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The Service and Support Leader Digest is a biannual publication that helps customer service and support leaders stay ahead on emerging trends and gain insights for their function. The articles in this issue will teach leaders how they can influence customer retention, spending and advocacy by ensuring service interactions deliver greater customer value — and an effortless experience.

Historically, customer service and support organizations have focused on delivering high-quality service at an ever lower cost. Success with this goal requires organizations to consistently and cost-effectively deliver the core promise of service: to resolve the customer issue as effortlessly and quickly as possible.

In this focus, customer service and support affected loyalty outcomes primarily by reducing downside risk. While low-effort service was unlikely to increase customer loyalty, poor service was sure to lead to unhappy — and ultimately disloyal — customers.

In the past few years, however, we have observed a shift in how customer service and support leaders view their function’s role in driving loyalty. In 3Q19, most customer service and support leaders we surveyed indicated their function’s role in driving customer retention had become more important than it was three years before. And in our interviews with Gartner clients, many indicated that their executive leaders had challenged their function to assume greater responsibility for top-line outcomes.

Now, customer service and support is not just “playing defense” through issue resolution; it is actively boosting retention rates and customer advocacy.

This role for customer service and support makes economic sense. First, acquiring new customers is more costly than retaining — and expanding services for — the existing customers. And customer service and support is well-positioned to support this outcome given its frequent interaction with and knowledge of existing customers. Second, many organizations face shrinking earnings as a result of depressed demand post-COVID-19. This makes customer service’s role in protecting revenue from existing customers even more important.

While low-effort customer service remains an essential part of any service strategy, it is insufficient to improve customer loyalty outcomes such as retention. To do so, customer service and support leaders must ensure not only that customers’ issues are resolved but also that they leave an interaction with greater value from the product or service they’ve purchased. Our latest research shows that this value enhancement via customer service has a significant economic upside. Customers who report greater value from their products or services following a service interaction are significantly more likely to renew, spend more and advocate on behalf of the company.

In this issue, we explore how best-in-class service organizations are rethinking their service delivery models to create more value for their customers beyond low-effort issue resolution. And we’ll see how these initiatives, in turn, maximize financial returns.

Tiffany Fountain, Managing Vice President
How Customer Service Drives Customer Loyalty

By Sarah Dibble
Customer service and support leaders report increasing pressure to contribute to organizational loyalty goals such as retention, growth and advocacy.

The urgency to deliver on these goals increases during periods of economic uncertainty, when customers tend to scrutinize their spending more closely.

Most service organizations have responded by leaning heavily on initiatives to improve service interaction quality, hoping those improvements will inspire increased customer loyalty. But our previous research has shown customer service’s primary responsibility lies with keeping customers from becoming disloyal by making it easy for them to resolve their issues, not in boosting loyalty.

To understand whether there is an expanded role for customer service in customer loyalty, we gathered data from customers about how and where their service interactions affect their loyalty for better or worse. We conducted a panel survey of over 6,000 global customers in various industries and across business models who had a recent service interaction. Our panel included over 2,000 customers who faced a stay-go decision after their service interaction — meaning that within 60 days of their service interaction they had to decide whether to continue their relationship with that company. These customers’ responses gave us the unique opportunity to examine behavioral loyalty outcomes (what customers actually did) in addition to the usual attitudinal loyalty outcomes (what customers said they would do).

The following results reconfirm the importance of service’s role in mitigating disloyalty:

• A customer whose issue is not resolved has an only 27% probability of choosing to stay with a company.

It’s clear that if customers don’t get their issues resolved — or get them resolved in a way that feels difficult — they are more likely to leave at the next opportunity. Therefore, customer service leaders cannot and should not abandon their focus on low-effort resolution.

However, these results also show that about 40% of customers will leave even if they do get low-effort issue resolution. Customer service leaders should therefore take advantage of any opportunities to do more during a service interaction. So we next researched what customer service could do, in addition to low-effort resolution, that would increase the likelihood that customers will stay.

A Different View of Success

Our analysis shows customer service can do something to not only mitigate disloyalty but also boost loyalty; however, it’s less about a service interaction’s quality and more about its impact on the customer’s perception of the company’s product or service.

