

THE AGILITY PLAYBOOK

How retailers can score a competitive advantage in CX



Staying at the top of the game as a retailer is no easy task. It takes constant vigilance, a willingness to discard outdated tactics, and becoming comfortable with change. In other words, it means developing an agility mindset—the ability to spot changing trends and then pivot on the fly to remain one step ahead of competitors.

History is replete with once-successful retailers who were unable to keep up with the rapid pace of innovation or who were blindsided by unanticipated market challenges, from swiftly changing consumer preferences to disruptive global pandemics.

Business agility for manufacturers requires three key elements:

1. Making it easier to hear from your customers

2. Building teams that can stay productive during times of change

3. Investing in flexible technology that supports the company's customer experience goals

To better understand how organizations are integrating business agility into their company strategy, Zendesk surveyed 3,900 customers and 3,900 customer experience and customer service leaders, managers, and agents. The research team also analyzed top-agility capability data from more than 90,000 companies using Zendesk across 175 countries.

Train for agility, deliver better CX

Whether a retailer has just vaulted into the mid-market segment, expects to cross the threshold into the enterprise space, or has been a market leader for many years, it's challenging to build on previous wins from past customer experience strategies.

Retailers need to not only understand what customers want and they must have a plan for responding to emerging customer experience and service trends.

D1 Understand the customer to unlock new growth opportunities

Mid-market and enterprise retailers know how important customer service is to the business, and how critical it is to understand the needs of the end-consumer.

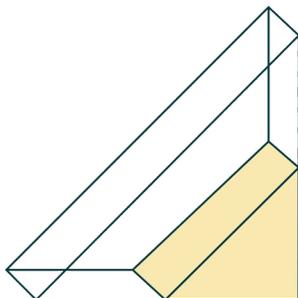
Truly listening to what customers are saying is the only way to know whether the retailer is providing gold-medal service. Customer feedback is one of the most important barometers for a company, signaling shifting preference and even new market opportunities. The rest of this playbook outlines some ways retailers can help ensure the voice of the customer is being heard throughout the organization.

Create reliable methods for hearing what customers want you to know—and offer choices throughout the customer journey

Leading retailers have known for years that customers want options when it comes to customer service. Giving customers choices may mean offering customers the ability to switch channels without having to repeat information or providing multiple ways to contact the brand. In fact, approximately 78 percent of agents at retail companies say they use more than one channel to communicate with customers during a given day.

32%

Only 32% of enterprise companies offer three or more channels to their customers.



Still, just 34 percent of mid-market companies offer three or more channels to their customers, and that number drops to 32 percent for enterprise organizations. The majority of retailers are missing valuable opportunities to hear from customers, and are likely frustrating customers even before they connect with a support agent.

Customer service channels aren't the only ways to hear from customers, as surveys and self-service can also prove to be valuable tools. Integrating online surveys into the entire customer journey, via partners like [Qualtrics](#), [Stella Connect](#) by Medallia, or [SurveyMonkey](#), for instance, can help retailers collect feedback throughout the customer experience. Also, self-service is an important window into the customer world. Keeping the help center up-to-date is a simple and effective way to identify and address consumer questions.

Make sense of it all with comprehensive analytics

For retailers with tens of thousands of customers—or millions—opening the information floodgates isn't enough. Without the right tools, these data points are disconnected snapshots in time, resulting in only a partial view of the customer journey. Without insight into real-time trends, it's next to impossible to get a sense of where the retail business needs to go.

Beyond identifying trends in tickets, retailers will want to examine how customers use and purchase products or services. Would a concerted push toward self-service make sense for the business? Does the organization need to shift agents to different channels or hire more employees? Answers to these questions will send business leaders along very different paths, and retailers should be thoughtful about choosing the strategy that makes the most sense for the brand and its goals.

Boost profitability by integrating CX data across the business

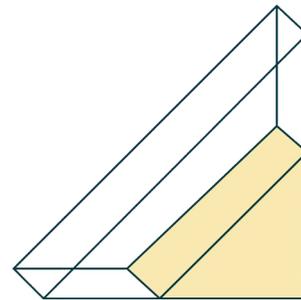
Data collected from customer experience touchpoints can help support teams provide better service; however, keeping CX data siloed in disparate teams is a lost opportunity. Customer feedback and related data should be shared across the organization, from product managers to marketers. CX data can fuel informed, [data-driven decision-making](#) that can boost customer acquisition and loyalty, as well as profitability for a business.

