



# Experience Roadshow

The workshop-on-wheels  
in a book!



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# 01 The Freshworks Experience Roadshow

Relationships are at the heart of every business. Our companies are no longer in the business of software, retail or travel; we're in the business of experience.

To say that, however, and to live it are two different things. It requires a complex mix of both front and back end technology, people and processes to deliver an exemplary customer experience, supported by the right technology.

That's why we put together the Experience Roadshow. Bringing together experts from a range of disciplines and sectors and mixing them with speakers living these challenges day-in, day-out, this set of workshop-on-wheels toured across Europe in October 2019. Almost 2,000 attendees heard how they can thrive in the experience economy.

Each event was full of insights, passionate discussions and thoughtful commentary, and we didn't want those who couldn't make it to miss out. That's why we've collected some of the summaries from the most popular sessions in this book. It's the only place you can access the latest information and expertise from the likes of customer engagement expert Adrian Swinscoe, Simone Jo Moore, a specialist in Service Management and Human API, former Carrefour digital leader David Schwarz, Julien Cordorniou, vice president of Workplace at Facebook, and others.

From AI in the contact centre to balancing speed and security, via how one major publishing company is evolving its customer experience and how organisations can deliver next-generation IT service delivery, this book is a great place to start thinking about how you can enhance your customer experience and take your IT service and delivery into the future.





# 02 An Introduction To Customer Experience

“Make life easy for your customers and they are more likely to stay and buy again.” That, according to Gartner, is the result of what it calls the effortless experience. After all, good customer experience is all about how easy it is for the end-user- not the ‘exclusive discount’ or free gift, but consistent and frictionless interactions.

Why should you care about a so-called effortless experience? According to a much-reported article in Harvard Business Review, *“Of the customers who reported low effort, 94 per cent expressed an intention to repurchase, and 88 per cent said they would increase their spending. Only 1 per cent said they would speak negatively about the company. Conversely, 81 per cent of the customers who had a hard time solving their problems reported an intention to spread negative word of mouth.”*

It is the holy grail of customer experience - not only guaranteeing repeat custom but increasing it too. At the same time, the HBR article highlights how the journey is as important as the outcome - if it is hard work, you are more likely to hear about it negatively.

So, how do you ensure you are delivering a frictionless customer experience? It’s critical to realise that relationships are at the heart of every business. No matter what they sell, what sector they operate in or industry they target, all companies are now in the experience business.

To help organisations understand what that means for them, we put together the Experience Roadshow. Covering 11 cities, with speakers from Microsoft, KPMG, Médecins Sans Frontières, Facebook and many others, the Roadshows saw almost 2000 attendees hear how they can thrive in the experience economy.

Of course, not everyone had a chance to attend. That’s why we’ve put together this book, capturing the key insights from the Roadshows, giving you the chance to hear from the likes of leading retailer Carrefour, independent publisher Sage Publishing and customer experience expert Adrian Swinscoe. Drawing on their presentations and Q&As from the Roadshows, you can find out how to drive contextual engagement and leverage the power of collaborating. In short, everything you need to help create your own customers for life.

**Vivek Asija - Head Of Product Marketing, Freshdesk**

**Experience Roadshow** - The workshop-on-wheels - in a book!

02





## **2.1 Customer 360 And The Future Of Customer Engagement With David Schwarz - Retail And Digital Executive**

Did you know that 66 per cent of consumers have used at least three different communication channels to contact a company's customer service department? It's little wonder that being able to deliver a consistent experience is a major focus for businesses. Over 50 per cent report their most critical customer experience issue is "providing a seamless experience across multiple channels".

That means having a focus on omnichannel engagement. That's easier said than done; at our Experience Roadshow event in London, retail and digital executive, David Schwarz, said "Real, true omnichannel is complicated and takes time."

For David, who spearheaded Carrefour's e-commerce start-up acquisition strategy, it takes "culture, systems and processes" to deliver omnichannel success. However, in order to do that, businesses need to be where their ideal customers want them to be. In other words, they need to be offering the right channels. If targeting a demographic with low social media use, or one that is less likely to use the phone, then it makes little sense to invest heavily in those areas.

Once that's determined, businesses can start thinking about how they incorporate contextual engagement, where customers moving between channels can receive a progressive level of service. This means not having to repeat themselves, not feeling like they are going back to the beginning whenever they encounter a new agent or move on to another channel.