• A customer whose issue is resolved in a low-effort manner has a 61% probability of choosing to stay with a company.
In our survey, we had customers evaluate a set of post-transaction statements:

• “After the customer service interaction, I am able to achieve more with the product/service.”
• “After the customer service interaction, my confidence in my decision to purchase the product/service is higher.”

These statements represent customer service’s success in “value enhancement.” Successful value enhancement significantly increases the probability a customer will stay following a service interaction (see Figure 1).

Value enhancement therefore represents an economically significant opportunity for service to boost customer loyalty, not just mitigate disloyalty. This opportunity holds in both high- and low-switching-cost industries and for various measures of loyalty, including retention, wallet share and positive word of mouth.

The Five Drivers of Value Enhancement

To effectively deliver value enhancement, service organizations must optimize their interactions to trigger the desired customer sentiments: the feeling they can achieve more with the product or service and confidence in their purchase decision.

Further data analysis uncovered five activities that trigger those feelings and therefore drive value enhancement during service interactions:

• **Educating customers on better uses** — Teach customers how best to use the product.
• **Advising customers on new uses** — Introduce customers to new or untapped product features.
• **Validating customer purchase decisions** — Reassure customers that their purchase decisions were smart ones.
• **Anticipating customer needs** — Predict features customers may find valuable in the future based on their current needs and usage.
• **Helping customers achieve a goal** — Outline the product features customers should use based on their goals for partnering with you.

These activities can take place in live and self-service channels, and several can occur in tandem.

**Figure 1. Effects of Resolution, Effort and Value Enhancement on Customer Loyalty**

<table>
<thead>
<tr>
<th>Probability of Staying</th>
<th>No Resolution</th>
<th>High-Effort Resolution</th>
<th>Low-Effort Resolution</th>
<th>Value Enhancement</th>
</tr>
</thead>
<tbody>
<tr>
<td>n = 2,196</td>
<td>27%</td>
<td>37%</td>
<td>61%</td>
<td>82%</td>
</tr>
</tbody>
</table>

Source: 2020 Gartner Loyalty Through Customer Service and Support Survey
Introducing the Value Enhancement Score

Our analysis revealed that value enhancement is more predictive of all customer loyalty dimensions than CSAT or NPS (see Figure 2). Incorporating value-enhancing activities is an important step toward reaping loyalty rewards, but an adjusted measurement strategy is also crucial. Measuring value enhancement enables service leaders to gather a baseline, identify the strongest value-enhancing opportunities and individuals, track progress and — most importantly — measure success. That’s why Gartner created the value enhancement score, an index comprising service’s scores on a scale of 1 to 7 for the following statements:

• “After the customer service interaction, I am able to achieve more with the product/service.” (1 represents “strongly disagree”; 7 represents “strongly agree.”)
• “After the customer service interaction, my confidence in my decision to purchase the product/service is ….” (1 represents “a lot lower”; 7 represents “a lot higher.”)

We recommend using both questions in post-transaction surveys and creating a single value enhancement index score by averaging the responses.

The Opportunity for Value Enhancement Is Growing

Value enhancement is relatively uncommon today (only 15% of customers report a value enhancement score of 6 or higher), but we believe there is a significant opportunity to expand the percentage of contacts where value enhancement occurs. This opportunity is the result of shifting contact type compositions and their relative suitability for value enhancement conversations.

The best opportunities for value enhancement occur during customer inquiries (e.g., general inquiries, requests for product or service information, troubleshooting) and “other” contact types (e.g., purchases, returns, payment). Since 2008, such contacts have increased by 115% and 113%, respectively (see Figure 3). In the same time period, contacts regarding product or service issues, checking or changing status, and

Figure 2. Relative Impact on Loyalty (Retention, Increased Wallet Share and Positive Word of Mouth) of NPS, CSAT and Value Enhancement Score

n = 2,196
1 Scale uses log odds as predictive accuracy.
Source: 2020 Gartner Loyalty Through Customer Service and Support Survey
complaints — which are all less favorable to value enhancement — have decreased or remained steady as a percentage of total volume.

