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Improving Employee and Customer Experience:
A Guide

Introduction

Many companies offer great products and services, but that's only half the battle. In order to succeed, you need to know how to both best serve your customers and empower your employees to do their jobs in a changing work environment.

In this guide, learn how to empower employees with mobile and social technologies, strengthen customer relationships, and shift focus from customer support to customer engagement.

EMPOWERING EMPLOYEES WITH MOBILE AND SOCIAL TECHNOLOGIES

The social and mobile revolution is well underway. While it is obvious how these social technologies have fortified themselves in consumer circles, utility in the enterprise is still a topic for debate amongst IT and business managers. The key, when evaluating the benefits of social and mobile technology in the workplace, is to determine whether they will provide a new level of immediacy, access, and action amongst employees.

Will introducing these new social technologies empower your employees and increase engagement? Do social and mobile technologies solve crucial problems faced by both business and IT?

Mobile and Social BPM are integral to the customer service strategies of the future. They are lynchpins in moving from a "system of record" to a "system of engagement" mindset that will exceed customer expectations.

These new social technologies can reveal new opportunities for immediate access to information, and an ability to quickly collaborate and resolve business events as they arise.

With Appian, information remains in context and accessible while on the go. Appian brings work into an era of social technology, a realm where immediate collaboration is possible.

Mobile And Social Technology Accelerates Decision Cycles

Making a decision in business requires three repeating steps: Awareness, Knowledge, and Action. This cycle, often referred to as the AKA cycle, happens every single time a business decision has to be made. As soon as there is a realization that something has happened or changed, the process of compiling information begins. Once sufficient data is collected and analyzed in-depth, decisions are made and operationalized in order to achieve results.

The faster AKA cycles can be completed, the quicker decisions can move from the conceptual stage to being implemented within proper channels. Being able to make smart business decisions more quickly, and operationalizing those decisions, is something that new mobile and social technologies can help facilitate.

Today, businesses demand access to cutting-edge technology that will sense, understand, and respond to market stimuli

at a staggering rate. According to market research done by Gartner, business process management (BPM) is a $2.5 billion market, while another $1 billion of the market goes towards enterprise social tools, and another $6.7 billion to customer relationship management (CRM). On top of those numbers, another $9.5 billion is earmarked for application development related to the previous three markets. That's a grand total of $19.7 billion.

Support Collaborative Feedback Amongst Stakeholders

With the Appian platform, a company can rally its resources and ensure smooth operations during even the most trying times. Take Crawford & Co, the world's largest independent provider of insurance claims management solutions. It has an expansive global network serving clients in more than 70 countries, and is the leading adjusting resource for natural and man-made disasters. Crawford & Co. is a process-centric organization with a large mobile workforce, and wanted to enable collaboration on rules-based claim services.

During Super Storm Sandy, there were 562 adjusters deployed, 44,085 calls received, and 48,744 claims made. With such large numbers, it is important for Crawford and Co. to be flexible, agile, and mobile, with a focus on customer-centric solutions.

The Crawford Desktop application it developed is a customizable portal platform with a modern presentation that allows users to access all applications, claim tasks, notifications, analytics, and content from one portal.

Another Crawford application is the Crawford CAT Connection. It provides real-time catastrophe resource management with an HR system integration, which allows for faster activation and deployment of adjusters, along with self-service functions. The CAT Connection is also mobile. As a tool for contract catastrophe adjusters, it works on all major mobile devices, supports the virtual workforce strategy, and uses social collaboration.

Crawford's applications span a wide range of functions, and they all take advantage of mobile and social collaboration to improve service, enable accountability, and increase agility.

Empowering Your Employees Through Engagement
The social and mobile revolution in enterprise technology holds the key to solving the crucial problems faced by business and IT — provided it is approached and incorporated in the right way. Otherwise, it will simply create new silos, add to application sprawl, increase the IT cost structure, and deliver limited business value.

The combination of enterprise social and mobile technology promises a new level of immediacy, access, and action for businesses. The pervasive influence of Facebook in the consumer market has prompted a rising tide of "enterprise social platforms" trying to bring social media into the workplace. Almost all the entrants taking advantage of this trend are missing the point. The golden ticket for business value is not bringing external social media into the workplace. It is bringing work into the realm of social technology. This is what Appian delivers.

