E-BOOK

SMALL STEPS TO CREATE BIG CX/MX DIGITAL GAINS:

An Agile Approach.

SILVERTECH

Small steps to big CX – an agile approach.

Improving customer experience (CX) has always been a top priority for marketers. Without a doubt, customers are choosing to work with brands that deliver the best experiences which resets the bar for everyone else. For businesses that are expected to offer 'world-class' experiences but have less than a 'world-class' budget, that can be extremely daunting.

The issue we often see is that many companies feel almost paralyzed because they either don't know where to start or they fear that getting from where they are today to where they want to be will require a major undertaking. There are lots of moving parts, complicated technology problems to solve and internal battles that, let's face it, can drag on depending upon the level of executive buy-in.

CX improvements **do not** have to be over-whelming, time consuming or expensive.

But it doesn't have to be that way! There are major customer experience improvements you can make that aren't time consuming or expensive. As a bonus, while you are prioritizing and implementing small wins in CX that can be made quickly, you can be conducting tests and gathering insights to learn more about your customers and their needs. As you focus on continuous implementation of low hanging fruit, analysis and iteration, you will be gaining CX results and loyal customers. At the same time, and while you are enjoying positive impact from immediate changes, you can be doing longer-term planning, making technology decisions and gaining organizational alignment.

SILVERTECH

We recommend an agile-like approach to CX called

Crawl.

- Assess current state and develop persona attributes
- Identify top conversion paths
- Optimize lead generating pages/forms
- Update navigation labels and content to be customer-centric

Walk.

- Create strategic CX roadmap based on customer benefits/outcomes
- Audit technology capabilities versus needs
- Modernize website on scaleable, flexible platform
- Begin integrations of intersecting systems that support tailored audience strategy

Run.

- Implement personalization features
- Add automation and artificial intelligence to extend and support customer needs
- Leverage first, second & third party data as part of your one-to-one strategy
- Obtain feedback from user testing, focus groups, and surveys
- Gather insights, update your CX roadmap, and keep going!

Crawl • Walk • Run

Crawl.

01

Assess your starting point.

Take a dive into your analytics, size yourself up against your competitors, benchmark existing KPIs, gather any customer or marketing data in your possession, and start deriving a picture of your starting point. You don't need to spend a lot of time here. No glossy reports or slick presentations need to be developed. But you will need your starting point as you plot progress.
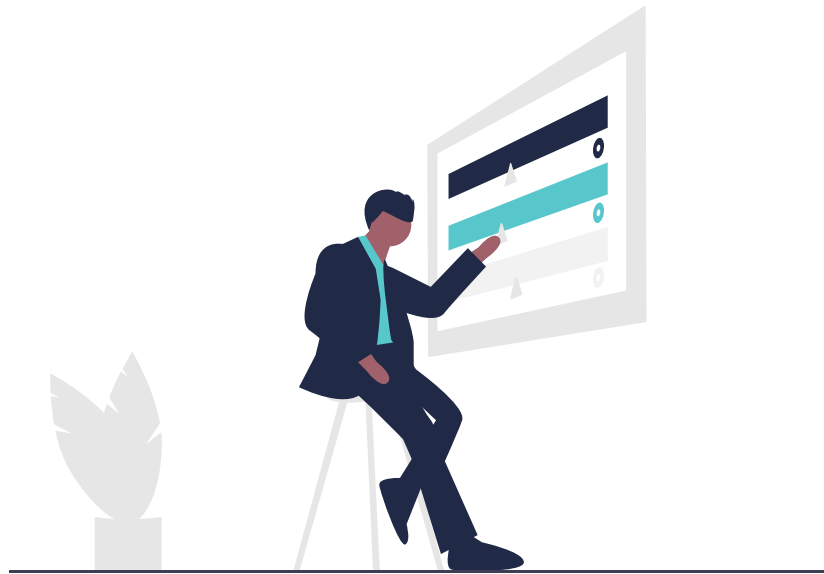
"You can't really know where you are going until you know where you have been."

- M. Angelou

Crawl.

02

Know the needs of your customers.

