USING HUMAN INSIGHT TO CREATE A SEAMLESS TECH EXPERIENCE

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When the COVID-19 pandemic hit in 2020, many companies found themselves flat-footed, trying to run as fast as they could to modernize after ignoring some glaring issues for years.

For all intents and purposes, employee technology needed the most work. Suddenly, employees had to operate from kitchens and living rooms around the world, with only 40 percent of IT leaders and CIOs saying their department had the right tools, policies, and procedures in place to support a remote workforce. In a work-from-anywhere, hybrid world, the ability to walk over to talk to someone, or ask for help, is much more difficult. Employees are left scrambling to be responsive to customer demands and remain effective in their jobs without the right technology needed to do so.

The irony of course is that there are more than enough technology options out there today to do pretty much anything you could dream of, whether you're working from home or in an office, or whether your work is cloud-based, on-premise, or a hybrid of the two. So then why do businesses struggle to properly equip their employees?

Companies that have invested in new tech but whose employees are still frustrated by the technology likely have an integration problem, not a technology problem, per se. People are not trained on the new tech, so they don't use it. New processes, or lack thereof, get in the way of improved productivity and efficiencies.

And yet, even with those realities, there appears to be no slowing down on purchasing new technology.

It may look good on a slide in an executive's presentation deck when IT deploys a new CRM, mail, finance, or expense system, but managers often underestimate the degree to which introducing new systems may incite employee uncertainty and resentment, especially if it is not a seamless experience.

Furthermore, if you reduce or cut training, wait to integrate new tech with existing systems, or ignore broken processes—all in the name of reducing costs—how can you expect the employee experience to improve?

That approach is not just shortsighted but may lead to an actual deterioration in EX. If you've touted some new technology as a way to fix the ills of the past and improve employees' day-to-day work lives, and then it doesn't, what does that say about your company's planning and leadership?

INTEGRATE YOUR SYSTEMS

To implement helpful, streamlined, and simplified technology in your business, start by recognizing that the average enterprise operates a library of more than nine hundred unique applications to help run the business. That's stunning, but what is shocking is that only 29 PERCENT of those applications are integrated with other applications.

Even assuming that a sizable percentage of those nine hundred average apps are used in the back office to run the company's operations, that still leaves hundreds of applications that aren't integrated with others, creating system and data silos.

When one of your employees gets a service call, why do they need to log in to the billing system, log in to the CRM system, and then log in to a half dozen other apps, just to properly serve that customer? Think about the last time you called in to a company's customer service department. It's possible you were transferred multiple times to get the right department, then you had to repeat yourself ad nauseam to explain the problem to different people, or you needed to tell them what product or service you were even calling about in the first place. It's maddening!

The reason that happens? Systems are not seamlessly integrated, processes between different groups are not established, nothing about the experience for the customer or the employee is frictionless, and leadership isn't willing to do the work or spend the time to get it fixed. At least, that would be what the data implies. Otherwise, the argument would be they are just flat-out unaware or don't care.

CEOs need to get all the various business unit leaders across the company to participate in technology-related planning in a more holistic way.

To be clear, this scenario isn't reserved only for customer service departments. I had a conversation with a midsize company who explained it took three weeks to close their quarterly books because of the multiple systems that were required to pull sales, shipping, and inventory data together. They recognized there must be a more efficient way to approach the process, so they kicked off a project to simplify the process in under a week.

The project included soliciting suggestions and feedback from the accounting team, enlisting IT to help integrate disparate systems, and streamlining processes. The result? Six months later, they were able to close the books in three days. The CEO and investors were happy, but more importantly, the employees tasked with closing the books each month were happy. Not only had they been actively engaged in the project, but ultimately, the results made their jobs easier.

Again, executives don't want to make life difficult for their customers or employees. But difficulties arise when there isn't a clear understanding of why the dissatisfaction exists. To create an Experience Mindset, a change management team must be put in place, even if it is just one person to catch these scenarios before they become a terrible experience for everyone, costing companies time and money.

IT'S LIKE MAGIC

Automation is a huge part of any process improvement and employee effectiveness discussion, and it is a critical piece of the entire PPTC framework. Ninety-three percent of organizations see automation as a means to create better CX. Highly automated organizations are typically enjoying a 10-percent-plus up lift in EX, new customer acquisition, commercial performance, and ease of resolution.