David talked about how the key to this was Customer 360 - the idea that you can build a complete view of the customer, thanks to the data businesses gather through interactions with them. It's a notion that's been around for some time, but it is only now, as we start to realise the potential of digital tools and use them to harness the masses of data we all generate, that it can go from theory to reality.





Once this has been achieved, David said, brands can enable deeper levels of engagement across all their channels. He outlined three levels to achieve this:



### **Personalisation**

Delivering bespoke communication consistently



### **Enhanced Technology**

Utilising apps, chat systems and real-time information to deliver deeper levels of personalisation



### **Sophistication**

Intuitive, intrinsic and market leading

Businesses that make those steps are more likely to build better engagement with customers, and therefore more likely to enjoy the rewards of enhanced customer loyalty through a more seamless omnichannel experience.





## 2.2 The AI Powered Contact Centre With Adrian Swinscoe

According to customer experience consultant, Adrian Swinscoe, the average business offers a choice of 11 different channels. Where historically these would have been delivered by human agents, an increasing number are now powered by artificial intelligence (AI).

The attraction to organisations is clear to see - implementing AI-powered solutions should, in theory, help solve the majority of customer queries, freeing up valuable human workers to focus on more complex matters.

It ties into what Adrian called the reactive/proactive challenge. 87 per cent of customers want to be contacted proactively, leading to 73 per cent saying it improved their opinion of the company. It's a goal for businesses too - if they can be proactive, they can, in theory, solve issues much sooner than having them escalate, and, therefore, reduce the resources needed to close problems.

To do that with an exclusively human workforce is prohibitively costly - AI solutions, on the other hand, can analyse data and provide actionable insights much more quickly, which should enable real people to offer proactive service.

However, the challenge is not to slip into an overreliance on technology, particularly when it comes to reactive communication - according to one study, 77 per cent of individuals want human interaction when they need guidance. Even more concerning is their frustration at not being able to speak to a real person when they need a problem resolving.

Adrian saw this as an indication of the increasing reliance organisations have on digital technologies to deliver customer service. This suggests that many businesses are over-emphasising the role of technology, and that they need to rebalance digital tools with human involvement in their customer experience operations.

As he said, simply adding new channels is not a strategy, as it results in silos and a lack of connection, disrupting that seamless experience from digital tool to human interaction and back again.





He went on to quote Andrew McNair, head of global benchmarking at Dimension Data, who said “Establishing a channel presence is not a complete strategy in itself. Good strategy is about understanding what you want to accomplish, who your customers are, what your own operational and business goals are and, then, designing a plan around that. It’s not about having a scattergun approach. But it seems that is the way that many organisations are operating right now.”

For Adrian, the key is to establish context between channels. Fundamentally, companies need to be developing experiences that allow their customers to easily move between digital and human interactions so they can get the experience and the service they want.





## 2.3 Collaboration & Customer Support - Getting All Hands-on Deck With Birk Angermann

Great service may be delivered to the customer by one agent, but it takes an entire team to make it possible. Most customers are only exposed to a small part of the effort it takes to provide the experience they receive and are only vaguely aware of the collaboration that takes place behind the scenes to help them with their query.

It's that collaboration that is at the heart of every great customer experience. As Birk Angermann, head of customer success at Freshworks, pointed out, "Agents work across teams, bringing in specialist knowledge and connecting with colleagues to ensure that, if they can't solve it, someone else can." It has immense benefit - employees who collaborate regularly work 15 per cent faster on average; 73 per cent do better work; 60 per cent are more innovative and 56 per cent are more satisfied.

However, Angermann noted, "for agents to facilitate this in real-time, they often resort to unofficial communication channels". This might be messaging apps like WhatsApp, internal collaboration tools such as Slack, email or even cloud-based services like Google Hangouts.

While this may get the immediate job done, the lack of proper process, governance and accountability can cause problems further down the line, whether on other customers or when a seemingly satisfied query has to be revisited. In these situations, the lack of a single point of truth, and the loss of context, can lead to tickets being passed from team to team and no single person owning the issue.