Typical enterprise social platforms deliver better communication — but communication about what? They

don't hear about or post system-generated business events in real-time. They don't track collaboration in the context of an audit-able business process. They are no better than e-mail at enforcing business rules, ensuring quality task completion, and measuring process improvement. Where's the highly touted social advantage?

The best business outcomes are achieved when everyone swarms to collaborate and resolve a business event without losing process context and secure governance. This changes each individual business decision point into an immediate "collaboration moment." Business action is then taken right from the same social interface, no matter what underlying software applications are required, with no additional manual effort.

Take the insurance industry as an example. A system-generated feed post of a high-value customer's claim rejection — seen simultaneously by the head of the business unit, his staff, and the independent agent who brought in the customer — will spur action, provide a place for collaboration, and enable rapid response all in the same interface. In that case, bringing work into a social environment reduces the chance of the customer taking their business elsewhere. Add mobility to the mix, where those alerts are visible and accessible from any smartphone, tablet, or laptop, and you begin to understand the transformative potential for business.

Appian features the same ease of use that consumer social platforms offer. More importantly, though, it drives business value by automatically structuring, recording, and governing social collaboration with process context. Appian enables

you to bridge the worlds of structured enterprise processes and social collaboration.

The Benefits Of A Fully-Engaged Worker
Engagement, within the workplace, happens in two ways: First, employees engage with work process from a particular device (mobile, etc); second, employees engage with their colleagues, clients, customers, or suppliers to achieve their operational tasks. Thanks to technology, the lines between the two traditional modes of engagement are being blurred. Mobile and social technology have eliminated past barriers, and as a result, increased the problem-solving power in the enterprise. An always connected, always engaged workforce can get alerts instantly, quickly assess situations as they arise, and move towards and expedite resolutions faster than in the past, as long as they have the proper tools at their disposal.

Engaged employees can now solve problems, escalate them to a higher authority, or assign a team member to a problem immediately, before a situation grows beyond control.

Improved Customer Experience: Better Results, Faster Action, Full Visibility
When the customer experience is better, so are the results. The Bank of Tennessee (BoT) is a community bank in northeast Tennessee. It's a smaller bank, so they compete and win on service and the customer experience. Like other community banks, they face increased competition from larger financial institutions with much larger technology budgets. And since people aren't going into banks anymore, banks have to proactively adapt to customer demands or fade into obscurity. Finally, complex financial rules are growing daily and the burden of compliance is heavy.

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The BoT's strategy is to focus on the customer experience. BoT Senior Operations Officer Will Barrett focused on how Appian's mobile and social features could improve internal operations to enhance the customer experience.

How can financial services deploy mobile and social technologies? Barrett says there's a lot of uncertainty in the industry on how best to execute these powerful concepts. Mobile is the killer app — with the proliferation of smartphones and tablets, most executives and sales staff are armed with these devices. However, in the Enterprise, functionality hasn't evolved as quickly as the technology. Barrett says that organizations need to leverage current mobile technology into value-added work that goes beyond email.

The mortgage process was one of BoT's first initiatives in using Appian. It was a manual, paper-based process with too many exception paths, limited process visibility and audit trails, with bottlenecks from all the manual routing. One error could trigger a 50%+ increase in the process time! In Barrett's experience, most high profile issues are due to a lack of communication. Enter Appian, and a focus on mobility and social collaboration tied directly to work processes and enterprise data.

BoT didn't have to reinvent the wheel to use mobile — they could leverage existing systems and processes. Loan officers are able to take mortgage applications on an iPad, which provides process visibility and interactions no matter where they are. Decision makers are mobilized, and able to put the focus on the customer, which results in a better customer experience.

The end result for BoT is:

- 30% faster to complete the mortgage process
- Full process visibility
- Increased data quality
- Less re-work
- Decreased training time

THE HUMAN FACTOR: STRENGTHEN CUSTOMER RELATIONSHIPS

Another way to improve the customer experience is to look at why customers have problems with businesses, and how to better address these problems. If you can predict what those problems will be, you can often prevent them from arising in the first place. And if you give customer reps access to all the information they need, you can reduce interaction times and even the need for follow-up contact.

