



Addressing the Essentials of Proactive Engagement

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Biography

Lee Trenam is Head of Sales at VoiceSage (www.voicesage.com).

With 20 year's experience in the Customer Contact and Customer Experience (CC/CX) space, Lee is passionate and driven to help organizations across the private and public sectors offer disruptive and engaging solutions to drive better relationships with their customers and citizens.

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Abstract

Drawing on the results of a recent industry roundtable, VoiceSage's Lee Trenam looks at the increasing interest of brands in proactive engagement – and how the challenges can be overcome. In this article, the author gives the lowdown on insights gleaned from a roundtable discussion between front-line contact centre practitioners on how brands are getting to grips with the concept of proactive engagement.

Introduction

The debate – which we set up in partnership with the UK Contact Centre Forum – involved senior UK customer contact practitioners from several sectors including manufacturing, newspaper publishing, IT services and financial services.

The discussion revealed that practitioners are all too aware that they need to become more proactive – but don't feel they have enough knowledge to get over the challenges they believe are present in efficiently connecting users. Many of the participants said that a proactive approach was working in Marketing, but the crucial service side of the customer relationship was proving to be a bigger hurdle. Despite the challenges, however, they were much more open to the idea of new technology, including Artificial Intelligence (AI) and channels such as social media.

Some said that this openness masked a difficulty to prioritize and single out which channels people like to communicate on, which is often text, to get the desired results. Added to this, many found it a task to encourage customers to engage with them and actually see if what they were saying was being heard.



A progressive proactive approach

From the discussion we found that although organizations saw the value of proactive engagement, they were not going to adopt it at any price. Therefore, it needs to be a progressive approach, evolving within the means of the business.

One financial services professional, for example, said that due to compliance reasons his firm needs to send out information to a large number of businesses. Currently this is done via paper or email. To move to a real-time mechanism would require extra teams of contact centre staff, which it could not afford. To make it work technology would have to provide an efficient answer.

This technology would have to be powerful enough to link all the elements of the customer journey together quickly and easily. Does this solution exist across industries? This is a difficult one to answer. Not forgetting that many organizations are inextricably bonded to paper and this doesn't look like changing any time soon.

What is proactive?

What is the difference between offering proactive versus self-service? A good question and one that is still being discussed at length.

Practitioners know that providing online solutions and FAQs can be a real aid to active users, but it blurs when it comes to the idea of proactively dealing with customer problems before they become a real issue. Others are adamant that proactive is a great way of managing exceptions. This means looking at the problems of customers and addressing them on a less critical level to make sure they go away satisfied.

Everyone is talking about chatbots right now. But there is a serious debate about when is the right time to launch an AI/chatbot element to service channels. Some are confident that chatbots are ready to handle routine queries, while others still see their use as limited.

Whatever solution is adopted, it has got to be simple. The practitioners agreed that it has to be very easy for customers to communicate with brands in order to engage them properly.

Where is proactive heading?

Practitioners are all aware of the benefits that proactive engagement can bring, and they are all laying the foundations. But there is still a long way to go.

One of the biggest challenges for practitioners is in re-designing their view from the customer's shoes. Instead of seeing the customer as a number of channels that need to be linked together, they need to look at their proactive engagement strategy as a unified whole – where the customer has the power to communicate through their chosen channel. Only then will Proactive achieve its goal in retaining and acquiring new customers and building brand loyalty.