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White Paper

# Evolve Your Mobile Mindset

Deliver the Service Your Customers Expect

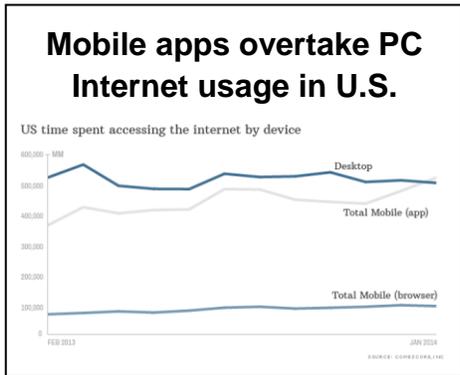
**What's the true value of mobile?  
Giving customers the power to choose how they interact.**

There's a fundamental shift taking place in the way people engage with companies. The widespread adoption of mobile devices makes customers feel they should be able to do anything immediately, and that *they can choose how they interact*, based on their devices' capabilities and their own preferences.

For sales and service, this means you must meet customers on their own terms, seamlessly maintaining the context of their inquiries and presenting information to help resolve issues quickly.

Delivering service like that means evolving your Mobile Mindset. This white paper discusses how you can transform your customer service appropriately—and cost-effectively—to move toward delighting people.

### What Customers Expect Now



↑  
This graph shows mobile overtaking desktop in January 2014. See [here](#).

In 2014, mobile computing overtook the desktop.<sup>1</sup> This is reflected in the fact that half of consumers have used mobile devices to search for products and services

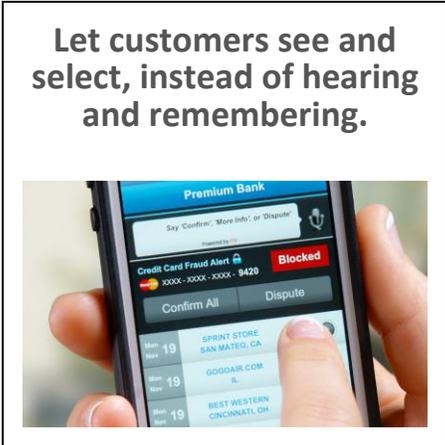
online.<sup>2</sup> Despite this explosive growth, customer service interactions are still dominated by call-only scenarios. But smartphones and tablets are changing the game. People move seamlessly from web to chat to social, and they expect instant access to information throughout. In customer service this gap is being filled by companies that give customers choices for interacting with them. The best interfaces take advantage of the capabilities of mobile devices, offering visual displays and touch-based interfaces.

That range of choice not only feels natural to customers, it gives them control. They can easily get the service experience that fits their environment (maybe it's noisy or they're at work). They might start with text chat, easily switch to voice-only service, or combine traditional IVR with see-and-touch displays. Fluidity like that is redefining what companies offer. You see this yourself almost every day: Your bank, online stores, insurance providers, airlines and countless others continuously raise the bar with apps that let you transact almost anything from your phone.

### Evolving Your IVR

Those companies have adopted the Mobile Mindset. They understand how their customers behave; the devices they have; and continuously improve their experiences. Like them, you could configure your customer service offering to:

- Take advantage of mobile interfaces
- Tap your data and present it contextually, on-the-fly
- Delight customers by acting on their behalf and letting them choose how they interact.
- Make your customer service more efficient



Consider this example:

You work at a payment card company. Specialized third-party software detects an irregular purchasing pattern for customer Jane Smith.

- This triggers a proactive call to Jane.
- An automated agent confirms Jane's identity then describes the purpose of the call.
- Jane is asked if she'd like to review the suspect purchases on her smartphone.
- She verbally agrees to this self-service, and the list is pushed to her smartphone's screen.
- Jane confirms the purchases, and the automated agent restores her card to active status.

This scenario made resolution fast and easy for Jane by letting her see and select items, instead of having to hear and remember them. It delivered an experience that can improve NPS without the need of a human agent, thus controlling costs.

**Mobile's choices improve agent productivity and delight customers.**

**NPS • CSAT • FCR**

*In inbound situations, mobile devices can enable the same sorts of advantages.* Your agents can quickly push information to people, formatted for their mobile devices, and let them interact according to their preferences. They can move among channels—chat to voice, for example—and the information they see picks up right where they left off. This creates service that improves agent productivity and delights customers.

## Mobile-First Service without a Heavy IT Lift

Of course, it's one thing to envision an optimized-for-mobile service environment, and quite another to implement it given budgets, time and other required resources.

Or so you might think.