Because of this shifting composition of contact types, we believe service organizations could increase the percentage of service interactions that produce value enhancement from 15% on average to 35% to 50%, depending on their own contact mixes. Small shifts in value enhancement have outsized effects on customer loyalty. Service and support leaders can reap huge economic benefits for their organizations if they capitalize on this favorable shift; however, those hoping to do so need a codified strategy.

Service’s Role Moving Forward

To increase the service function’s contributions to organizational retention and loyalty goals, customer service and support leaders should focus on providing low-effort resolution and using service interactions to help customers derive more value from their products or service. The ideal customer reaction following a service interaction is increased confidence in their original purchase decision and a feeling they can achieve more with the product or service.

Our findings suggest a significant role for service in boosting customer retention, advocacy and wallet share by helping customers feel better about their relationship with the company and the products or services it provides. This opportunity represents a categorical shift in the way we think about service’s role within the broader organization. Service’s remit now goes beyond mitigating disloyalty through the provision of high-quality service interactions to include boosting loyalty through value enhancement. And this shift is too important to be left to chance.

Service leaders must take advantage of this opportunity to expand service’s contributions and should take steps to formulate a strategy that incorporates this new responsibility.

Figure 3. Customer Contact Reasons, 2008 Versus 2020

n = 1,918 (2008); 6,004 (2020)

Gartner has studied customer effort and its impact on disloyalty for more than a decade. Back in 2008, when we first introduced the concept of customer effort, we primarily hoped to understand how customer service organizations could best increase customer loyalty. Surprisingly, we concluded then that a service interaction couldn’t increase loyalty, but it could decrease disloyalty. Mitigating disloyalty is a critical role for customer service, which is best executed through low-effort resolution.

Recently, our research has uncovered a mechanism through which service can increase loyalty: value enhancement. However, low-effort resolution continues to be central to any successful service strategy. Measuring and reducing customer effort remains a top priority for customer service, but the way customers interact with customer service has significantly changed. While customers still desire issue resolution with as much ease as possible, they now interact with organizations across a broad array of digital self-service and assisted customer service channels. So, more than a decade on from our original study, we wanted to understand how customers’ perception of effort changes based on the channels they use.

**Effort Remains Part “Do” and Part “Feel”**

When one thinks of effort in a service interaction, their first thoughts are often about actions they had to take. For example, did they have to call multiple times, or were they transferred to the right person? However, what a customer must do is only part of the effort equation. Customers’ interpretation of their interactions — how they
feel about an interaction — also affects their perceptions of effort.

In 2012, we found that the perception of effort is driven more by customers’ feelings about an interaction (“feel”) and less by the actual effort they exerted (“do”). In fact, we found that feel made up 63% of the effort experience, while do only accounted for 37% of effort.

In our 2020 research, we revisited the do and feel concept by asking over 6,000 international customers about their recent service journeys, focusing on the characteristics that ultimately drive customer effort. We included a full battery of do actions, such as achieving resolution, repeating information and being transferred, as well as feel perceptions such as control and transparency.

When we asked about effort, we found that the do and feel concept from our 2012 research still holds true. Regardless of the channel used, the feel characteristics are still the main drivers, driving 59% of customers’ perception of effort (see Figure 1).

Perceived Effort Differs Between Assisted and Self-Service Channels

In our most recent study, we pushed our analysis of customer effort even further, looking deeper into how customers experience effort in the various channels they use. After categorizing the channels customers used as primarily assisted or primarily self-service, we found that customers’ perception of effort differed substantially depending on which category they used (see Figure 2).

In assisted channels, the do factors (e.g., first-contact resolution, escalation, wait time) have a greater impact on effort, at 57%. In self-service channels, on the other hand, customers care less about those factors. In fact, do factors have a 25% smaller impact in self-service channels than they do in assisted channels. With such a huge variation in how customers experience effort in different channels, we must dive deeper to learn what is causing this channel-specific effect.

