
E-BOOK

Your Complete Customer Engagement Handbook



This solution guide offers the critical factors needed to build a company-wide platform that enables you to automate and deliver innovative customer experiences at scale. With it, you'll learn how to engage customers while increasing sales opportunities, revenue, marketing conversions, and employee satisfaction.





INTRODUCTION

Customer Engagement Defined

Customer engagement is the emotional connection between your company and your customers: sentiments which strongly influence their buying decisions. Customers who actively engage with a business tend to be more loyal and will, ultimately, choose to spend their money supporting the brands they love.


In return for their loyalty, today's customers expect businesses to interact with them on their terms — at any time, and on any channel — whether it's text, voice, social, self-help, or web chats. More importantly, when customers make that connection, they expect conversations to transition seamlessly between channels and demand an inherent understanding of their intent.

To win in today's economy, brands and businesses are adopting a customer-first mentality to exceed client expectations. Accompanying this are new customer engagement technologies and processes that are agile, intelligent, and proactive.



What You'll Learn

This e-book will help guide you through the considerations, tactics, and technologies needed to take your contact center to the next level and build a platform around your customer engagement strategy that will empower your employees to connect with customers on a more personal level, ensuring a positive experience every time. In this guide, you will discover:

- Signs You Need A Platform for Customer Engagement
 - How To Align Your Business Around The Customer Engagement Lifecycle
 - Productivity and Bottom Line Benefits of Successful Engagement
 - Real World Results: Digital Transformation in Action
 - 5 Steps To Design Your Customer Engagement Strategy to Maximize ROI
 - Your Complete Customer Engagement Solution
 - Common Terms: Back of Book Bonus
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Signs You Need A Platform for Customer Engagement

Your staff is unempowered and disconnected.

If your company is grappling with how to provide a single view of the customer, eliminate departmental silos, or work more efficiently, your employees are probably also struggling.

- Is your marketing department unable to contextualize personal communications?
- Are your sales teams not getting the hottest leads first?
- Do agents navigate multiple systems to respond to a single customer inquiry?
- Is it taking your IT department way too long to adapt to today's digital demands?

If you answer 'yes' to any of these questions, your contact center is probably outdated. Consider investing in a programmable contact center platform that empowers your employees to develop, customize, and manage your communications in a more intuitive and customer-centric way.



You're unable to connect on your customer's preferred communication channels.

According to Accenture, nearly half of today's consumers are comfortable crossing back and forth between digital and physical interactions with companies. If you're among the many businesses who are unprepared for this, consider the following:

- 70% of businesses think they're effectively communicating with their customers, but only 2 out of 10 customers agree.
- 59% of consumers are frustrated when they can't access the information they want in their communication method of choice.
- 9 out of 10 global consumers want to text with businesses, but only 48% of businesses are equipped with SMS.

If your business is not making it easy for customers to engage with you, they may not give you a second chance. In fact, over 50% of customers leave a brand after just one bad experience! To prevent this, consider an omnichannel contact center solution that allows your employees to easily engage with customers in whichever channel they prefer. Extra points if you select a platform that can scale and adapt to today's digital channels as quickly as your customers adopt them.



You're not listening to your customers. In fact, you don't even really know them.

It's tough for a customer to love (or trust) a brand that doesn't recall their last purchase, their most recent conversation, or their preferred way of reaching out. To facilitate better connections, create a single view of the customer and use analytics to provide more accurate and intuitive responses. An omnichannel solution will:

- Provide marketers and agents with a real-time repository of all of customer data.
- Apply new analytic capabilities to examine and understand the data trail for an adaptive customer journey.
- Integrate AI-based "conversational assistants" into self-help tools to move the conversation along.
- Leverage natural language processing to automatically interpret meaning and deliver context into every conversation.

By employing an intelligent software that shares everything your company needs to know about the customer, your employees can have enlightened conversations to better serve, nurture, and grow these relationships.



Your systems aren't adapting with the times fast enough.

In a recent study, 40% of contact center leaders revealed that their systems don't meet today's needs. Worse, more than half feel their systems won't meet future needs. If your technology isn't up to par, how can you expect to engage your customers? To keep from being left behind, modern businesses are turning to cloud communication providers to:

- Eliminate lengthy configuration processes innate with legacy contact center systems.
- Empower developers with easy-to-use APIs to add real-time communications features into applications without having to build backend infrastructure and interfaces.
- Stamp out maintenance, licensing, and professional services expenses by discontinuing legacy systems.
- Rely on a secure, global infrastructure to easily expand telecom usage needs on-demand, without additional time or expense to update hardware.

