



# Transforming Customer Experience: How Companies Drive Business Success When Integrating UC & Contact Center Platforms





# Table of Contents

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<b>How Important is Customer Experience? Very.</b>	<b>03</b>
<b>CX Transformations Add Technology, Integrations - and Budget</b>	<b>04</b>
<b>UC/Contact Center Integration Delivers Value</b>	<b>05</b>
<b>Integrated Platforms Drive Better Business Metrics</b>	<b>07</b>
<b>New Interaction Channels Include Visual Engagement</b>	<b>08</b>
<b>Visual Engagement Improves Customer Interactions</b>	<b>09</b>
<b>Video Helps Drive Business Metrics</b>	<b>10</b>
<b>What Should You Do Next?</b>	<b>12</b>

# How Important is Customer Experience? Very.

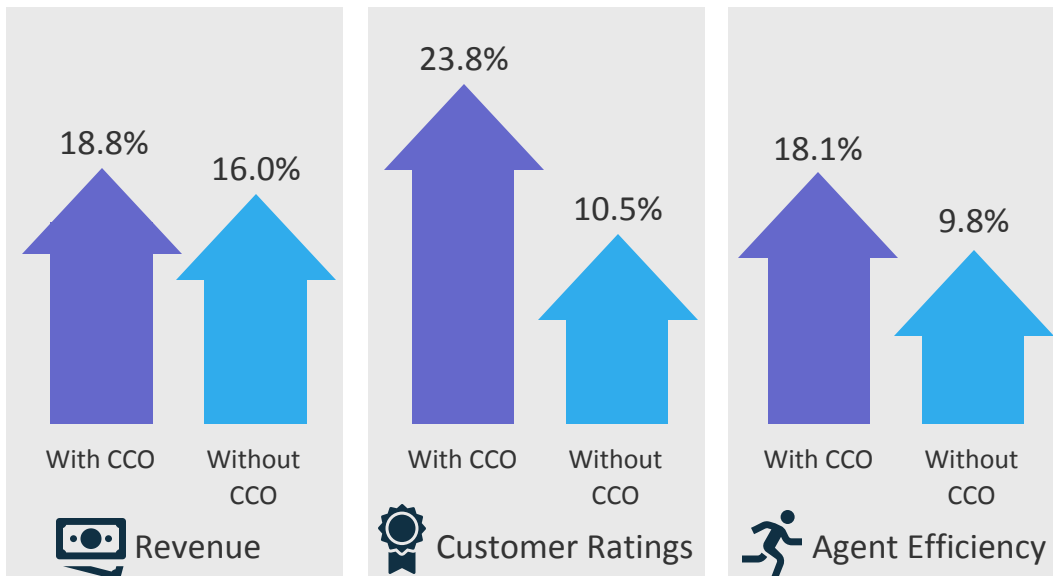
Regardless of the metric, delivering an excellent customer experience is at the top of business leaders' priority lists.

When asked for 2023 technology spending plans, 65% of companies said they were increasing CX spending in 2023 (the highest of any technology area), by an average of 23%, according to *Metrigy's 2023 Technology Spending Forecast*. And for three straight years, the majority of IT and CX leaders placed "customer satisfaction" as their top business priority, ahead of product and service quality, information security, and generating revenue, among other priorities.

Further underscoring business focus on customer experience, nearly three-quarters of companies have hired or are planning to hire a Chief Customer Officer (CCO), and eight in 10 say their CCOs are either fully or somewhat empowered to take action to improve CX. When companies have a CCO, they leverage technology and measure its success on revenue, customer satisfaction, employee efficiency, and operational costs. Those with CCOs report better success metrics across the board, as is shown below.

## CCO Results in Measurable Success

Companies that use agent assist, with and without a CCO



## CCO Definition:

Executive-level individual with ultimate responsibility for all customer-facing activities and strategy to maximize customer acquisition, retention, and satisfaction.

Often works closely with CMO and head of sales. Creates "customer-first" mentality across the organization, in large part through analyzing data of customer ratings, sales, sales through digital channels, etc.