Figure 1. Change in Effort Perception Over the Years

<table>
<thead>
<tr>
<th>Customer Effort in 2012</th>
<th>Versus</th>
<th>Customer Effort in 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>37% Do</td>
<td>41% Do</td>
<td></td>
</tr>
<tr>
<td>63% Feel</td>
<td>59% Feel</td>
<td></td>
</tr>
</tbody>
</table>

n = 17,968
n = 6,004

Expectations for Resolution Are High in Assisted Channels

As customer service and support leaders know, effort reduction plays a large role in keeping customers satisfied and part of the business. That’s why it is so important to understand how quickly customers will punish a service organization for high effort in an assisted channel setting. Although feel factors are still important in any channel, our regression analysis shows that the most important factors in effort reduction for assisted channels fall in the do category (see Figure 3).

Figure 3 lists more feel factors influencing customer perception of effort, but those factors have significantly less impact on how customers remember effort following an interaction. When customers make significant levels of actual exertion (for example, multiple escalations that require repeated information and an additional call for resolution), it is easy to understand why do outweighs the feel in assisted channels.
Customers Are More Forgiving in Self-Service Channels

Conversely, we find that customers are willing to put in more time and effort to solve their problems in self-service channels; they don’t care if they have to start and stop multiple times, and they don’t mind if resolution takes up to 24 hours (see Figure 4). Instead, feeling they are in control of the journey and being guided through the process toward resolution is what customers remember after a self-service interaction.

Conclusion

Addressing customer effort remains one of the most important tasks for service organizations today, but organizations must take a more nuanced approach that accounts for the differences between service channels.

As channel strategies continue to mature, customer service and support leaders will need to adjust their overall strategies for delivering a low-effort experience based on the channel they choose to optimize. In assisted channels, it is still extremely important to resolve issues on the first contact, with minimal escalation and hold time.

On the other hand, self-service channels should focus more on customers’ perception of the experience. Making information accessible and transparent will impact customer effort more than reducing wait time or shortening time to resolution.

Figure 4. Insignificant Effort Factors in Self-Service Channels

n = 6,004
Source: 2020 Gartner Loyalty Through Customer Service and Support Survey
Many service organizations are actively investing in digital service channels to meet customer demand and reduce cost to serve.

However, the addition of new channels often makes it more difficult to deliver a seamless experience that guides customers to the most valuable interactions for them and for the organization. Rather than relying on customers and employees to identify the best channel to visit and action to take, the Commonwealth Bank of Australia (CBA) created a dynamic decision-making engine. It sits on top of all of the data and is integrated into all of CBA’s channels. It recommends the next best conversation for each customer at any given moment. This approach creates a connected and relevant experience for customers regardless of channel.

At its core, CBA’s Customer Engagement Engine (CEE) predicts the most relevant, tailored actions to take on behalf of a customer. It then directs those actions to the best-fit channel for a particular situation — either proactively reaching out to a customer or prompting an employee during an assisted service interaction.

The CEE was built in partnership with Pegasystems and is enabled by 300 machine learning models. When predicting the best action to take on behalf of a customer, the CEE analyzes 157 billion customer and business data points.

The Customer Engagement Engine in Practice

Over 2,000 interaction types are orchestrated through the CEE. Some of these interaction types are suggested to employees, who make offers to the customers or recommend the customers take a specific action. For example, when a customer fitting a particular set of criteria calls the contact center, the rep receives an alert recommending
the customer switch to a higher-yield savings account (see Figure 1). Other interaction types are proactive — for example, alerting customers when a recurring fee increases, sending customers instructions on how to enroll in rebates or benefits, or notifying customers when they have not completed an application. Having the CEE automatically identify and suggest interactions or actions to take makes it easier for employees to provide a great customer service experience and improves customers’ overall experience with CBA’s products.