IDC notes that the demand for cloud-based contact center solutions is outpacing the demand for on-premise solutions, and with good reason. By moving your communications from legacy, on-premise systems to cloud-based software, you can experience greater reliability, global carrier connectivity, and robust security. With the right platform, you can build the exact solution needed to best communicate with, and service, your customers.



How To Align Your Business Around The Customer Engagement Lifecycle

An intelligent, customer-centric platform isn't the only thing you'll need to reliably engage your customer; you'll also need to embrace a customer-first philosophy. In all likelihood, your customers are already having various conversations with multiple touch points across the company; you just need to connect the dots.

By understanding the Customer Engagement Lifecycle, you can break down the organizational silos, design a process that empowers employees with the tools needed to interact successfully, and intelligently automate these interactions wherever possible to ensure seamless customer experiences.



Customer Engagement Lifecycle



Marketing paves the way.

As the department charged with customer acquisition, marketing is often a brand's first connection with a prospective customer. Since marketers are spending much more time than ever interacting directly with prospects and customers, they need engagement tools that allow them to:

- Drive personal and contextual omnichannel interactions in real-time.
- Improve conversions by accurately and expeditiously managing and routing leads.
- Apply new lead tracking techniques to measure marketing return on investment (ROI) and improve performance.
- Design engaging, customized interactions and respond instantaneously with simple drag-and-drop interface tools.



Sales closes the deal.

Once a prospect has raised their hand or an existing customer is primed to spend more, sales or business development teams are on the hook. Advanced technologies are enabling sales departments to do their jobs better and faster, particularly when leads are funneled with more accuracy and insight. Critical for this stage is to:

- Easily and dynamically connect to the customer on whatever channel they prefer.
- Help vet leads with Interactive Voice Response (IVR) systems and "conversation assistants" prior to engagement.
- Provide dashboards that offer comprehensive customer views and the intelligence that sales teams need to fuel insightful conversations.



Delivery rises to meet expectations.

Possibly the most challenging aspect of the customer engagement lifecycle is the fulfillment stage, as it directly impacts the customer experience. Given today's digital age, customers expect receipt of a product or delivery of service faster than ever before. Being mobile-first has truly made automating many of these processes more interactive and responsive. Companies can now:

- Automate and send instant notifications, alerts, and appointment reminders via SMS or IVR.
- Provide real-time delivery and tracking information over multiple channels.
- Connect customers directly with an individual delivery person via a mobile device, leveraging text and voice for more personalized interactions.
- Provide agents with real-time dashboards for a comprehensive view of delivery status, payment confirmations, and customer commentary with built-in alerts if something goes awry.



Support ensures satisfaction.

Support agents directly engage with your customers by responding to questions, resolving issues, processing returns, accepting payments, and handling collection-related activities. This has been made smoother with automation:

- Simplify payment collection, agent routing and gather feedback through self-help tools, such as IVRs.
- Respond to consumer questions faster with automated, context-driven text messages.
- Securely funnel callers to appropriate agents by infusing IVRs with real-time contextual analytics.
- Delight customers by easily connecting with them on the channels they use every day.

Companies that align service and marketing programs around the customer report a 55% annual increase in customer satisfaction, and their sales teams experience a 41% annual growth in their attainment of quota, according to Aberdeen. By understanding the customer engagement lifecycle, you can design a process that maps to your customer journey. You can also automate much of the customer communications process to allow for a seemingly personalized interaction at any stage.



Productivity and Bottom Line Benefits of Successful Engagement

By aligning the right technologies and processes with a customer-centric culture, your rewards are significant. In a [recent study](#) of companies that have undergone a digital transformation focused on the customer experience, over 84% have experienced revenue uplifts and 79% report cost savings. Other demonstrable benefits include:

Relevant proactive communications.

A fully engaged customer represents a 23% premium over the average customer in terms of share of wallet, profitability, revenue, and relationship growth.

Adapt your conversations and use advanced analytics to better understand and anticipate your customer's intent during each stage of the customer journey. That way you can create more personalized relationships with your customers as their needs and desires are met.

Increased revenue and upsell opportunities.

Returning customers spend 67% more than new customers.

By improving lead routing, creating a context-rich understanding of the customer, and enabling sales to pick up where the conversation left off, your agents can focus on what they are good at — selling. And if it's a returning customer, you'll know what they've already purchased, when you've last interacted with them, and the best way to move them through the sales funnel.



Streamlined operations and efficiencies.

Over half of an agent's time is spent sifting through data, searching for customer information stored in multiple locations.

With a modern platform for customer engagement — one that provides an AI-driven dashboard view of the customer — agents can easily pivot across channels to conveniently connect in whichever method makes the most sense for the customer.

Ability to adapt and grow exponentially.

Forrester reports that companies can experience an average cost savings of \$1.1M by discontinuing legacy communications platforms and associated processes.