# CX Transformations Add Technology, Integrations—and Budget

The aforementioned importance of CX explains why companies are spending an average of **4.2% of their revenue** on CX technologies (up from 3% in 2021) and an average of \$2,513 per employee.\* By investing in technology, organizations improve agent and customer experiences through automation and contextual knowledge. Artificial intelligence, analytics, workforce optimization, and digital channels are just a few of the metric-enhancing technologies companies are adding to their portfolios.

In 2023, 82.7% of companies will have completed a CX transformation initiative or have one underway. Which projects are leading the way with CX transformations? Here are a few highlights:

## Worker-focused initiatives:

54.1%

are improving agent scheduling and capacity planning, while 52.6% are adding or improving workforce optimization suites.

## Applications and channels:

41.2%

are adopting virtual assistants/chatbots, and another 41.0% says their CX transformation project involves generative AI. Right behind are 39.9% of companies that are adding visual engagement (video, screen-sharing, and co-browsing) to their portfolios.

## Foundational technologies:

48.1%

are building a stronger founding by integrating contact center with UC, CRM, and other platforms, while 46.3% are adding management tools to improve network, audio, or video performance. And 40.3% are adding cloud-based applications to on-premises platforms, while 31.5% are moving off on-premises and to the cloud.

The technology transformation focus is imperative to the success of the new workplace, particularly given 35.2% of organizations plan to continue with a work-from-home model for their contact center employees, with 61.8% working from home full-time.

\*All data on this page is from Metrigy's CX Optimization: 2023-24 research study.

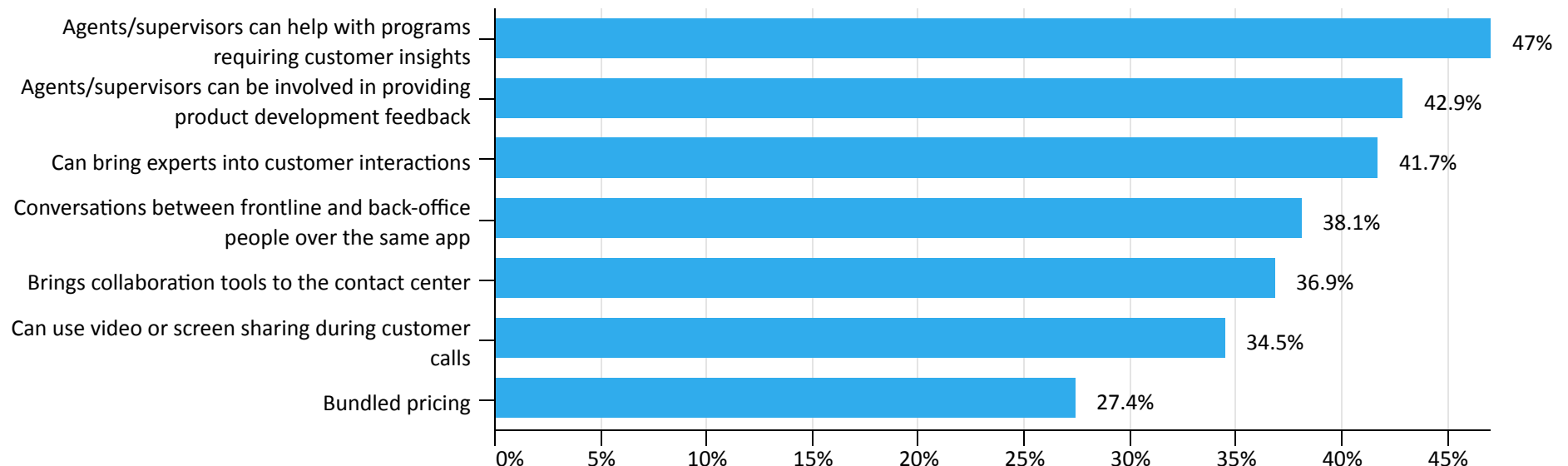
# UC/Contact Center Integration Delivers Value

As organizations prioritize CX investment, leadership, and transformation projects, they also are evaluating projects to improve employee efficiency and make customer journeys more seamless. One area of focus is the integration of Unified Communications (UC) and contact center platforms. Siloed communications introduce friction, whether within customer or employee interaction channels.

