

Does your proactive engagement strategies make or break the customer experience?



- | YES | NO | CX Focus & Ongoing Engagement Strategies |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Are you preempting the need for customer service with proactive notifications such as voice, SMS/text or email reminders or alerts? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you using a multi-channel approach? |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you thought about how voice, SMS and email can work together? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you coordinate inbound and outbound customer care strategies across your organization? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you utilize APIs to create a seamless user experience across different portals? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have a strategy to document message attempts and delivery failures and drive continuous improvement? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are customer segments and engagement tactics standardized across channels and across departments? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you empower your customers to interact according to their personal preferences by specifying, for example, channel, type of message or time of day? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do your customer engagement strategies align with the overall business strategy? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you benchmark performance of specific channels and use that business intelligence/reporting to improve usability? |
| <input type="checkbox"/> | <input type="checkbox"/> | Overall, does your proactive outreach strategies meet or exceed your customer's expectations? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you currently analyzing your customer's expectations as they relate to your outreach strategies? |

Compliance

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Do you know which phone numbers are landlines and which are cell phones? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have access to a Do Not Call List (DNC)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you familiar with the TCPA rules regarding texting (opt-in)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you familiar with the TCPA rules for calling a mobile phone that has been ported or disconnected? |
| <input type="checkbox"/> | <input type="checkbox"/> | Can you seamlessly pivot your strategies in parallel with an ever-changing compliance rulebook? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you honor customer data privacy with a focus on building trust, rather than simply covering legal risks? |

Strategies for Customer Opt-in and Adoption

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have customer consent to send proactive notifications? |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you given them the freedom to opt-in and -out as they please? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you know which of your customers should no longer be contacted? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you use business rules to exclude or include certain customers from one message or another for various business reasons? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have strategies in place to provide visibility and adoption of proactive messages so customers opt in to receive your messages? |

YES NO

Business Intelligence and Analytics

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Do you conduct data-driven A/B testing (champion challengers) to compare campaigns and refine outreach approaches? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you monitor real-time and historical data to uncover insights that help you understand cause and effect? If so, do you take action on those discoveries? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you use advanced data science to predict intent and behavior? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you use data and analytics to define and continually refine key performance indicators? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you tailor communications to support more individualized customer conversations that take things like demographic information or historical behavior into account? |

Success Measures / Key Performance Indicators

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Have you identified and articulated business success measures? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have a proven system (checks and balances) in place to qualify and address unsatisfactory results? |

“YES” TOTAL

SCORE

Add the total “yes” answers together to come to your final score, then compare it to the answer guide below for an assessment of your current proactive engagement strategy and the kind of customer experience it probably provides.

25+: IMPRESSIVE (CONNECTED)

You are promoting intuitive self-service with seamless multi-channel capabilities and proactive communication to preempt some need for inbound customer support. Cross-functional visibility is decreasing the level of effort for customers and employees alike. Now, more of your attention can be focused on using data to drive smart incremental improvements and get more predictive.

15-25: NEEDS TWEAKS (MULTI-CHANNEL)

Your customer support is largely reactive. Whether or not you have proactive engagement strategies in place, there is limited visibility across functions and limited integration between channels. Objectives, processes and information are likely driven inside-out, from functional silos. By putting the customer first and finding points of integration, you will be on a path to a connected and proactive engagement strategy.

< 15: NEEDS AN UPGRADE (DISCONNECTED)

You likely have distinct activities for each of the customer's functional needs and organization's operational processes. The CX is characterized by minimal choice, convenience and control; operations and performance metrics are evaluated in silos. There is no cross-channel orchestration and limited, if any use of data. Quick wins will help you work your way toward a more seamless multi-channel approach.