Use personas to 'put yourself in your customers' shoes'. If you don't have personas, we highly recommend creating them. Start with just 2 or 3 that represent your top ideal audience segments. Personas provide key insight into an audience segment's state of mind, motivations, habits, competencies, content needs and more. Customer journey maps are helpful in this process, but if you don't have them, don't let it slow you down. You can do them in the upcoming Walk Phase. The insights gained in personas and customer journey maps can be used for content and messaging across all communication channels.
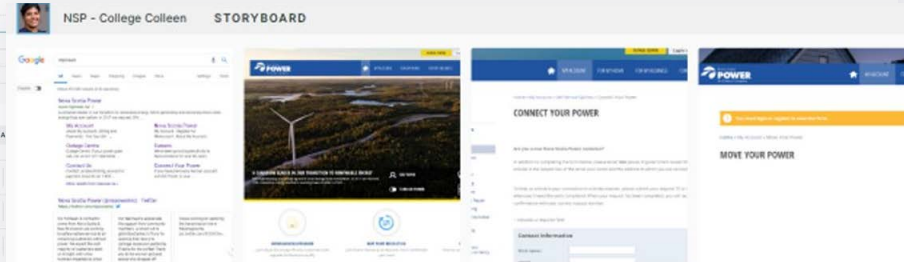

College Colleen

Crawl.

03

Identify pain points and problem areas.

With insights you derived from step one and two, jot down pain points that are obvious experience obstacles or issues. With your primary audience's most common web tasks or transactions in mind, identify and evaluate conversion points. Are there too many steps? Is it obvious what action you want users to take? Could they be getting 'stuck' or confused? Does the content provide what they need to make a decision? Make sure you are scrutinizing the experience on mobile as well. Jot down any obstacles you find.

Crawl.

04

Implement content and layout changes, track, test and iterate.

Select 1-3 pain points or obstacles that impact the most customers and then identify ways that you can help eliminate those by making changes to content, navigation or page layout. Use what you have learned about the needs of your customers to prioritize and create content. Usually these are quick and simple fixes you can make that do not require technology changes and/or executive approval.

As you launch these small improvements, you will be increasing customer satisfaction while working on longer-term planning; it gives you the breathing room to work on more complicated initiatives, while showing customers you care.

Moving the needle and driving a great digital customer experience doesn't have to require internal buy-in, crazy budgets, and a heavy reliance on IT. In fact, small incremental changes can bring more positive change than large and expensive initiatives due to faster time-to-market.

Crawl • **Walk** • Run

Walk. 🚶

Now that you have some 'low hanging fruit' changes made and working hard for you, it's time to look at the bigger picture for the longer term. It is at this point that we generally suggest developing a digital roadmap.

01

Develop a longer-term digital roadmap.

Since your primary goal is improving customer experience, consider developing a map that aligns your activities, channels, tasks and priorities to customer benefit outcomes.

So rather than align to functional outcomes, such as our website needs a new product selector widget, focus instead on customer outcome – our customers need a way to figure out which product is right for them. By doing that, you are forced to think with a 360-degree perspective to really make sure you are moving the needle to improving CX.

For example, you may need a website product selector widget, but you may also realize that live chat for those who want to ask further product questions and/or better visibility of products in the site navigation may also contribute to the intended customer outcome.

jetBlue Uber
amazon THE HOME DEPOT

2022
Personal & Predictive

"I have such a great relationship with my energy company. They cater to my individual needs in every interaction I have with them. I can rely on them to provide proactive guidance and expertise that helps me meet my family's goals, before I even realize what they are."

2022
Personalized & Proactive

2021
Personalized & Proactive

2020
Modern & Relevant

5 YEAR DIGITAL ROADMAP

Walk.

02

Assess technology needs and implement flexible platforms.

It is likely that to meet your customer experience needs, you will need to find a way to break down data silos and overcome legacy technology challenges within your organization. Customers want one, consistent and connected experience with you across all channels. That isn't easy for many organizations to do without updating to some modern technology and integrating it into their ecosystem. This is where many organizations really get 'stuck' and initiatives get stalled because these efforts can become expensive, resource-intensive, and time consuming. But they don't have to be.

The two non-transactional technology platforms that have the largest impact on customer experience are typically the Content Management System (CMS) and Customer Relationship Management System (CRM). Of course, if you conduct business online and have transactional systems such as ecommerce, online banking, online account management, etc., take a hard look at those as well.

It is very unlikely that you will be able to completely rip out all your old technology and start over. Most organizations don't have that luxury and we wouldn't recommend undertaking something like that all at once anyway. Ask yourself if you can extend or improve the capabilities of your current systems as a short-term goal. Identify one or two systems that could be 'core' replacement systems that could easily integrate with other systems.

Walk. 🚶

Our suggestion is to start with your web platform or CMS. If you have invested in a CMS in the past few years and it isn't performing, don't assume you need a new one without understanding why it isn't effective.