Integrating UC with an omnichannel contact center delivers significant benefits, including the ability to integrate video into customer service portals; use a common communications platform for all employees; and include contact center experts in team workspaces to collaborate on product development or marketing plans.

In North America, 54.2% of organizations had integrated their UC and contact center platforms to some extent by the end of 2022.\* They found value in integrating these platforms in a variety of ways:

## What value do you find in integrating your contact center with UC?



\*Metrigy's Customer Experience Transformation 2023-24 research study

# UC/Contact Center Integration Delivers Value

Not all use the same cloud platform provider for both UC and contact center, but it is the most common approach (50.4% are doing this globally today, with another 26.2% planning for 2023). The value it delivers includes:



**Cost savings through  
bundled licensing**



**Employee productivity  
improvements with a  
common user interface**



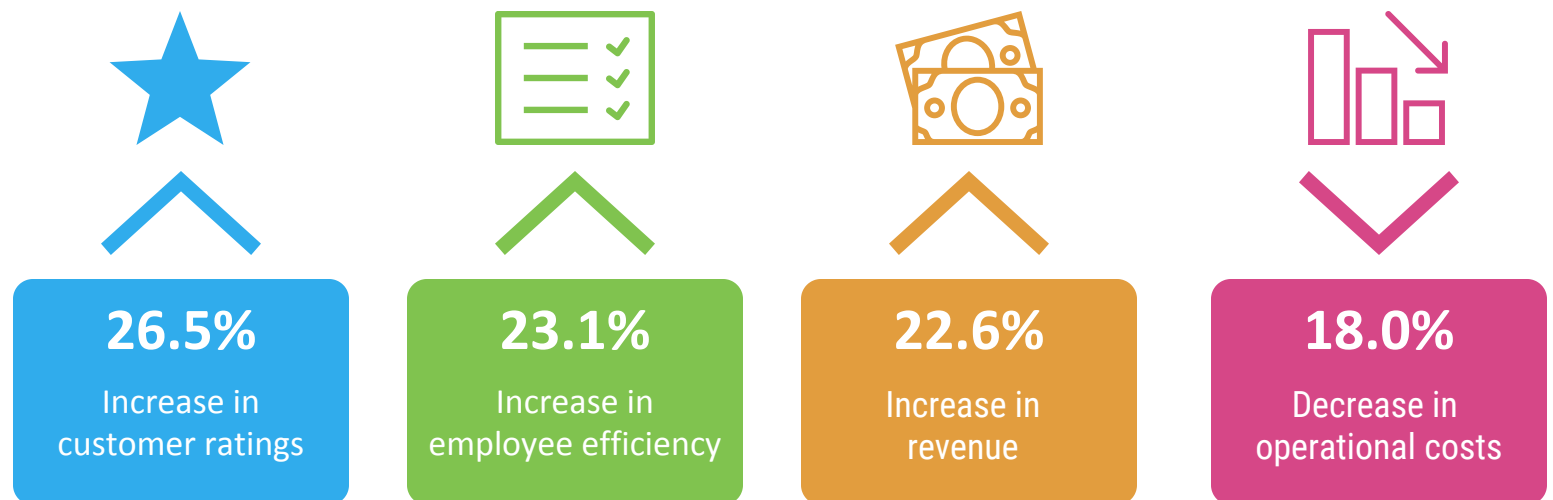
**Ease of application  
integration if the provider  
uses the same back-end  
for both platforms**

# Integrated Platforms Drive Better Business Metrics

As with any technology decision, there should be measurable business success to validate the technology. After all, deploying technology just because it's "cool" won't help customer satisfaction—or the bottom line. We asked companies how their key business metrics changed before and after integrating the platforms. Metrics evaluated include:

