

**CHAPTER 3 - PAGE 23**

|           | <i>Product/Service</i> | <i>Where you went to start learning</i> | <i>Where you found learning</i> | <i>Positive or negative experiences</i> |
|-----------|------------------------|---|---------------------------------|---|
| <b>1</b>  |                        |   |                                 |   |
| <b>2</b>  |                        |   |                                 |   |
| <b>3</b>  |                        |   |                                 |   |
| <b>4</b>  |                        |   |                                 |   |
| <b>5</b>  |                        |   |                                 |   |
| <b>6</b>  |                        |   |                                 |   |
| <b>7</b>  |                        |   |                                 |   |
| <b>8</b>  |                        |   |                                 |   |
| <b>9</b>  |                        |   |                                 |   |
| <b>10</b> |                        |   |                                 |   |

| <i>Today</i> | <i>Could Be</i> |
|--------------|-----------------|
|              |                 |

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List the paths to prerpurchase knowledge.

1.

2.

3.

4.

5.

List the paths to connect and make a purchase.

1.

2.

3.

4.

5.

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COMPETITOR 1: List the paths to prepurchase knowledge.

1.

2.

3.

4.

5.

COMPETITOR 1: List the paths to connect and make a purchase.

1.

2.

3.

4.

5.

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COMPETITOR 2: List the paths to prerpurchase knowledge.

1.

2.

3.

4.

5.

COMPETITOR 2: List the paths to connect and make a purchase.

1.

2.

3.

4.

5.

| <i>Your Prospect Score</i> | <i>Competitor 1<br/>Prospect Score</i> | <i>Competitor 2<br/>Prospect Score</i> |
|----------------------------|--|--|
|                            |  |  |

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|           |   | Yes<br>or No | Minutes<br>Needed |
|-----------|---|--------------|-------------------|
| <b>1</b>  | <i>How long did it take you to find your assigned channel to engage with?</i>   |              |                   |
| <b>2</b>  | <i>Once you started your engagement, were questions asked about you?</i>  |              |                   |
| <b>3</b>  | <i>Was there information you needed to fill out?</i>  |              |                   |
| <b>4</b>  | <i>Were there steps in the process that were helpful to guide you to what you wanted?</i>                                     |              |                   |
| <b>5</b>  | <i>Did they know you and connect you with someone based on your persona or product?</i>                                       |              |                   |
| <b>6</b>  | <i>Did they transfer you? Yes or no. If yes, did the data transfer?</i>   |              |                   |
| <b>7</b>  | <i>Was it resolved?</i>   |              |                   |
| <b>8</b>  | <i>Hold minutes in total to get what you wanted.</i>  |              |                   |
| <b>9</b>  | <i>Reconnect with the channel of choice just used. Did machine learning make it smarter? Did it know what you did before?</i> |              |                   |
| <b>10</b> | <i>Do you feel like you have a relationship with the brand/product? Do you feel special?</i>                                  |              |                   |
|           | <i>Total time invested (customer effort in minutes)</i>   |              |                   |



## CHAPTER 3 - PAGE 31

|          |   | Yes<br>or No |
|----------|---|--------------|
| <b>1</b> | <i>Did the brand get smarter, and did they use the knowledge from the last engagement?</i>  |              |
| <b>2</b> | <i>Is there a self-service option?</i>  |              |
| <b>3</b> | <i>Ask a simple question that comes up a lot and go to Google. Can you find the answer?</i> |              |
| <b>4</b> | <i>Is there a place where you can ask the experts on the website or community?</i>          |              |

## CHAPTER 3 - PAGE 32

Top five reasons customers contact the company:

1.

2.

3.

4.

5.