Sometimes, a poor implementation, poor training or the wrong initial guidance from the vendor could be the problem, and this can often be resolved. In that case, find a trustworthy, proactive, certified partner who can help you to identify and fix your current platform before determining you need a new one.

03
Optimize or upgrade your web experience and content management platform.

To prepare for a complete overhaul and optimization of your website experience, evaluate and compare platforms based on your current and future needs and goals.

Most modern CMS platforms will give you the functionality you need to meet your initial customer experience goals while also integrating or connecting with existing legacy technology or systems. Our team works with CMS market leaders such as Progress Sitefinity, Kentico, Akumina and Sitecore, as well as open source platform providers such as Drupal and WordPress, so there are many options out there. If you aren't sure where to start, check out How to Choose a CMS.

Walk.

04

Overhaul your website to be modern and relevant.

In the Crawl stage, we recommended that you identify a few highly visited conversion paths and optimize 'low hanging' fruit areas to gain improvements. At this stage, it would make sense to now do a more significant overhaul of your website. We suggest starting with the website because it tends to be the 'hub' of all your digital efforts and is usually the most important channel in the customer experience journey.

So what does it mean to overhaul? Use what you've learned about your customers in the Crawl phase to reorganize and restructure the site content and navigation to 100% meet customer needs. Do not focus on internal organizational preferences, lingo or content ownership. Lay out the site so that content not only resonates with your customers and prospects but also encourages them to take the next step in their decision-making process.

Launch a modern, customer-focused web experience.

Walk. 🚶

Include adequate help and tools to allow the customer to self-serve as they learn, compare, shop and validate your company's products and services. Again, make sure the mobile experience is a priority and consider other factors you will need to build in to continue building relationships with your customers. Also, consider data privacy standards, ADA compliance, robust search, FAQs and help features as necessities for a quality online experience.

Most modern CMS solutions will also allow you to track and study your web visitors in a way that allows you to understand them better. They help you to segment your users so that you can leverage these insights to begin marketing to your customers better. In the Run phase, you will see how you can even use features like personalization and lead scoring features within the CMS to automate these processes. Even if you aren't ready to take the automation plunge, these CMS solutions help to define your audience so that when you are ready, you have the data to back up your decisions.

Small attention to detail and a streamlined, thoughtful approach is what will distinguish your new, modern site from an outdated brochureware website.

Crawl • Walk • Run

Run.

Now that you know more about your audience and their needs, have your CX roadmap and have overhauled your website so that it is modern and relevant, you are ready to begin running toward one-to-one experiences with your customers.

That means that you are ready to start tailoring and personalizing the experience so that customers coming to your site will feel like you already know them and understand what they need next.

This phase demands more advanced strategies and may require some technology updates, but you can likely utilize most of what you already have. There are several ways you can begin to Run, and for these steps, it may be helpful to get help from a partner as they often require additional data integrations, third-party data, or the development of a secure, customer data platform. They also may require additional tools or features such as marketing automation tools, AI platforms, cross-domain analytics applications, etc. Depending on the CMS and other technology you

already have (such as if you already use tools like Hubspot or Marketing Cloud), it is possible to start dipping your toe into these areas by using big picture strategies at minimal additional cost.

Run. 🏃

01

Automation.

Depending upon your CX roadmap, automation could include anything from lead scoring to campaign workflows to artificial intelligence for predictive modeling. Think about what your customers would value from most and start there. If your customer would get the most value from consistent communications and/or promotion, leverage marketing automation. If your customers would value insights you can draw from your data or content and push to customers to provide education, consultation or guidance, focus on how artificial intelligence or analytical tools offering deep customer insights could help.

Even once you've identified what areas you want to automate, you may have to rollout implementation over time. Don't try to boil the ocean. Take a small step, test, measure, optimize and test again. Learn from lessons of the past to guide future rollouts.

Run.

02

Personalization.

Start with a strategy that prioritizes your most valuable customers – what steps and strategies can you take to ensure those customers get white glove or top-notch service that make them feel special? After that, prioritize your ideal prospects to provide them with personalized information relevant to their unique needs.

Make sure you consider what prospects are looking for and why they are coming to your site. You can do this by analyzing where they are coming from (what campaigns/channels), what ad/social post/email content they clicked on to get to your site, what stage of the buyers' journey they are in, etc. Once you have both sides of your lead-to-loyal customers optimized, start working additional segments from the outside toward the middle of the lifecycle spectrum.