By moving communications out of hardware into the realm of cloud-based software, you can convert capital expenditures to operations expenditures. By leveraging the cloud, you can prototype, build, deploy, and rapidly iterate new communication solutions with little or no impact on your operating budget. Plus, with the right cloud communications platform, you will get the benefit of a secure, compliant global infrastructure and carrier network for your business communications, without the burden of maintaining those complex services yourself.



REAL WORLD RESULTS

Digital Transformation in Action: Simply Business

Simply Business, a Traveler's Insurance company, transformed their contact center by re-engineering the way they interact with their customers. By combining omnichannel communications, customer data analytics, and tapping Twilio's global network, they have been able to measure, respond, and adapt to every step of the customer journey. Results include:

- A 15% increase in call handling rate.
- A five-point increase in Net Promoter Score (NPS).
- A dramatic decrease in wait times.
- A 9% uplift in inbound sales conversion.
- A 17% increase in outbound contact rate.

[See the Simply Business Story](#)



Twilio helps us optimize the workflow of our consultants so they can concentrate on having a phenomenal conversation and solving our customers' problems, rather than thinking about the technology.

Jason Stockwood, CEO, Simply Business



5 Steps to Design Your Customer Engagement Strategy to Maximize ROI

Customer engagement is crucial to your organizational strategy. It has been proven to increase customer loyalty, improve employee productivity, and have a positive impact on the bottom line. While designing your customer engagement strategy, keep these five considerations in mind to propel your company's future growth:

1 Align and empower your staff.

For successful alignment across the organization, simplification is key. You need a cloud communications platform that provides every employee interacting with your customer with the right tools and the right information, all at the right time. Enable employees with easy-to-use interaction tools such as drag-and-drop visual builders to customize messages, route leads, and design interfaces to proactively support the customer journey. Your developers should have simple communication APIs to allow for ease of integration of your communication solutions and be able to easily add new channels as your customers adopt them. They all should have a simple dashboard with which to engage.

2 Create a unified and shared view of the customer.

Make it your mission to develop one single source of truth about your customers. Employees interacting with them should have no questions about who the customer is, what they've purchased and when, and what was discussed during previous interactions. With this information, your employees can personalize conversations, reinforce marketing messages, make sales based on qualified interest, and know how best to respond to your customer's real-time requirements.



3 Drive proactive customer engagement channels.

Once you know what makes your customer tick, you can then refine messaging across all channels and touchpoints. Understanding where your customer is in their journey lets you engage with them on their terms and proactively present offers tailored just for them, contact them about delivery, and send timely reminders anticipating their needs. Be sure your agents have a central dashboard that lets them connect with the customer regardless of the channel they use.

4 Lead with intelligent communications.

With so many channels and multiple touchpoints, it's common to lose track of individual communications. Thankfully, innovations in artificial intelligence (AI) are being deployed to deliver context to every conversation. With advanced analytics and machine learning gathering, deciphering, and sharing customer intent in real-time, both virtual and human agents can better anticipate customer needs and have engagements that will lead to desired outcomes. These technologies are multi-faceted and evolving fast, so be sure to design with this in mind.

5 Design for flexibility and scale.

Think agility, speed, and innovation. Whether you choose to layer cloud-based communication software on top of your existing system or decide to completely re-engineer your platform, the cloud will provide a cost-effective and scalable approach. For the flexibility and the speed you need to keep up with customer demand, choose a provider that you can entrust your data to. Look for one that has a reliable global carrier network, is completely secure, and complies with changing regulations. Choose a provider that is continually innovating so you can focus on your customer experience.



ANSWERING THE CALL

Your Complete Customer Engagement Solution

Swapping out technologies and changing a culture may seem ominous, but many businesses have successfully made the leap and aren't looking back. They are more agile, connected, and responsive. And that translates to real value. According to a 2018 [Forrester Total Economic Impact study](#) of enterprise companies that have turned to Twilio to power their digital transformation, benefits have included significant costs savings, increased conversions, and improved developer and agent productivity. Forrester concluded that the three-year financial impact of switching to Twilio brings customers \$12.6 million in benefits versus costs of \$3.3 million, resulting in a net present value (NPV) of \$9.2 million and an ROI of 277%.

Twilio Flex is a programmable contact center platform that allows you to easily develop, customize, and manage your customer communications. Built on Twilio's global infrastructure, Flex is reliable, flexible, and scalable. Best of all, you can provide your employees with a single customizable interface with the tools, intelligence, and agility they need to anticipate and exceed customer expectations during their entire lifecycle.

Ready to engage?

[Learn how Twilio can help you reinvent your customer experience.](#)

[Talk to us](#)



In a recent Market Trends report, Gartner projected that “by 2020, 30% of enterprises will embed communications into digital processes using APIs and modules from cPaaS vendors, up from less than 5% in 2017.”