In contact centers today, for example, a customer calls because of a defect in the product, processes, technology or people and not because the customer wants to "have a chat." However, fewer than 1% of Millennials will actually let companies know they have a problem through call centers or email. Today's customers are empowered buyers and demand a new level of customer service.

By one estimate, 50% to 60% of inbound calls within financial services are driven by banks' own errors. Preventable first calls are inquiries as to when a statement is coming, the status of payments, or when a transaction will be posted to the customer's account. The second category is repeat calls, which occur when the customer is not serviced sufficiently the first time around or when the customer wishes to check on the status of existing service requests.

Another example is the auto industry. The average number of calls per day for an auto manufacturer is 6000 — 20 calls per day per agent, 24 minutes per call. How can organizations lower this number and prevent customer dissatisfaction?
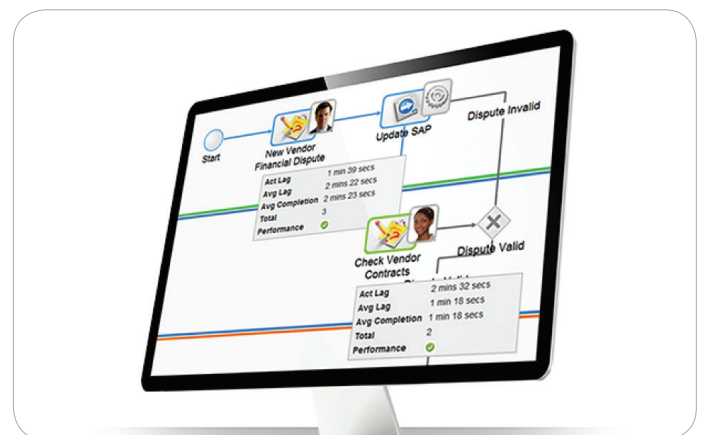
Process Optimization: Predict And Prevent Issues
You can lower costs and improve the customer experience by shifting the paradigm from traditional calls to digital outreach. Instead of putting emphasis on the customer service process, which leads to bad customer experiences, invert the model and put emphasis on predicting and preventing issues to begin with. Through process optimization and automation, organizations can spend more time on prevention, which leads to benefits:

- **Customer-Facing System of Engagement:** Manage all the various customer-facing touch points (such as forums, blogs, communities, chat, etc.) through Appian to replace core call center functionality. This results in reduced call volume and demand mitigation.

- **Employee-Facing System of Engagement:** Take the processes and knowledge from the core call center functionality and use Appian to improve and increase effectiveness, and optimize the processes. Appian combines multiple employee-facing touch points such as knowledge management, communities, and news feeds.

- **The Transformed Customer Experience Center:** Customer-facing touch points, core call center functionality, and employee-facing touch points all come together with Appian into one customer experience center, which allows analysis of text and sentiment.

A Single Interface For All Relevant Information
When a customer is on the phone, time is of the essence. Service reps need quick access to key customer data and records. Too much precious time is wasted on logging in and toggling between multiple applications to look up customer information, purchase and payment history, service records, and other data. Unnecessary delays, lack of information, or inaccurate data will only fuel customer frustration.

A single interface that allows service reps to access all the relevant customer information, regardless of where the data resides, will increase responsiveness and improve accuracy. An intuitive, no-training social interface will also help reduce training costs for call center staff, while facilitating internal collaboration and external engagement.

 A good example is John Lewis, the largest department store retailer in the UK. With its Customer Project Management (CPM) application, employees (or Partners, as they're called)

can manage customer case specifications and communicate case status in order to create a more seamless customer experience. The full lifecycle of the sale and delivery is monitored and can be changed to take account of customer requirements and internal priorities.

"With Appian our Partners can make each customer interaction more effective and productive, access the right data, and the whole process is visible at every stage of the customer journey," said Mark Fishman, Project Manager, Retail Operations Development, John Lewis. *"This supports our Omni-Channel aspirations and is all about: smarter decisions, faster action, and more transparency to deliver the best customer experience."*

SHIFTING FOCUS TOWARDS CUSTOMER ENGAGEMENT
Discussions around customer service strategies have shifted from "customer management" to "customer engagement." A piece in InformationWeek on "Seven Ways IT Can Improve Customer Service" highlights this shift. The article pays a lot of attention to process improvement and process consistency, including such important topics as understanding who your customers are, keeping communication channels fluid, and taking advantage of Web 2.0 tools to harness your customer community.