- **Customer ratings** – Satisfaction improves with the ability to escalate to a video or screen-sharing call, or to speak to an expert who the agent quickly loops into a call using the integrated platforms
- **Agent productivity** – Productivity rises with the ability to use collaboration tools and presence status to reach non-contact-center experts for help in resolving an issue more quickly
- **Revenue** – Reaching an expert to address a crucial question closes more sales; what's more, when customers are happy with their interaction, companies see more referrals and repeat business
- **Operational costs** – Integrated platforms, particularly with the same provider, generate cost reduction through bundled licenses and reduced training costs. (Integrated platforms with separate providers also can generate savings by not having to change providers, while still realizing the benefits of integration)

Our research success group saw impressive results with integrated platforms:

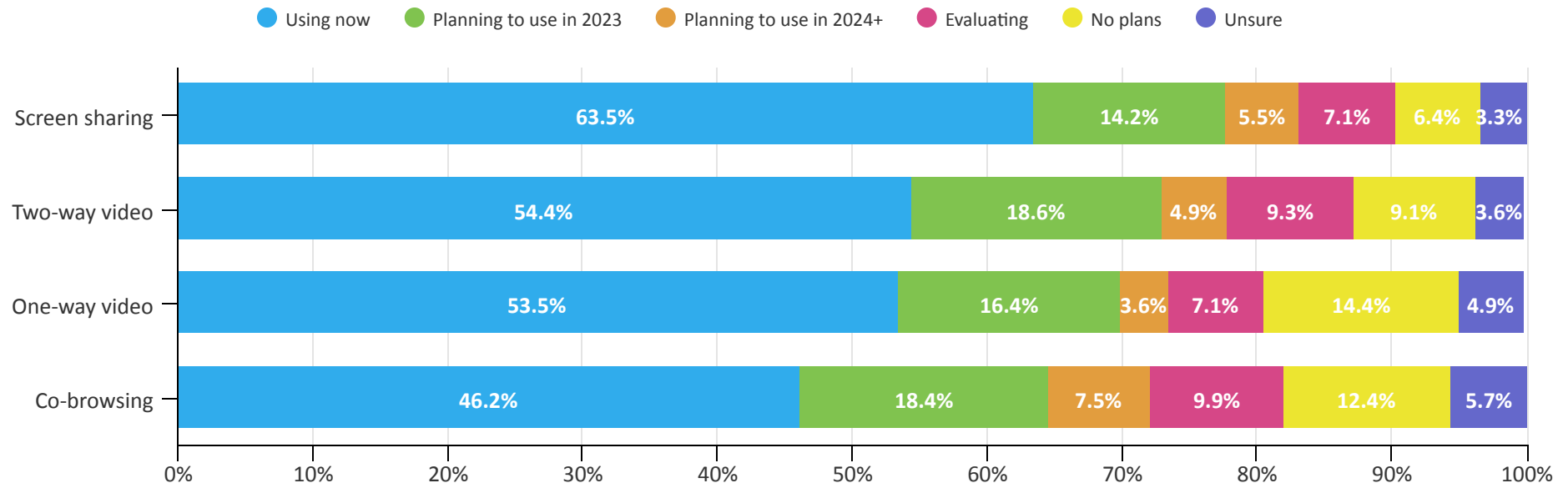


# New Interaction Channels Include Visual Engagement

CX leaders are adding interaction channels to reach customers where they are at any given time and to match generational preferences. Voice and email remain prevalent channels. Customers increasingly have the choice to use visual engagement channels, which include screen sharing, co-browsing, and video. A total of 53% of companies globally plan to have visual engagement in place by the end of 2023, with screen-sharing most widely used right now, followed by two-way video.

They also are adding more digital channels, including mobile business messaging services, such as Facebook Messenger, WeChat, WhatsApp, etc.; in-app messaging for customers visiting business apps from their mobile devices; and webchat for text interactions while visiting a business website. And finally, they are adding conversational AI and self-service capabilities for those who can solve their issue without the need for a live agent.

