisors maintain the up-to-date knowledge of customers and prospects needed to provide the personalized interactions they deserve

Managing Public Parks Via a Custom Mobile App

The village of East Lake maintains a number of beautiful public parks, each with its own amenities, including picnic areas, playgrounds and even wedding reception venues. During the fair-weather months, demand for these spaces is high – managing the incoming requests to reserve spaces or for maintenance became too much for the parks and rec department to handle.

East Lake partnered with a locally based technology development company to solve the issue. Their mission: to create a mobile application that better connects residents with the park and rec department. The end result offers residents the ability to reserve public spaces, check park schedules, request maintenance and ask questions, all from a smart phone, computer or tablet.

The application saves the village of East Lake significant money, improves the relationship between the parks and rec department and the public, and helps everyone enjoy the beautiful spaces the area has to offer.



How Can Your Organization Identify Innovative Uses of Your Own Technology Ecosystem?

Opportunities for technology innovation abound – you just have to identify them.

There are many viable strategies for identifying areas of CX technology innovation within your organization, including:

- **Developing committees:**

No one knows your technology like the people who use it on a daily basis. Consider the creation of an innovation committee made up of employees from different departments, with different responsibilities. By sharing their experiences and challenges with other staff members, the committee may find areas of innovation.

- **Rewards programs:**

Many organizations offer rewards, such as an additional vacation day or prize package, to employees who suggest improvements or innovations. Create a rewards program, with a simple method of submitting suggestions and a team of reviewers. You may be surprised at the number of innovations and suggestions you will receive.

- **Hiring a consultant:**

An external review of your technology ecosystem may be helpful in identifying opportunities for innovation. Consider retaining the services of a technology consulting firm for an outside perspective on your current technology use.

- **Leveraging your network:**

Many organizations that use their technology platforms in innovative and interesting ways are happy to share their experiences and the results of their efforts. Keep your eyes and ears open for stories of innovation online, at trade shows or even in discussions with peers in your industry. Who knows where the inspiration for innovation may come from?

Whatever strategy you choose, be proactive in searching for innovation opportunities, keep an open mind and remember that even a small area of innovation can net big results.



Strategy- Avtex offers comprehensive CX consulting services, including customer journey mapping, technology review and process planning to help you create a strategy for successful interactions.

Implementation- From planning to cross-platform integrations, Avtex guides your business through the implementation process to optimize your CX ecosystem for today and into the future.

Innovation- Through creative utilization of your current technology, exploration of new platforms or development of a custom application, Avtex helps you keep pace with ever-evolving customer expectations.

Management- Avtex offers full-service application, license, hosting and platform management services to keep your ecosystem performing at optimal levels.

About

Avtex is a full-service Customer Experience consultancy focused on helping organizations build trust with their customers. We guide organizations through the process of creating or improving CX strategies, platforms and policies. Avtex offers a wide range of services to support CX, including CX Consulting, Technology Optimization, Technology Innovation and Systems Management.

Driven by technology know-how and passionate about customer experience, Avtex is uniquely qualified to help you deliver exceptional experiences to your customers.

Our Vision: Fueling Exceptional Customer Experiences

Our Mission: Using our technology know-how to enable our clients to deliver an exceptional experience to their customers.

How we do it: Leveraging our unparalleled breadth of knowledge and experience, we guide you through the process of identifying, implementing, and maintaining key strategies and technologies to drive effective Customer Experience.