**Figure 1. Example Customer Journeys**

<table>
<thead>
<tr>
<th>Introduce a Better-Fit Product</th>
<th>Anticipate Customers’ Needs — External Issue</th>
<th>Help Customers Achieve a Goal (Financial Well-Being)</th>
<th>Anticipate Customers’ Needs — Internal Issue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer calls about credit card balance.</td>
<td>CEE recognizes a recurring fee has increased in price.</td>
<td>Customer updates personal information.</td>
<td>Customer completes a loan application but hasn’t signed it.</td>
</tr>
<tr>
<td>CEE recognizes the customer could be in a higher-yield savings account.</td>
<td>An alert is sent to the customer. “Huh, I should reevaluate.”</td>
<td>CEE recognizes this customer is eligible for an energy rebate.</td>
<td>“Hmm, I’m not sure what to do here…”</td>
</tr>
<tr>
<td>“Your credit card balance is this…”</td>
<td>Enrollment message is pushed to customer via app. “Oh neat. I should enroll in this.”</td>
<td></td>
<td>CEE recognizes parts are incomplete.</td>
</tr>
<tr>
<td>“By the way, you’re eligible for this higher-yield savings account. Are you interested in exploring that today?”</td>
<td></td>
<td>Real-time digital message is sent out to customers with an explanation of remaining steps and a link to complete.</td>
<td></td>
</tr>
<tr>
<td>“Yes, I am interested.”</td>
<td></td>
<td>If the customer doesn’t take action, an email is sent out the next day, and CBA calls the customer three days later.</td>
<td></td>
</tr>
</tbody>
</table>

“Oh okay, I’ll finish it.”

Source: Adapted From the Commonwealth Bank of Australia
The Goal: Connecting Experiences Across Channels

The CEE creates a channel interaction strategy that fundamentally differs from the typical omnichannel strategy (see Figure 2). Omnichannel strategies allow organizations to have a 360-degree view of the customer — to understand past and present customer behavior and share information across channels — but they cannot manage the experience across channels.

A system with a central decision-making engine like the CEE allows organizations to orchestrate the customer journey based on each customer’s — and the company’s — desired outcome, regardless of channel. This creates a better customer experience because, instead of receiving any number of potentially relevant interactions, customers receive the best possible interaction for their needs at the right time and in the most appropriate channel.

Rightsizing the Initial Investment

While CBA’s CEE now orchestrates over 2,000 interaction types across the company’s entire channel portfolio, it originally started in a single bank branch with only 30 interaction types. By starting with that limited set of interaction types in a single channel, leaders proved that the CEE worked, that the returns justified the initial investment and that it was worth expanding.

Figure 2. Comparison of Typical Omnichannel Strategy With the CEE

Source: Adapted From the Commonwealth Bank of Australia
CBA advises other organizations to:

• **Start Where You Have Data.** Reduce the time it takes to deploy by starting where data already exists and is high-quality in terms of both accuracy and how quickly it is updated and processed.

• **Start With Simple Initiatives That Have Outsize Financial Impact.** Demonstrating financial returns quickly can justify existing investments and help secure additional funding. Predetermine measures of success, and take care to ensure the investment’s effectiveness can be directly attributed to this specific initiative.

• **Roll Out in Phases Across Channels.** Rather than starting with one interaction type across all channels, build a number of interaction types in one channel. Then, perfect the interactions in that channel before moving on to the next channel.

**Results**

Over the past five years, CBA has seen a significant return on its investment from all use cases, and it achieved all the benefits promised in its business case. In addition, CBA’s Net Promoter Score for its mobile app is 12 points higher than its competitors’. CBA has had positive results at the interaction level as well, with a 12% increase in the number of customers opening a higher-yield savings account as a result of a CEE-suggested interaction.

By using the CEE, the company has generated 10 times the number of conversations it had before with customers to help them in their home-buying journeys. And as part of CBA’s “benefit finder” interaction, customers have claimed over $150 million dollars in benefits. Finally, the percentage of customers who completed a loan application has increased as well.
What is a Customer Engagement Engine (CEE)?
The CEE is a dynamic decision-making engine that sits on top of all the data and is integrated into all of CBA’s channels. It uses 157 billion customer and business data points, including transaction data, demographic data, channel behavior and contact history to predict the most relevant, tailored actions to take on behalf of a customer. When suggesting an interaction, the CEE chooses the best-fit channel or communication method for the customer’s particular situation and context. This tracks and connects the customer experience across channels and orchestrates relevant next best conversations in whichever channel suits the customer’s needs best.

Why did you decide to create the CEE?
The cornerstone of this approach was connecting channels to create a customer-centric experience. With 7.4 million digitally active customers, we need to understand each customer’s individual needs and how they are interacting within our digital and assisted channels. A vast majority of our customers who...
call us do so because they may not be able to complete something on their own, and they often don’t want to retell that story. In order to provide a great experience, we needed to make sure that every channel had the very best conversation (or set of conversations and experiences) that ultimately supports customers’ financial well-being. The CEE helps us use customer information in a way that empowers customers to help their own banking experience.