### Visual Engagement Application Adoption





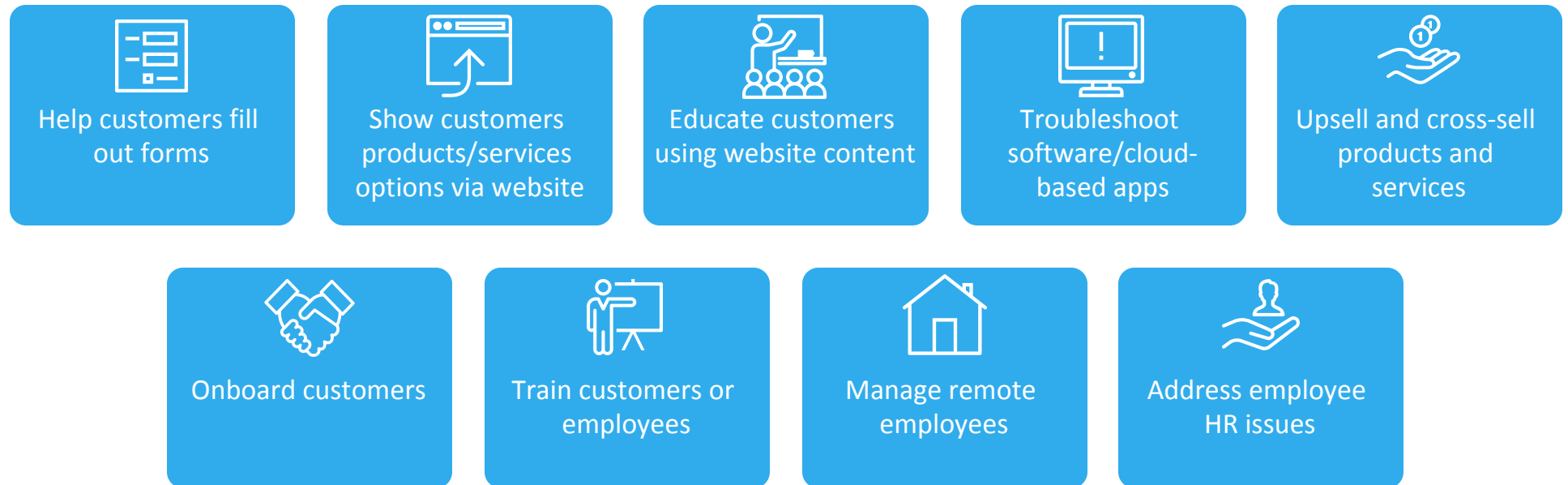
# Visual Engagement Improves Customer Interactions

Visual engagement has been steadily growing as a customer interaction channel. After all, we use video and/or screen sharing for most business and personal calls. Why not do the same with those we do business with? Customers see value in being able to “show” the agent what the problem is—whether it’s a computer app, a problem with an appliance installation, or the damage from a car accident. During a discussion about investments or healthcare, for example, customers have a level of comfort being able to see the person with whom they are discussing sensitive financial issues.

Zoom is the most frequently cited visual engagement provider in *Metrigy's Customer Experience MetriCast 2023 market study*, and it’s also the top provider under consideration among those switching providers. When it comes to video, specifically, 65% of organizations use their internal video or team collaboration solutions; most would prefer to have video integrated into their contact center platform.