Businesses therefore must balance the need for accountability and context with the potential of collaborating across multiple tools. To achieve that, Angermann outlined three key trends they need to follow in order to make collaboration a part of their support workflow:



### **Deliver Collaboration And Context**

Are your teams on the same page? Do they even know who has helped them? A quick Slack post might have secured a response first time, but do they know who to go to next time, how that team operates and what processes it follows? Bring your teams together so that they can understand where they fit in, how they can constructively collaborate and what processes everyone operates in



### **From Assembly-line To Pitstop**

Rather than simply pass the problem from one point to another, could teams be working on the same issue in tandem? If team A understands what their role is in relation to team B, you increase their chances of being able to work more effectively together to get the job done efficiently and with the best possible outcome.



### **Feedback, Feedback, Feedback**

Just because the result was positive doesn't mean the process was. Going back to the idea of effortless experiences, what could have been done better to ensure an easier journey to the end point? This could be internally, such as knowing who is available to help on certain issues; it could be about keeping communication open with the customer. The point is to ensure that opportunities for improvement are identified and proactively addressed.





## 2.4 Delivering Better Service And Operational Efficiency - A Customer Success Story With Graeme Doswell

As well as hearing from expert insight, attendees at the Experience Roadshows got to hear from Freshworks customers on how they are delivering high quality customer experiences. In London, that was Sage Publishing, an independent publisher with offices in the UK, US and China.

Graeme Doswell, head of business solutions and system operations at the publisher, gave the attendees some insight into the challenges publishing was facing, saying “many publishers are calling themselves tech companies now. That said, like many changing industries, while our customer-facing services are seeing increasing investment, back office systems can struggle to keep up and have perhaps been a bit neglected.”

As part of a programme to rectify that, Sage has been investing in this area. This was sorely needed - as Graeme pointed out, prior to the investment “we had many pockets of niche support that operate in silos, using a mix of shared inboxes. Unsurprisingly, this made it difficult to report and understand our workloads, monitor the quality of our responses and ensure nothing fell between the cracks.”

To that end, the publisher adopted Freshdesk. “We saw it as a solution that could deliver both better service for customers and help us improve operational efficiency.”

With over 100 agents, it was important to ensure that the implementation of Freshdesk didn't impact the customer experience. Sage enrolled one team at a time to ensure that the implementation team could provide each agent with the necessary support and attention. “We really only had one person working on the implementation, as Freshdesk's simple and intuitive approach made it easy for people to get to grips with once they'd had some training and time with it. It's designed for workflows, so it helps people to understand how it will help and what it replaces in their current working patterns.”





Indeed, such was the acceptance of the solution that the only challenge came about when one team was overconfident in how easy it would be and didn't give it enough attention.

"The results speak for themselves," Graeme said. "We're seeing lower complaint volumes and good service level agreement adherence. This may be in part but due to previously overcounting, but even the fact that we're getting a more accurate, trusted picture is invaluable as we can better plan workloads. We're also using the system to improve our general working practices and how we collaborate. People can see the history of a query and pitch in if something is taking longer to resolve, which in turn helps speed up our resolutions."

Investing in Freshdesk is just the first step for Graeme and Sage as they adjust to what the future holds. "We're likely to see more consumers getting in touch, bringing with them increased demand for more intuitive channels that can scale, such as WhatsApp. As publishing evolves, so does our customer base, so we need to be able to find ways to cope with that. Having Freshdesk gives us a good foundation on which to build on. We're looking at integrating our other systems to get a much broader single version of the truth, and we' also need to be able to deliver innovations like self-service and artificial intelligence. Done properly, these will help us realise immense benefits, but we need to start somewhere. That's Freshdesk."





# 03 An Introduction To It Service Management

## The Technology Foundations Of Your Employee Experience

Just as you can't build a house without foundations, so you can't deliver a truly relevant employee experience in the digital era without the technology to enable and support it.

For most organisations, that means going through a complete transformation, moving from siloed to unified IT, allowing them to operate with context, collaboration and speed. However, where many organisations fall down is to view it as purely a case of changing software and hardware. What often gets overlooked is the human element - having the right skills in place, understanding how culture (both within IT and across the wider organisation) needs to change as much of the systems themselves, and ensuring that both technology and people work hand in hand, rather than competing with each other.

Part of this involves new and improved ways to actually deliver IT services. As well as existing technology, it means considering how emerging tools can help deliver IT support at scale, all with the aim of enabling a better experience for the digital, always-on workforce organisations need to meet customer service requirements.

At the same time, expanding digital footprints mean increasing the risk of cyber-attacks. Greater surface area equals more under threat, and many organisations are struggling to balance this greater need for security with the demands of modern working - i.e. speed, agility and flexibility. Locking everything down simply isn't an option, but neither is allowing bad actors to run amok and cripple vital systems and services.