**How does the CEE determine which types of interactions or next best conversations to provide to customers?**

Machine learning manages the number of times we talk to customers and in which channels. Our machine learning capability allows us to understand what message to show, how many times we should show a message, how customers engage with that channel or render content, and how they interact with us based on previous messages we’ve shared. Machine learning and AI help us tailor our messages rather than prejudge that every customer should get an email every 14 days.

When we make decisions about what action to take, large or small, we think about whether it’s the right thing to do from a customer point of view. Most of the time it’s straightforward, but other times it’s complex, and that’s when we use experimentation. The CEE can rapidly test ideas against subsets of customers, and we can easily measure the outcome. This allows us to determine whether to proceed with a new conversation or continue to experiment and refine the experience. For example, we ran a test to see whether customers were more likely to save when receiving a message before or after payday. Overwhelmingly, we saw customers were more likely to save if they received the message after they received their pay. So we quickly adapted our targeting to this group.

**What tools, systems and resources did you have in place for this to work?**

We were very conscious of ensuring we were able to put a prototype in the hands of our users and test with our customers. To do so, we selected a representative group of our customers as well as staff and relationship managers in representative branches and call centers to create an early pilot version of the CEE. We used that pilot to show our customers the different experience we were creating and were able to move this live in six weeks. This was an incredible test bed for us. We were able to learn from what our very best staff were doing and codify the best conversations for all of our staff to have with their customers. In addition, our senior leaders and sponsors were able to visit and see the change we were making. It created a huge amount of engagement with the ideas and momentum for the program.

The CEE can rapidly test ideas against subsets of customers, and we can easily measure the outcome. This allows us to determine whether to proceed with a new conversation or continue to experiment and refine the experience.

**How has the CEE evolved over time?**

Two things changed, which surprised us. The first was the unbelievable scale at which we have been able to shift conversations to digital channels. We knew as we accelerated investments in digital that it was going to significantly increase the amount of interactions and data, but we didn’t fully appreciate at the time just how big it would be. For example, our app — in tandem with and sometimes because of the CEE — has grown massively. Now we have a huge bank of data to show how much better it is for customers to give them a tailored experience when they’re getting a coordinated series of conversations across channels.

The CEE helps us use customer information in a way that empowers customers to help their own banking experience.
The second and most exciting thing is we recently conceived a new way to determine what’s the next best contact for a customer. Previously, we were thinking about individual channels — for example, how to best do messaging in the app. We are now providing end-to-end experiences in the CEE, such as explaining benefits and connecting customers to rebates that they might be entitled to, which is a very un-bank-like thing to do.

The CEE has also been instrumental in our coronavirus response. Through the CEE, we have delivered over 250 million personalized in-app messages directing customers to support for their situations, including hardship requests, express service and alternative banking options as well as general information. Through next best conversations, we have had over 4 million visits to our new online COVID-19 support page.

How have you staffed this project, and did that model have to change?

The idea was born out of our executive strategy team as a customer relationship project and now sits under the data and decision science team. We tried from the very beginning to work in multifunctional teams. The success of the CEE comes from the combination of expertise and experience from our product teams, channel teams, marketing teams and data teams.

We had around 20 people when we started in 2015. As the project rolled out and started becoming “business as usual,” we recognized that we didn’t have the ability to scale where we wanted to. We now have an excess of 200 people working with the CEE directly to program, test or help integrate it into affiliated lines of business.

How long did it take to launch from the initial idea, and how long did it take to see tangible results?

The results were immediate. Staff now had tools available to have highly relevant and contextual conversations with their customers. We rolled it out across all of our branches and call centers at the end of 2016 and into all channels across the retail bank (including our app), and we are continuing to build experiences for our customers at scale.

What advice would you give to leaders interested in starting a similar project?