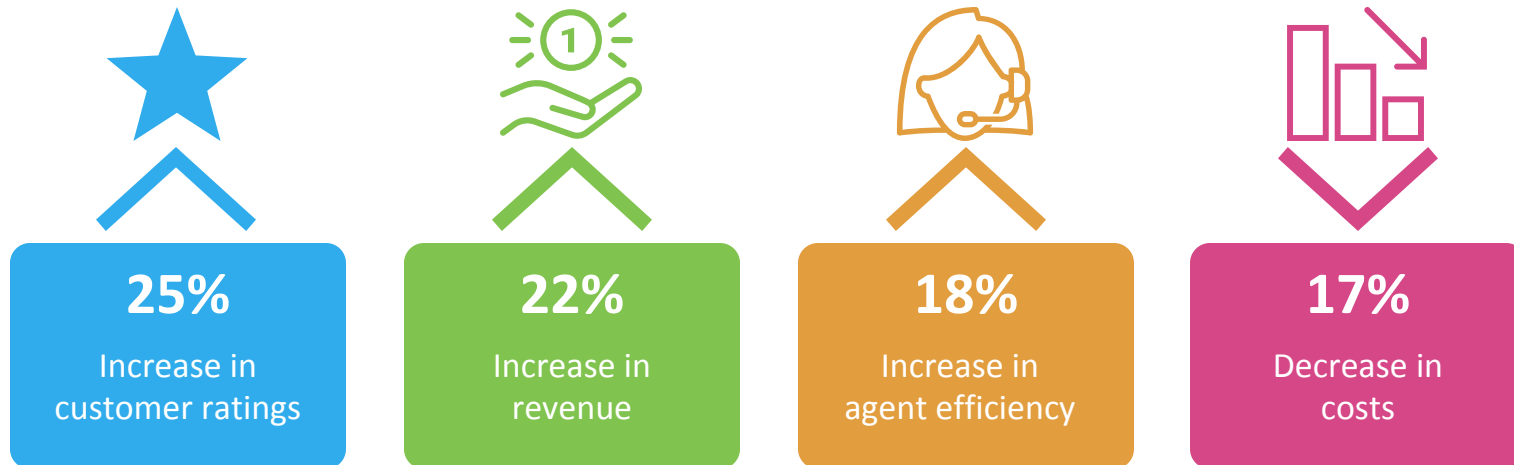
Visual engagement also reduces time spent on calls, ranging from 34% to 42%, depending on company size.

## How Companies Use Visual Engagement



# Video Helps Drive Business Metrics

CX leaders in the research success group report improved business metrics through the use of visual engagement applications in the following areas:



## How does visual engagement drive business metrics?

**Customer ratings increase for a few reasons:** Customers get resolution faster by showing the agent the problem via video (product assembly or installation) or screen sharing (software support issue); customers develop stronger relationships with trusted advisors (financial advisors, healthcare practitioners, educators) because they can see them on video, and perhaps also be viewing a shared screen.

**Revenue increases** because agents can show demonstrations on their screens, easy-to-understand pricing options between products or services, or upsell/cross-sell from a trusted advisor.

**Agent efficiency increases** because they can solve problems faster by seeing the problem vs. trying visualize it with a written or spoken description.

Even though there may be increased costs associated with the visual engagement application, **overall costs decrease** because of the efficiency generated by the technology. Also, in some cases, companies save toll charges when customers use web-based video vs. calling a toll-free number

# What Should You Do Next?

1



**Evaluate your CX strategy with a transformational lens.** What technologies can improve agent and/or customer experience and drive measurable business improvements? Jump on those and transform your customer interactions.

2



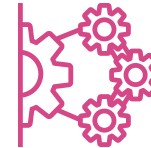
**UC/contact center integration may, in fact, be your transformation project**—or it may enable another one. If you haven't integrated UC and contact center platforms, consider doing so for improved employee functionality, reduced costs, and better customer satisfaction.

3



**Evaluate the needs in your organization.** As stated in this report, companies are finding technical and operational benefits with UC/CC integration. How do the benefits they're reporting align with your needs?

4



**Integrated platforms help contact center agents, all other employees, and customers.** One of the biggest benefits comes from the addition of video and screen-sharing. Evaluate how these applications—integrated with the AI, analytics, and automation capabilities that can greatly improve CX—will help improve your business metrics.

5



**Measure success!** Gather your baseline figures prior to integrating your platforms, and measure to see how much the integration improves revenue, customer ratings, employee efficiency, and operational costs.