Leverage your modern CMS, Marketing Automation and CRM platforms to help identify and deliver personalized content to users automatically. Many modern CMS platforms can use past browsing behavior or rules-based segmentation while the more advanced enterprise-level solutions can even use AI (artificial intelligence) to create predictive individual personalization models.

Run.

03

Leverage more data.

Although you will hopefully be leveraging the first-party data you collect while doing initial stage optimizations, consider utilizing second or third-party data to fuel your marketing and personalization efforts further in more advanced stages. Data privacy and security will be a concern here so just make sure you are adhering to GDPR, CCPA and other compliance measures that may be applicable.

Always provide your customers with an understanding of how and where you obtained the data you have on them for transparency. This level of data integration may also require technical expertise and a thoughtful data strategy, which is why we typically suggest adding this once you've optimized your site on an extendable core CMS platform.

Run.

04

Integrate More Systems.

Integrate with or build applications that connect to additional platforms such as ERP, CIS, marketing automation or other operational or customer transactional systems that intersect with customer experience and may be on your roadmap. This will be unique to the needs of each organization, but is a critical part of digital transformation. In some cases, integrations utilizing out-of-box APIs may be available and be somewhat simple and in other cases could require more complex and customized development. We suggest tackling these challenges one at a time to ensure you are making incremental, but forward progress on your roadmap.
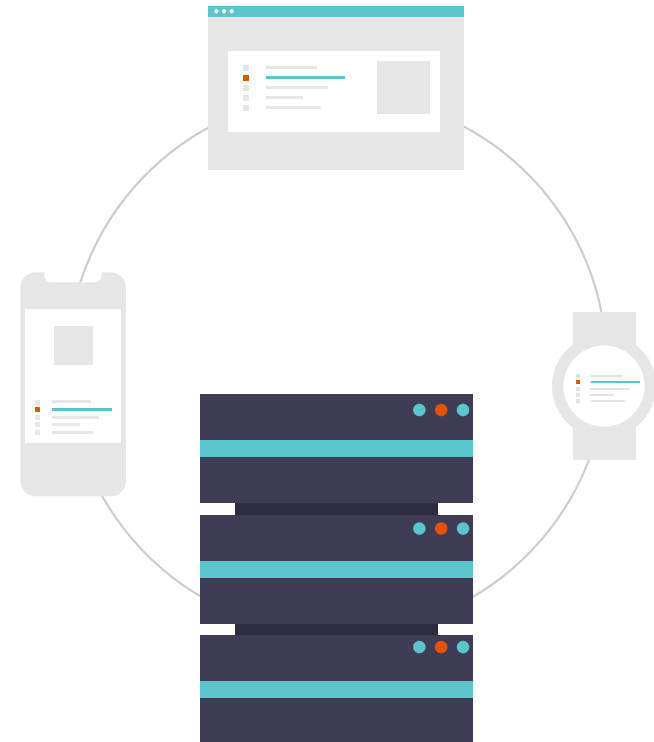
The CX journey is a marathon, not a sprint.

Don't sit on the sidelines and wait for more training or perfect conditions. Just get in the race today by starting small and moving forward.

The CX journey is a marathon, not a sprint.

Don't get discouraged if you don't know where to start or if you only have limited in-house resources to dedicate to CX or digital transformation. There are many skilled partners who can help.

When looking for a good partner, make sure they are:

→ Collaborative and will leverage the knowledge and expertise of your internal team for providing subject matter expertise and in-house support, understanding organizational goals and challenges and navigating internal approvals.

→ Technology agnostic so that they consider your business and customer needs before recommending a particular technology platform.

→ Bring specialized expertise in user experience, web development and data integration and a diverse work portfolio.

→ Proactive and consultative in their approach.

→ Trust-worthy, likable, good listeners. Above all, you've got to like the folks you'll be working with.

SILVERTECH

SilverTech is a digital experience agency redefining how businesses engage with their customers. Founded in 1996, SilverTech delivers digital strategies and solutions that connect user experiences with innovative tech to maximize results. With services such as digital consultation and strategy, website design and development, content management implementation, custom application development and full-service digital marketing, SilverTech provides an unexpectedly enjoyable experience to solving even the most complex business problems.

SilverTech has worked with national and global brands such as Segway, Actors' Equity Association, Nova Scotia Power, Fulton Bank, Palmer Gas & Oil, State of New Hampshire Travel and Tourism, Allison Transmission, and American Dental Association.

Contact us for help getting started.

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