**CHAPTER 3 - PAGE 33**

|           |  | Yes<br>or No | Score<br>(1–10) |
|-----------|--|--------------|-----------------|
| <b>1</b>  | <i>Can I log in and see what I own and details on my account and profile?</i>                                  |              |                 |
| <b>2</b>  | <i>Can I click on my profile and connect with an expert based on what I own or what I have told the brand?</i> |              |                 |
| <b>3</b>  | <i>Do the engagements get smarter and keep building on what we have learned about each other?</i>              |              |                 |
| <b>4</b>  | <i>Is the product smart enough to alert me and the brand when I am not using it correctly?</i>                 |              |                 |
| <b>5</b>  | <i>Are there experts to help me when I need to be sure I am getting the most out of my products?</i>           |              |                 |
| <b>6</b>  | <i>Can I share ideas or concerns with the brand about my experience? Do they do anything or follow up?</i>     |              |                 |
| <b>7</b>  | <i>Does the brand know me, serve me, and give me an easy, fun way to let them know more about me?</i>          |              |                 |
| <b>8</b>  | <i>Do I get volume discounts or some type of recognition for brand loyalty or for helping others?</i>          |              |                 |
| <b>9</b>  | <i>Can I connect with my peer groups and the brand to share ideas and best practices with each other?</i>      |              |                 |
| <b>10</b> | <i>Does the brand bring customers together to really listen and learn from them?</i>                           |              |                 |
|           | <i>Total</i>   |              |                 |

| <i>Today</i> | <i>Could Be</i> |
|--------------|-----------------|
|              |                 |

| <i>Today</i> | <i>Could Be</i> |
|--------------|-----------------|
|              |                 |

| <i>Today</i> | <i>Could Be</i> |
|--------------|-----------------|
|              |                 |



## CHAPTER 4 - PAGE 42

List everything from the previous session that matters to you:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

## **CHAPTER 4 - PAGE 42**

Top 5 areas that can help you improve your business:

1.

2.

3.

4.

5.

**CHAPTER 6 - PAGE 58**

|                              | <i>SLA</i> | <i>NPS</i> |
|------------------------------|------------|------------|
| 800 calls                    |            |            |
| Email                        |            |            |
| Web chat                     |            |            |
| In-app messaging (all types) |            |            |
| Social (all channels)        |            |            |
| Community                    |            |            |

**CHAPTER 7 - PAGE 70**

| <i>Idea</i> | <i>Impact</i> | <i>Difficulty to Achieve</i> | <i>Time to Implement</i> | <i>Differentiation to Competition</i> |
|-------------|---------------|------------------------------|--------------------------|---------------------------------------|
|             |               |                              |                          |                                       |

**CHAPTER 9 - PAGE 79**

| <i>Area</i>   | <i>Action Items</i> |
|---|---------------------|
| <i>Building an environment of fun, trust, and a willingness to fail</i> |                     |
| <i>Company not campaign</i>   |                     |
| <i>Decide, act, and improve</i>   |                     |
| <i>Empower people</i>   |                     |
| <i>Rewards and recognition</i>  |                     |
| <i>Teamwork</i>   |                     |
| <i>Other</i>  |                     |
| <i>Other</i>  |                     |
| <i>Other</i>  |                     |