Focus on the entire experience with a complete picture of the customer

Retailers may have reams of customer experience data, but if the data is fragmented or incomplete, it cannot inform business decisions. Retailers should ensure agents have a complete view of the customer, including every interaction and detail, resulting in better outcomes for not only customers but for the company.

37%

37% of agents at mid-market companies say they need more customer context to provide better customer experiences.



CX data is more than just surveys

Here are some examples of CX data that can help agents, admins, and retail business leaders drive the best customer experiences:

- **Customer data:** purchase history, customer service history, billing information, social media data, loyalty programs, service-level agreements, third-party behavioral data
- **Business data:** inventory management, supply chain, and delivery data

02

Lower costs by working better— and smarter

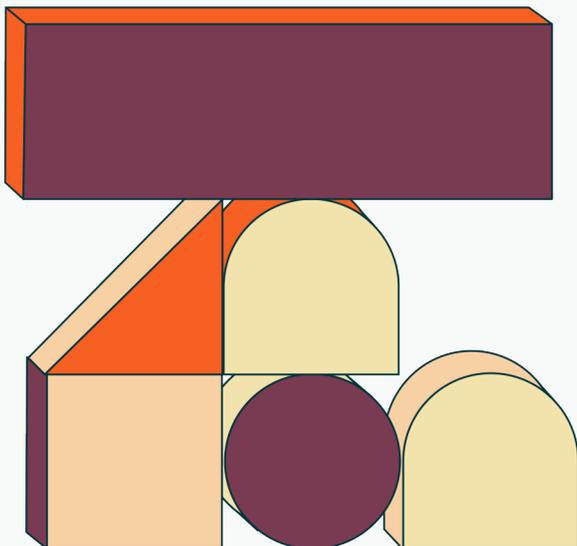
It's also important to focus on improving how the support operation works, even if incremental change proves to be difficult. It is not surprising that 95 percent of retail leaders report that making changes to customer service is challenging.

Although challenging, helping support teams work smarter is worth the effort. Improvements to support operations result in increased customer satisfaction, improved employee engagement, reduced costs, and even increased revenue.

Create standards and processes that drive collaboration and knowledge sharing

While CX integrations with partners like [Zoom](#), [Atlassian](#), and [Slack](#) saved the day when we suddenly shifted to remote work, collaboration remains a trouble spot for all businesses. Consider this: 90 percent of leaders report that their solution makes it easy for agents to contribute to their knowledge base, yet agents tell a different story.

Change is hard, but high-performing mid-market businesses are 1.5x more likely to adopt digital improvements and set themselves up to scale.



Only 57 percent say they can conveniently discover knowledge base articles. Giving agents all of these tools in one, easy-to-use dashboard makes collaboration and knowledge sharing much simpler to achieve.

High-performing mid-market companies are 1.5 times more likely to adopt digital improvements that make these changes a reality. Creating an environment that facilitates open collaboration and knowledge sharing is a powerful way to improve team efficiency.

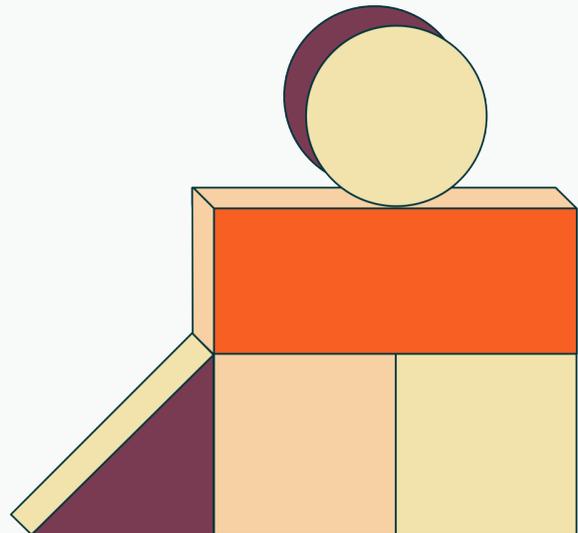
For example, if an agent solves a tough problem for a customer, documenting and sharing the steps they took can save other agents a lot of heartaches and get customers the answers they need faster.