You need to have organizational buy-in. It’s so important that all the senior leaders from product, channel, marketing and data teams believe in what you are trying to achieve together. Be really thoughtful in the order and sequence of what you deliver; don’t try to do all channels and products at the same time. Critical to the success of any program like this is early momentum; get some runs on the board early to convince those who need convincing. Be prepared to experiment and fail. Not everything will work exactly as you think it will.
Customer service and support leaders must prioritize employees’ health and safety as organizations make plans to reopen offices. It is imperative to conduct a thorough assessment of the work environment and make the needed adjustments to properly prepare offices for employees’ return.

With stay-at-home orders being lifted and phased reopenings occurring globally, companies that adopted work-from-home models due to COVID-19 are debating whether to keep employees remote, bring them back to the office or develop a hybrid model. Gartner research shows that providing a workspace for employees who are not productive at home is the most important need for customer service leaders now.

However, companies cannot simply open the doors to their facilities and invite employees back into their pre-COVID-19 workspaces.

Given the nature of the virus and health official recommendations regarding social distancing and proper hygiene, customer service leaders must identify the modifications required to ensure their facilities meet new guidelines and to protect employee well-being. It is imperative for companies to thoroughly assess the work environment and make the needed adjustments to meet social distancing and hygiene requirements so they can allay staff fears and put employees’ minds at ease. Employees must be able to trust the company’s actions to protect them.

Research Highlights

When developing a return-to-office program, Gartner recommends that customer service leaders consider the following:

1. **Current Office Conditions** — Trace employees’ typical steps in the office, and review each area (such as break rooms, meeting spaces, collaboration spaces, restrooms and dining areas) to identify where changes must be made to allow social distancing and reduce the spread of germs. Survey employees to capture their needs, expectations and concerns about returning to the office, and incorporate these results into the return-to-office plan.
2. **Employee Hygiene Modifications** — Distribute hygiene guidelines to employees, and provide training to employees returning to the office on any hygiene behavior modifications they must follow.

3. **Social Distancing Modifications** — Move or remove extra workspaces to ensure employees have proper distance between them. Adjust seating in conference or training rooms as well as break rooms to meet the spacing rules. Post maximum occupancy and social distancing requirements in bathrooms, elevators and conference rooms.

4. **Facility Requirements** — Implement touchless infrastructure where possible, such as motion-activated lights, sinks, toilets and soap dispensers. Install dividers between offices in open-concept or low-wall office setups so there is a physical barrier between workspaces. Configure the office so employees do not have to share workstations and hardware.

5. **Return-to-Office Criteria** — Develop a staged return-to-office plan that considers employees who volunteer to return, essential services that must be staffed in the office and high-risk groups. Stagger days for being in the office, or adjust shifts to reduce capacity to help achieve social distancing requirements.

6. **Communication and Management Changes** — Ensure communication regarding returning to the office is sent weeks in advance of implementation to allow employees to make accommodations and adjust. This communication should include the changes made to the office to prioritize employee health and well-being as well as new policies and procedures, and how staff reintegration to the office will occur.

Customer service leaders must partner with their legal, HR, IT, real estate and finance business counterparts to develop a return-to-work plan because of the wide-ranging impact this plan will have for functions and for the organization’s service delivery. Failure to adequately prepare the office with employee well-being in mind will increase the risk of exposing staff to the virus and create mental and emotional stress. The results of this could be costly to an organization, creating issues with absenteeism, morale, productivity, retention, employee cynicism and brand reputation, and ultimately impacting the customer experience, revenue, cost and quality.
2020 Calendar of Upcoming Events

**Virtual Executive Meetings**

Driving Customer Retention and Loyalty Through Service
- 13 October | 2 p.m. – 4 p.m. ET
- 10 December | 10 a.m. – 12 p.m. ET

**Virtual Leadership Sessions**

Improving Performance Through Rep Experience
- 5 November | 10 a.m. – 12 p.m. ET
- 10 November | 10 a.m. – 12 p.m. AET

**Upcoming Webinars**

- **October**
  Operationalizing Value Enhancement: How to Drive Loyalty Through Service

- **November**
  Key Trends in Service Leaders’ Budgets and Priorities for 2021

Note: All upcoming events are subject to change.  
1. Executive meetings are reserved for heads of customer service and support. Please check with your Gartner account executive for registration.  
2. Leadership sessions are reserved for Gartner Customer Contact Leadership Council clients. Please check with your Gartner account executive for registration.