**Sheet 1 Channel change savings**

| Channels                            | 1,000 responses per hr |           |      | 250 agents |                   |          |               |                               |
|-------------------------------------|------------------------|-----------|------|------------|-------------------|----------|---------------|-------------------------------|
|                                     | % now                  | % 3 years | Now  | 3 Years    | Cost Per Response | Cost now | Cost 3 years  | Savings Per Hour              |
| phone/chat (traditional 800 #)      | 77%                    | 20%       | 770  | 200        | \$ 7.00           | \$ 5,390 | \$ 1,400      |                               |
| IVR (for self-service)              | 5%                     | 0%        | 50   | 0          | \$ 1.00           | \$ 50    | -             |                               |
| Community +Ai/ML/Bots               | 10%                    | 30%       | 100  | 300        | \$ 0.75           | \$ 75    | \$ 225        |                               |
| Social + Ai/ML/Bo's                 | 5%                     | 15%       | 50   | 150        | \$ 1.75           | \$ 88    | \$ 263        |                               |
| Email                               | 3%                     | 0%        | 30   | 0          | \$ 12.00          | \$ 360   | -             |                               |
| Messaging/modern chat + Ai/ML/Bot's | 0%                     | 35%       | 0    | 350        | \$ 1.40           | -        | \$ 490        |                               |
| <b>Total</b>                        | 100%                   | 100%      | 1000 | 1000       |                   | \$ 5,963 | \$ 2,378      | \$ 3,585                      |
|                                     |                        |           |      |            |                   |          | <b>60.13%</b> | <b>Savings</b>                |
|                                     |                        |           |      |            |                   |          |               | Annual Savings with the shift |
|                                     |                        |           |      |            |                   |          |               | Hrs/Yr 2,080 \$ 7,456,800     |

Sheet 2 Agents needed with change

| Channels                       | 1,000 responses per hr |           |       |           |          |               |                |                |              |                                |
|--------------------------------|------------------------|-----------|-------|-----------|----------|---------------|----------------|----------------|--------------|--------------------------------|
|                                | % now                  | % 3 years | # now | # 3 years | Cost now | Cost 3 years  | Agents now     | Agents 3 years | Cost per hr  |                                |
| Phone/chat (traditional 800 #) | 77%                    | 20%       | 770   | 200       | \$ 5,390 | \$ 1,400      | 154            | 40             | \$ 35.00     |                                |
| IVR (for self-service)         | 5%                     | 0%        | 50    | 0         | -        | -             | 0              | 0              |              |                                |
| Community + AI/ML/bots         | 10%                    | 30%       | 100   | 300       | \$ 140   | \$ 315        | 4              | 9              |              |                                |
| Social +AI/ML/bots             | 5%                     | 15%       | 50    | 150       | \$ 88    | \$ 263        | 2.5            | 7.5            |              |                                |
| Email                          | 3%                     | 0%        | 30    | 0         | \$ 360   | -             | 10             | 0              |              |                                |
| Messaging +AI/ML/bots          | 0%                     | 35%       | 0     | 350       | -        | \$ 490        | 0              | 14             |              |                                |
| <b>Total</b>                   | 100%                   | 100%      | 1,000 | 1,000     | \$ 5,977 | \$ 2,468      | 171            | 71             | \$ 7,299,945 | Annual savings in fewer people |
|                                |                        |           |       |           |          | <b>58.72%</b> | <b>Savings</b> |                |              | Fewer agents needed per hr     |
|                                |                        |           |       |           |          |               |                |                |              | 100                            |
|                                |                        |           |       |           |          |               |                |                |              | 2,080 hr                       |
|                                |                        |           |       |           |          |               |                |                |              | \$ 35.00                       |

### Sheet 3 Training & turnover savings

|                                 |     | Per 100 agents |             |             |                       |             |            |                         |
|---------------------------------|-----|----------------|-------------|-------------|-----------------------|-------------|------------|-------------------------|
|                                 | Now | 3 years        | Agent churn | Agent churn | Annual per agent cost | Weekly cost | Weeks lost | Total trainings savings |
| Turnover savings                | 80% | 20%            | 80          | 20          | \$ 65,000             | \$ 1,250    | 6          |                         |
| <b>Annual turnover</b>          |     |                |             |             |                       |             |            |                         |
| <b>Training &amp; ramp time</b> |     |                | \$ 600,000  | \$ 150,000  |                       |             | \$ 7,500   | <b>\$ 450,000</b>       |

**CHAPTER 10 - PAGE 85**

|   |    |
|---|----|
| Channel change savings                  | \$ |
| Agents needed with change               | \$ |
| Training and turnover savings           | \$ |
| Total annual savings (1 + 3) or (2 + 3) | \$ |