It's a complex mix of challenges that need to be overcome if organisations wish to establish the right technology foundations for their operations. To that end, and to provide the insight leading businesses are looking for, we included a deep-level IT service management track in our Experience Roadshow. Almost 2,000 attendees heard from the likes of service management and human API expert Simone Jo Moore and Karen Janssen, chief information officer at Corporate Travel Management UK.





We wanted to ensure that their thoughts and expertise reached as wide an audience as possible. As a result, the following pages capture the summaries of their talks, covering how to unify IT operations, delivering next-generation IT services and balancing security and speed. In doing so, we aim to give you an introduction into the sort of considerations large organisations need to be making when it comes to developing a technology foundation that is fit-for-purpose to support businesses operate effectively in today's digital marketplace.





### 3.1 A Unified Approach - Bringing Together Technology And People - Simone Jo Moore

As businesses evolve their technology infrastructure, they need to avoid taking legacy issues and digitising them. Where traditional IT was bedevilled by silos, a digital operation needs to be fully unified if enterprises are to work collaboratively, quickly and with context.

For Simone Jo Moore, a leading thinker in service management and human API, these silos are as much about culture as they are about technology. As she says “first and foremost, transformation is cultural and organisational. Too often we put complex human affairs into algorithms and technology, making it more complicated than it needs to be.”

Simone’s point is that the technology organisations invest in is really just a catalyst for driving that broader change. The issue is businesses see tech as the answer, and implement it, without necessarily having a stable base from which to manage it effectively. For instance, using artificial intelligence and machine learning in HR to screen interview candidates might seem efficient, freeing up staff to work on more complex matters. Yet if the organisation which implements AI and ML does not have a solid foundation, those technologies could actually add, or speed up, existing issues. In HR’s case, unconscious bias might seep in, undermining efforts to diverse workforces. In IT, existing silos simply become digital.

As Simone says “the more we are able to understand and predict the outcome of our actions, the more chances of success we have. However, in situations where we have less knowledge and predictability, the approaches and techniques we use are vital in ensuring we establish stability.”

What it comes down to is knowing what you want to get out of your transformation. Want to be more efficient? Implementing an AI solution may not actually be the right approach, if in doing so requires a much greater root-and-branch overhaul that wasn’t previously in scope. This leads on to understanding the digital context of your organisation and how the actions in one function impact others.





This is critical, as it could be that rather than a wholesale transformation, what you're actually doing is optimising, building on work that has already taken place in or is in use by another part of the business. However, to realise this, you need the right skills, an understanding of how they will evolve, and what your teams need to know.

Underpinning all this is what Simone calls “Techno-ethics.” This links back to having that stable foundation as a counter-balance to digitising potential issues, for instance in the HR use of AI and ML. Simply outsourcing responsibilities to that technology, without considering the need for strong governance, is likely to lead to ethical problems proliferating, powered by digital scale and speed. What determines that needs to be an initiative such as the Framework for Trustworthy AI, based on fundamental rights and ethical principles. It lists seven key requirements that AI systems should meet in order to be trustworthy, enabling organisations to implement the technology and avoid digitising unconscious bias, for example. In other words, having the organisational processes in place to utilise technology effectively, rather than create new problems through legacy thinking.





### 3.2 Delivering A Next Generation Level Of It Service - Scarlett Bayes

In the same way that the implementation of technology requires cultural change, so too does a new way of working require new ways of delivering IT services.

As workforces become digitised, with an always-on approach, they need IT services that enable them to work in that manner. The days of one PC, one location are over, and so to are traditional approaches to IT support.

Fundamentally, the always-on workforce requires:



**Accessibility -  
Anywhere, Anytime**



**Accuracy**



**Speed**



**Intuitive User  
Experience**

That means that IT services need to enable these core principles. Using legacy technology may hinder, rather than help, deliver those requirements, so do emerging tools hold the key?

Certainly, doing things differently ranks highly for IT service desks. Research from the Service Desk Institute highlighted that 75 per cent of service desks intend to use more automation in the next 12 months, up 5 per cent from 2017, with increasing value to the business and reducing inbound calls also scoring highly (68 per cent and 62 per cent respectively). Being able to automate, and reduce inbound calls, feeds into what many service desks considered digital transformation to be - 87 per cent responding that their digital transformation projects entailed self-service.