Today's reality is that if you have customer data, third-party software can be deployed quickly to mine it, capture pertinent information and make it available to both agents and your customers, perfectly formatted for

each of them. There's no need for you to attempt home-grown solutions that take many times longer to build, are difficult to maintain and cost significantly more.

You don't need to host the solution, either. Third-party, cloud-based platforms interact with and continuously learn from your data at a massive scale. They combine predictive analytics and real-time decisioning, putting to work the breadth of information from your customers' journeys across your online presence. Then they make it available precisely when and where it's needed.

What's in the mix?

- Customer and transaction history data from ERP and CRM systems
- CRM data on billing history, past purchases, and loyalty programs
- Real-time web and IVR data
- Agent performance and disposition data
- Location data from smartphone or tablet apps
- Survey data
- Chat and voice interaction transcripts from contact centers
- Data from social media tools

*The result:*

Better customer experiences and outcomes.

## Make Customer Service Part of a Unified Experience

Given all this, what should your mobile engagement *look* like? There's obviously value in designing sales, support and service channels that appear and operate similarly. Companies that have mastered this (think Apple) have among the highest brand identity, customer loyalty and repeat business. Unfortunately, in too many cases a company's service experience doesn't live up to its sales and marketing components. Many are stuck in a single mode (such as voice or text), with legacy user-interaction and limited data incorporation.

The Mobile Mindset requires an evolution beyond this. If you're going to give people choice in their service interactions, you *must* do it with a well-conceived user interface and data-oriented design. Otherwise you risk losing customers. That means developing layouts specifically for particular mobile device screens, and displaying them automatically. It also means presenting intuitively-navigable *layers* of information that make it easy for customers to see things in context, and act.

These interfaces should make your customers feel that your company is as easy to deal with for service as it is for sales or tech support. You show that you know who they are, what they've transacted and how you can make their lives easier.

Of course, designing such interfaces—which are linked to customer data and service-agents' screens—certainly can be done by third parties who are not invested in understanding the underlying datasets. But real power and efficiency comes from tight integration with that data. It could be to your advantage to use a solution that includes integrated design, and involve your existing UI/UX professionals as needed to ensure your branding and other elements are incorporated as desired.

## Put the Mobile Mindset in Motion

This white paper introduces the notion of the Mobile Mindset, and its central idea: Giving people choice about how they use your service offering. Few companies attempt across-the-board changes, reengineering their sales, technical support *and* customer service to accommodate mobile in a single pass. Instead, most develop a broad mobile-centric vision and assess which component affords the most value. Often that leads to addressing their customer service or ecommerce offering first.

If that matches your thinking you can learn more in the book, "The Mobile Mindshift," by Forrester Research. For a complimentary copy, please email [queries@247-inc.com](mailto:queries@247-inc.com).

<sup>1</sup> Source: money.cnn.com, "[Mobile apps overtake PC Internet usage in U.S.](#)" February 28, 2014.

<sup>2</sup> Source: www.parature.com, Pew Research cited in "[Mobile Engagement: Make it Easy for Your Customers Holding the Phone.](#)" February 25, 2013.

## Top Three To-Dos for Evolving a Mobile Mindset

### Be *in* that mobile mindset

In addition to the points in this paper, learn what you can leverage from mobile devices to improve your customers' sales and service journeys. This could include:

- *Location*, such as being able to "check in" at a retailer
- *Second-screen experiences*, like making payments in conjunction with retailers' hardware and systems like Apple Pay, or video capabilities such as AMEX and Amazon's MayDay

The list keeps growing, but the key is that mobile devices are powerful, user-friendly devices that customers expect to make things easier for them.

### Develop an omnichannel strategy

Mobile is fast becoming the online front door to your company. Even when they don't start with mobile, customers feel their journeys should be consistent. That means you need a multi-pronged strategy that makes customer experiences seamless across devices, channels and even separate sessions.

### Get the user experience right

You'll delight customers when you show them information in ways they can act on immediately. So it's crucial for designers to understand what that includes. Essentially they'll develop interfaces with your "big data" just below the surface, ready to be displayed based on user needs and preferences. Get this right and the word will spread.

## About [24]7

[24]7 makes customer service and sales simple. Our platform and applications use big data and predictive analytics to understand customers and drive better service and sales results for large enterprises. We do this over 2.5B times a year for the world's leading companies.

[24]7's platform enables an omnichannel interaction experience. We connect customer interactions across an enterprise's web, mobile, chat, social, and phone channels. It's all in real-time and in the cloud.

Our solutions drive immediate business results. We increase revenues, reduce service and sales costs, and create more satisfied customers.

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