Gartner, Market Trends: Using Communications Platform as a Service to Drive Digital Business Success, 29 January 2018



Common Terms: Back of Book Bonus

If you are considering making the move to the cloud, here are some important terms you should know.

API, also known as Application Programming Interface, is provided by a service or program so that others may use the features and functions of the system. APIs are like a contract that describes how a consumer will make requests of the system, and what they will receive in return.

Artificial intelligence (AI) is the ability of computer systems to perform tasks that normally require human cognitive skills, such as learning and understanding.

Attribute-based and omnichannel routing enables businesses to route tasks from all communication channels to the most qualified available agents, based on defined attributes.

Call tracking allows businesses to track phone leads by giving unique phone numbers to advertising, targeted landing pages, pay-per-click campaigns, and SEO keywords.

Click-to-call is a form of web-based communication in which a person clicks an object (e.g., button, image, or text) to request an immediate connection with an agent via phone call. Marketers are taking advantage of this to track leads and improve conversion.

Contextual analysis is an analysis of content (in whatever medium) that helps identify trends and topics within unstructured data, including documents, social media, email, and other text files.



Conversational assistants are infusing the latest AI, natural language processing, and voice recognition software within IVRs and other self-help tools to enable them to interact with customers in a more natural, human way.

Distributed software layer refers to a cloud provider having already negotiated contracts with carriers, set up networking interconnections, and built algorithms for routing, monitoring, and failover.

DTMF, or Dual-Tone Multi-Frequency tones, are in-band telecommunications signals sent over voice frequencies. Commonly used over telephone lines, DTMF tones are also commonly called Touch Tones.

Elasticity is the ability to scale up and down, responding to changing needs without penalty. Use what you need, when you need it.

Global reach is a term often linked to a cloud provider who offers a global carrier network, allowing businesses to buy and deploy on-demand phone numbers from around the world, thus eliminating the need for businesses to negotiate with carriers in every country.

IVR, short for Interactive Voice Response System, is an automated telephony system that interacts with human callers through the use of voice and touch-tone keypad selections (DTMF tones). You can create greetings, build menus, and easily customize your IVR using common web languages.

Live chat appears in a web browser or in mobile applications like an instant message system, usually via a small pop-up module through which a visitor can have a written conversation with a live operator in real-time.



MMS, short for Multimedia Messaging Service, is a standard way to send multimedia such as pictures, videos, and other attachments over text messaging channels.

Omnichannel. The literal translation of “omni” is “all,” so omnichannel refers to all channels. An omnichannel contact center isn’t necessarily operating on all possible channels of communication that exist (in today’s technology landscape, these are constantly changing), but it means that all of the channels it does operate are connected and integrated for a seamless customer experience.

RCS, short for Rich Communications Services, upgrades carrier messaging with features like sharing high-resolution photos and videos, adding appointments to a calendar, mapping directions to a business, browsing a carousel of products, sharing location, and more. RCS combines the messaging features consumers expect from popular messaging apps like WhatsApp and Facebook Messenger with the ubiquity of SMS.

Scale is in reference to the ability to expand usage needs on-demand, without additional time or expense to update hardware.

SDK, short for software development kit, is a downloadable software package that contains the tools you need to build on a platform.

Sentiment analysis, or opinion mining, is the process of determining whether language reflects positive, negative, or neutral sentiment. Using sentiment algorithms, developers and brand managers can gain insights into customer opinions about a topic.



SIP trunking service provides a virtual version of an analog phone line, eliminating the physical connection to a phone company. Using SIP trunks, a SIP provider can connect multiple channels to a PBX, allowing for instant provisioning of global voice connectivity using Voice over IP (VoIP) infrastructure.

SMS stands for Short Message Service and is another name for a text message. An SMS is generally sent from one mobile device to another over the cellular network.

Uptime is the amount of time your provider can offer a highly reliable, quality connection wherever it's located in the world; an ideal uptime exceeds a 99.95% SLA.

Visual builder is a drag-and-drop interface that allows a person to adjust user experiences visually, without needing to code.

Voice proxy, also known as “masked calling,” refers to the technique used to protect users’ private information by providing an intermediary number so that neither party can see the other’s true phone number for voice calls or SMS.

Web interface, using WebRTC, enables your agents to make or receive calls directly from a browser or CRM. This lets you gradually add additional contact center agents in new regions without capital expense or local hardware deployment; just plug them right in.

WebRTC, short for Web Real-Time Communication, is a collection of communications protocols and APIs that enable real-time voice and video communication over peer-to-peer connections.

Thanks for reading.

Would you like to learn
more about what Twilio
can do for your business?

[Talk to us](#)



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