Know Your Customer
Knowing your customer, knowing how they like to communicate, and providing a consistent experience across all possible channels is vital. BPM software's value in stitching together disparate enterprise silos is well established, but social BPM extends that value to the new world of social media.

One powerful aspect of the Appian social interface is that is can incorporate social channels like Twitter into a business event feed. This gives companies an easy way to know when its customers are talking about the company — and that knowledge can be fed directly into process so that appropriate action can be taken in real-time. With peer-to-peer social dialogue on the rise, corporate marketing is no longer the generator and controller of the message. What matters now is knowing what conversations are happening, and having the business agility to participate.

Track Customer Interactions
At the same time, social BPM is more than just "social" because in addition to enabling direct customer conversations and collaborations — which any social enterprise platform can do — it also provides the means to track those interactions, keep them as an audit trail in the customer case, and learn from them to improve the product and service experience.

According to Forrester Research's senior analyst Kate Leggett, *"Your service experience should let customers start an interaction over one communication channel and complete it over another. To make this happen, CIOs must ensure that channels are not implemented in silos, but are integrated so that agents have a full view of all customer interactions."*

Provide Mobile Access To Core Business Applications
Another thing to remember is that we're past phone and email as the methods of customer interaction. Consumers are increasingly using new channels to interact— particularly mobile platforms. This is where mobile BPM becomes vital to an integrated strategy. By providing a native mobile app to consumers that is tied to enterprise process — the same processes running the call centers and web service platforms — consistent cross-platform service becomes a reality, not a pipe dream.

This holistic process and data exposure is equally key to another point: making sure service reps are armed with the data they need to deliver a stellar customer experience. *"Customer service systems must be more than just the front end of a database of customer information and cases,"* says Forrester's Leggett. *"They should also be integrated with back office applications so that agents can retrieve real-time answers to questions such as 'when did my order ship?'"*

This is where real-time data access within mobile and social process is crucial. And not just for reps in the call center. Field service personnel need it. The field sales force needs it. Any employee who comes into contact with a customer needs it.

ENTERPRISE SOCIAL NETWORKS TIED DIRECTLY TO WORK
In the beginning, many managers and IT departments failed to see the merits of introducing social networks into enterprise workflows. Since then, applications have been tailored to enterprise goals, and integrate workers' ad-hoc collaborations into their business operations.

More importantly, modern enterprise social networks now provide companies the ability to "crowd-source" problem-solving in a way that was unachievable in the past. A mobile, social workforce can deal with issues more quickly and effectively, saving a company time and money while increasing customer satisfaction and loyalty.

Proper Implementation Is Key To Social Enterprise Success
The key to building a successful, socially engaged enterprise is not bringing external social media into the work place; it's bringing work into the realm of social technology. Like all things, if improperly implemented, social and mobile technologies could lead to new silos, application sprawl, or increased IT costs. However, new levels of access, action, and immediacy can also be the result of a well executed social and mobile plan within enterprise.

Appian brings work into the realm of social technology. The application facilitates collaboration between employees, spurs on action, and enables rapid response all from within the application.

Add mobility to the mix, where those alerts are visible and accessible from any smartphone, tablet, or laptop, and you begin to understand the transformative potential for business.

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SUMMARY

Today's customers expect more from companies than ever before. Businesses need to reach out proactively instead of simply providing customer service as the need arises, and those customer interactions need to be smarter. Part of that comes from knowing your customers better, paying attention to what they're saying, and keeping track of how they like to communicate.

The good news is these goals are achievable by putting more information and power in the hands of your employees. Mobile access means being able to do business smarter,

more efficiently, and more collaboratively—wherever you are. Social tools let employees communicate with each other and allow customers to interact with you, in the ways they want. And customer engagement improves when employees have access to complete information from different systems at the time they need it.

You can learn more online about how Appian's Business Process Management platform can help your company improve both the employee and customer experience.

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As the market leader in modern Business Process Management (BPM) software, Appian delivers an enterprise application platform that unites users with all their data, processes, and collaborations — in one environment, on any mobile device, through

a simple social interface. On-premise and in the cloud, Appian is the fastest way to deliver innovative business applications.

For more information, visit www.appian.