Self-service is at the heart of what a next-generation level of IT service looks like - it's the only way organisations can deliver a seamless experience across multiple channels, tailored to user preference. Incorporating emerging technologies, such as AI-powered chatbots or utilising machine learning within self-service systems, can ensure that it's delivered at the pace users want at scale.





So, where do businesses start when it comes to implementing next-generation IT service deliver?

### **Start Where They Are**

- Consider the existing service desk efficiency - what are its strengths? More importantly, where are the weak points? Are they easily fixable, or are they the reason for a full transformation?

### **Establish The Why**

- Success lies in uniting stakeholder efforts in the pursuit of a shared goal, so establishing that focus is critical

### **Define Where You Want To Be**

- Consider how that shared goal aligns with the organisation's long-term strategy and vision
  - how does next-gen IT service delivery contribute to that?

### **Build A Roadmap**

- Having a clear direction of travel is critical to keeping all parties on the right path, but it needs to be defined by milestones, while accommodating a degree of flexibility

Take this approach, and organisations are on the right path to developing the sort of next-generation IT services that users are crying out for.





### 3.3 Balancing Security And Speed - Karen Janssen

The digital era is defined by its speed and agility. Yet in enabling these attributes to deliver an exemplary user experience, are we exposing ourselves to more sophisticated threats?

Karen Janssen, CIO at Corporate Travel Management UK, outlined the layered approach to security most organisations have. It starts at the application level, with the apps securing data, and access to those services protected by firewalls. The devices we use for that access are in turn protected with end-point security, while traffic itself is managed by a combination of firewalls and load balancers managing the network and the perimeter.

But, as Karen asked, “are all these security measures enough? Are they enough to ensure access to the right information at the right time, while maintaining the sanctity of data and keeping bad users at bay?”

The evidence suggests no. Karen’s own analysis of studies and research suggest that over 10 billion records have been compromised to date, equating to an average of 1.4 billion records per month. Globally, 60 per cent of enterprises have suffered a breach at some point, thanks to a mix of threats, including ransomware, phishing, malware and zero-day vulnerabilities.

What’s perhaps ironic is that while it is the greater use of technology which is both undermining security and facilitating the growing number of successful attacks, it’s ultimately a human, rather than a tech, problem. Whether it’s taking shortcuts to aid business speed, using simple passwords which they share, not protecting sensitive data, not privileging access properly, delaying patches or engaging with unsolicited email from unknown sources, time and time again it is people that are the weak link in any security model.

That doesn’t necessarily mean it is solely the responsibility of individual employees. Karen pointed out that “there is a significant cultural aspect at work here. Even having best of breed security controls in place means nothing if there’s poor adoption, if there’s a lack of governance or a culture where getting things done is more important than doing them properly. In our pursuit of speed within business, people circumvent protocols to get results.”





For Karen, it's about balancing security and speed, using people, process and technology:



### **People**

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Identify the right people with power to effect change and collaborate with them. That might mean turning them into super users, locating shadow IT applications, or simply having an open culture in which people can talk about the challenges they face without assuming IT will simply say no. Sharing technology ownership with the wider business can also stop unauthorised workarounds or installs occurring, and get more people to understand their security responsibilities.



### **Process**

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Develop checks and balances, practice-controlled consumerisation of technology but ensure there are quick approval processes in place. Being able to identify bottlenecks in how you deliver technology is critical, as is frictionless access to the apps the business wants, rather than what you've prescribed. Most importantly, manage data, rather than devices.



### **Technology**

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Understand business requirements in order to make informed technology choices, looking at apps and services from a user perspective rather than a cost view. Look at how self-service and automation can assist your IT organisation in provisioning new technology - if the same person has to answer request and implement them, bottlenecks will occur.

Businesses need to be fast - they also need to be secure. By looking at how people, process and technology come together, Karen stated that organisations can mitigate the damage of any breaches while delivering the accelerated pace companies are looking for in the digital era.





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## ABOUT FRESHWORKS

Freshworks provides innovative customer engagement software for businesses of all sizes, making it easy for teams to acquire, close, and keep their customers for life. Freshworks SaaS products provide a 360 degree view of the customer, are ready to go, easy to use and offer quick return on investment. Headquartered in San Mateo, Calif., Freshworks' 2,500+ team members work in offices throughout the world.

For more information, visit  
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