Use automation to help eliminate redundant tasks and lower change management costs

Nothing kills team efficiency and morale like using people's power for work that could be automated. Every routine task that can be taken off an agent's plate means more time can be devoted to solving complex customer issues. For example, retailers can integrate automation through intelligent ticket routing or automated email responses to commonly asked questions.

Build out workflows to increase quality, transparency, and control

Put the flow into workflow: with simple business rules, companies can standardize processes and help the entire organization move in lockstep. Workflows can help ensure consistent execution--and likely faster, better customer experiences as a result. Workflows also make large-scale changes easier while avoiding the need to retrain the customer service team.

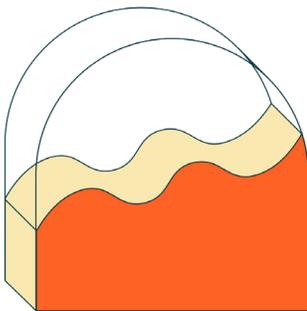


Constantly learn and adapt by powering smarter business with AI and machine learning tools

CX tools can automate steps across the entire customer journey, making agents more productive and self-service more accessible. With AI-powered chatbots, for example, companies can take advantage of always-on support and respond to customer questions even when agents aren't in the office. If a handoff is needed, bots can get their human counterparts quickly up to speed with key context to make problem-solving faster and more efficient. Bots are more widely accepted among customers, too; 42 percent of customers say they're open to working with a bot, with bots becoming increasingly popular among customers under 40.

44%

Only 44% of enterprise companies report using bots in their day-to-day work, compared to 51% of mid-market businesses.



03

Choosing the right technology to improve the bottom line

Prioritizing agile CX can improve the bottom line; 22 percent of business leaders report that being highly agile reduced their costs by 25 percent or more; another 38 percent of business leaders report cost savings between 11 and 25 percent.

Leading companies are 5.8x more likely to say they give agents a single view of important customer context.



Nearly a quarter of business leaders report that having high agility reduced their costs by 25% or more.

When business leaders are looking to invest in their customer experience, technology is a good place to start. As mentioned, providing a single unified workspace for agents plays a significant role in improving team productivity by giving agents a more complete view of the customers they're trying to serve. Leading companies are 5.8 times more likely to say they give agents a single view of important customer context.

Agile companies prioritize technology that is open, flexible, and integrates seamlessly with other platforms.

Empower the team to move quickly and adopt low-code tools

The days of on-premise software, which requires significant onsite support, are on the decline. More agile, flexible CX teams lean on low-code tools that don't require significant upkeep or complicated onboarding. Setting up workflows, conditions, and triggers within a CX platform shouldn't require IT or a developer's assistance. Retailers can integrate with parents like [Workato](#) or [Domo](#) to add to the seamless agent experience.

Open technology is a retailer's friend

Flexible technology is more likely to be customized, now and in the future, to suit the company's needs. If the retailer is lucky to have in-house developers, any new technologies should play nicely with their preferred tools and development languages.

Integrate frequently-used apps and key partners

No retail company or team relies on just one piece of technology or one solution to support the customer experience. Whether it's enterprise resource planning, warranty management software, or a CRM, retailers need customer support software that integrates easily with whichever technology their team requires.

Consider speed to market, usability, and scalability for tech investments

When ticket volumes increase, the top performers typically adopt three sets of features compared to low-performing competitors: help center articles, macros, and groups and automations. When identifying a CX tool to use, retailers should consider whether the technology stack is designed to grow with the business, can easily support added functionality, and, ultimately, whether the platform will actually help the team provide better customer service.



Retailers saw a 21% ticket volume increase versus Q1 2020.

Conclusion

Stay consistent and deliberate about listening to customers, streamlining teams and processes, and taking a disciplined approach to technology decisions, to make CX agility a way of life.

Ready to take your agility training to the next level?

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Zendesk partnered with Dynata, a first-party data and insights platform, to conduct the market research cited in this playbook.