One doesn’t need to engage in a formal project to assess retail customer experience. After all, we are all consumers and experience it on a frequent basis.

Self-service experience

Here’s what I recently experienced when I was shopping for my household.

<table>
<thead>
<tr>
<th>Search terms</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sofa with footrest</td>
<td>A few sofas with headrest</td>
</tr>
<tr>
<td>Wide toe walking shoes</td>
<td>Hits on intimate apparel, followed by hits on running shoes (no walking shoes presented)</td>
</tr>
<tr>
<td>Non-stick saucepan with no Teflon</td>
<td>Scores of hits on pans with Teflon</td>
</tr>
<tr>
<td>No-scent pain relief cream</td>
<td>No-sting pain relief cream</td>
</tr>
<tr>
<td>Dishwasher does not clean well</td>
<td>Pages of unrelated hits</td>
</tr>
</tbody>
</table>

With results like these, shoppers are forced to talk to an agent. And the agent has no clue what happened in your self-service interaction, asking you to repeat information, further exacerbating the shopper’s frustration!

Omnichannel service experience

A few weeks ago, I ordered a desk online from a leading office supply and furniture store. I noticed that the desk went on sale just a few hours after I ordered it. I cancelled the original order; the contact center agent confirmed this was done. The next morning, I received a notification that the product had been shipped. I called the retailer and told them I had already cancelled the order and did not want the product. I was told that it was too late to cancel. I called again and got some other agent online who said they would give me a reduced price if I accepted the product. Eventually, that was what I did, and I got the reduced price. While it was a semi-acceptable ending, the end-to-end experience was in no way enjoyable for me as a shopper.
**Consumer hurdles**

Despite repeated mentions of “omnichannel” and “digital transformation” on their websites and annual reports, retailers are still struggling in these areas. According to Forrester’s Retail CX Index for 2017, only a handful of individual brands saw their scores move in a statistically significant way, and all but one of those moves were down.

We set out to hear from “horses’ mouths” what hurdles consumers faced in getting customer service by surveying them directly. Here are our findings across all industries (respondents could pick up to two pain points):

- 41%: Different customer service agents give different answers
- 34%: Customer service agents don’t know the answer
- 31%: I can’t find an answer on the company’s website
- 17%: Other

We then surveyed contact center agents about their challenges in delivering service when customers are on the line. Not surprisingly, their hurdles mirrored those of consumers:

- Finding the right answers to customer questions: 26%
- Different systems/information sources give different answers: 25%
- Hopping from one application/window to another: 20%
- Hard to keep up with all the new information/changes I need to know about: 14%
- Other issues: 15%

**The biggest hurdles for both consumers and agents had to do with omnichannel knowledge management (KM) and guidance to consistent answers.** Ignore this critical enabler at your peril when you launch a CX initiative! Here are some best practices that can improve the odds of success in a KM initiative — and transform CX from miserable to memorable.

**Best practices**

**1. GO PARETO**

Smart knowledge is critical to answering shopper questions, as evidenced by the top three pain points in customer service. But it is important you don’t try to boil the ocean when you get started with a KM implementation. What we have seen work best is the application of the 80-20 Pareto principle: start by developing simple and effective answers to the most frequently asked questions. You can get a sense of what these FAQs are from your customer service organization and website search data.

**2. TAME THE CHAOS**

The proliferation of retail touchpoints means that today’s shopper is more omnichannel than ever. Go with a unified, omnichannel KM platform rather than implementing point KM
products for interaction channels. A recent disturbing trend is the deployment of siloed chatbots that are not integrated with other touchpoints from a KM, context, or analytical perspective. In fact, this was the biggest consumer complaint about chatbots in a recent survey by Chatbots.org. The siloed approach creates knowledge chaos in the organization and mass shopper defections.

3. LEVERAGE AI

Artificial intelligence can be used to help both shoppers and customer service reps. Leverage AI-based reasoning to provide step-by-step guidance to answers, offer purchase advice for complex customer questions, or guide agents through service processes such as product returns. Our clients have been applying AI for customer service in three ways:

1. Virtual assistants (for queries of low to medium complexity)
2. Reasoning (for queries of medium to high complexity)
3. AI-guided search and process

How does this work in the real world? Here are some examples:

- A leading windows manufacturing client and retailer uses AI reasoning for conversational self-service, where consumers get guided to answers through a dialog
- A top cosmetics manufacturing client and retailer uses virtual assistant and other tools to answer questions from their worldwide sales team while educating them on best practices
- A leading household appliances manufacturer and retailer uses AI reasoning to provide conversational customer service to consumers across 24 European countries

Even when customers are on hold for the interactive voice response (IVR) system, or when they are about to escalate an issue to human-assisted touchpoints like chat, email, or phone, contextual knowledge and AI guidance can be offered proactively with the promise that the customer will not lose their place in the queue. Such deflection at the point of escalation is a win-win for the customer and the business.

4. MAKE ESCALATION SEAMLESS

When self-service fails, shoppers need to be transitioned to human-assisted service without loss of context, where they don’t have to repeat answers to questions they had already answered through self-service. And the answers should be consistent regardless of touchpoint, which underscores the need for a unified omnichannel knowledge base.

5. USE HUMANS TO BOOST SHOPPER SELF-SERVICE

You can boost confidence in and adoption of self-service by using cobrowse technology. In it, the shopper and agent share the same screen, and customers learn how to use self-service “the next time around.” In fact, cobrowse can also be used to help shoppers navigate the retailer’s own website or third-party sites, and complete their transactions, whether buying a product or collaboratively filling an online form.
6. OPTIMIZE KNOWLEDGE

Use knowledge analytics to identify what’s working and what’s not working in the knowledge base, and modify the scope and content of knowledge, as needed.

7. DE-RISK INNOVATION

Insist that your solution partners agree to de-risk customer service innovation by asking for a free production pilot with no-charge guidance to success during that period, and with no obligation to buy at the end. This ensures a shared vision for success and a true partnership arrangement.

**Final word**

Delivering customer service without omnichannel knowledge and AI guidance is a surefire way to fail in CX. On the flip side, proven best practices can catapult you to the top in CX. See you at the top this year and the next!

**About eGain**

eGain customer engagement solutions power digital transformation for leading brands. Our top-rated cloud applications for social, mobile, web, and contact centers help clients deliver connected customer journeys in an omnichannel world. To find out more about eGain, visit [http://www.egain.com/](http://www.egain.com/).