In the future, customers will not just value efficiency most in their experience, but they will be willing to pay more for it. This fact should squash any concerns about ROI. While improving the experience for customers is good, automation should ultimately improve the experience and reduce effort for BOTH customers and employees.

Research shows that only 33 percent of employees agree that their company automates basic tasks, allowing them to focus on actual work, while 52 percent of the C-suite agree. Again, while the twenty-percentage-point difference should be an area of concern, the bigger issue is that the C-suite is fine with employees wasting time doing what automation could easily accomplish.

Using automation can ensure a process is followed consistently every time, eliminating the unknown human variable. It frees employees to focus their unique human traits—including imagination, improvisation, novelty, interpersonal relations, and empathy—on "exceptional" challenges, one-off events, and complex human interactions during those moments that matter, rather than mundane, routine tasks. The use of automation can create better-connected employee experiences.

Spend the time surveying stakeholders, prioritizing needs, identifying common features and functionalities, and then documenting those requirements.

In short, automate wherever possible to minimize effort and maximize efficiency for employees and customers without sacrificing experience.

TECHNOLOGY IS A TEAM SPORT

Designing, developing, and supporting a company's technology road map has historically been the remit of CIOs or IT leaders. However, as more business units deploy their own technology and silos remain fiercely protected, creating a seamless tech experience throughout the company requires a new approach. CEOs need to get all the various business unit leaders across the company to participate in technology-related planning in a more holistic way. Now is the time to build those bridges between groups and develop a new operating mindset.

The responsibility to determine what tech is best for your business cannot rely solely on IT. They of course need to be involved, but they typically don't have a day-to-day line of sight to frontline employees' issues outside of maintaining work-issued hardware and software as well as tech support. They may, for example, help employees when their computers are down or a system is experiencing a glitch. But they rarely, if ever, have conversations with employees about how to make the systems they use more effective, what applications need to be integrated, and what systems they spend the majority of their time using.

Some companies are waking up to the importance of interdepartmental collaboration. Of the IT professions surveyed, 57 percent now collaborate more closely with the HR department. Almost two-thirds (64 percent) of CIOs say they work more closely with the CHRO.

With those stats in mind, think about your own company: Does your CIO make it a regular practice to pull HR into the technology assessment process? Does IT include sales, customer service, and marketing leaders in request for proposal (RFP) discussions? Do they meet with other groups to get a pulse on employee satisfaction and usage?

If your answer is no to any or all of these questions, then your employees probably aren't as happy as you think they are with the technology and systems you have deployed. Interweaving CX and EX technology needs assessment (TNA) will lead to mutually beneficial outcomes for everyone. Spend the time surveying stakeholders, prioritizing needs, identifying common features and functionalities, and then documenting those requirements. That way, there's a greater chance that process integration and application integration happen before new systems and tools roll out into the hands of employees and customers.

Ultimately, every discussion related to technology should happen with IT in the room. It is the IT department—and particularly the CIO—that ensures all stakeholders benefit from a technology solution, not just one silo.

INVEST EQUALLY

If IT does not include a conscious sense of balance between EX and CX tech investments, whatever choices they make will ultimately unbalance the company's Experience Mindset.

Note, I am not referring to a balanced spend; I'm referring to a balanced experience or effort improvement. For example, say IT develops a new portal where customers can pay a bill, open a ticket, or change the nature of the service they are receiving.

At the same time, IT must also ensure that there is a corresponding way for employees to handle each of those requests, one that is similarly easy to use and just as frictionless as on the customer side. Can you say with assurance that your IT exhibits this type of balance?

There is no "fail-safe" switch to automatically keep CX from being dominant. No automated system will ever maintain such a balance and synergy.

Rather, the only way to maintain a balance between the tech investments made for customers and employees is dynamically using human beings to constantly monitor the situation, **and to meet and negotiate the strategy and tactics for keeping technology aligned with an Experience Mindset.**

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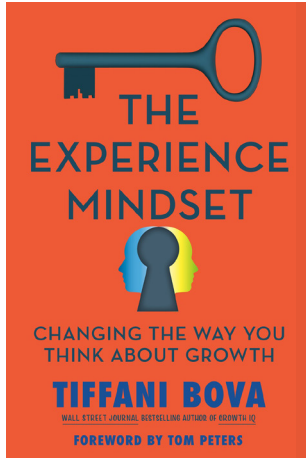
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