



CX Insights

CX Personalization Research: How to Personalize Agent Interactions in Ways that Matter to Customers

Why Read this Report?

Among customer experience (CX) professionals, interest in personalizing CX is always a hot topic, but companies often invest too much time and too many resources in things that don't matter much to customers. The reason? Most CX leaders don't know what consumers really want in a personalized interaction.

That's just one of the findings from our recent study of over 3,000 US consumers. This report gives CX leaders the data-driven guidance you need to deliver personalized interactions across the customer journey—guidance that will result in better business outcomes, achieved faster and without wasting resources on the wrong activities.

Does Personalization Really Matter?

Yes! The data in this report shows how any amount of personalization has some positive impact on Net Promoter Score® (NPS®), CSAT, and effort. But there's much more to the personalization conversation.

Until now, personalization efforts have been misguided and costly because early movers mostly invested in changing agent behaviors to focus on the wrong things. Why? Because companies lacked the necessary analytic insights into when personalization works, when it doesn't, and how to make it have the biggest payoff.

Personalization Defined

In customer care, personalization should be about making attempts to establish an authentic, timely, and mutually beneficial connection with a customer based on what is known about their individual needs and preferences. This intelligence serves as guardrails for each interaction and helps ensure the customer knows how important they are to the company.

Personalization is important, but there are other factors you need to consider to make sure it's effective. Here's what consumers told us:

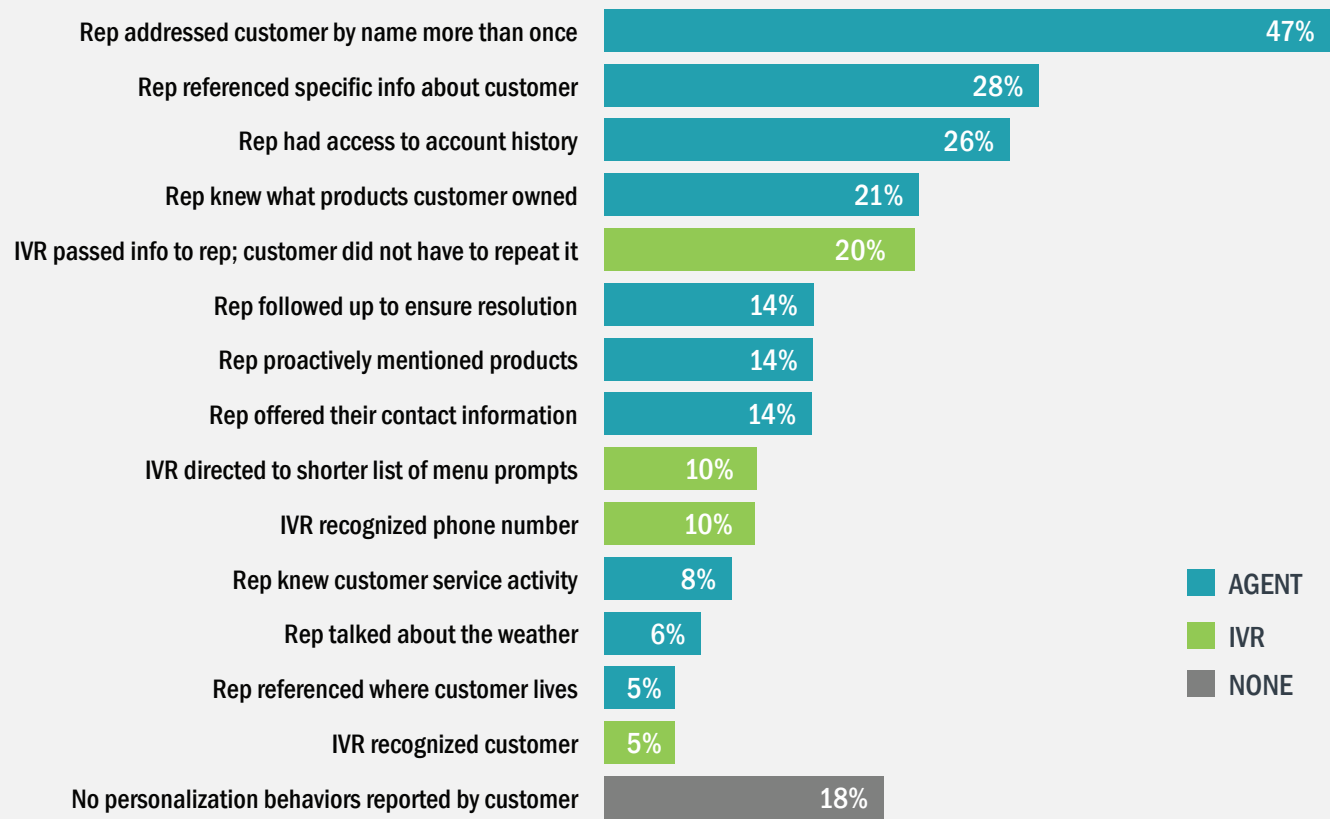
- 1 Personalization doesn't matter if ... *the issue is not resolved.*
- 2 Personalization improves an interaction if ... *it makes a customer feel valued.*
- 3 Personalization can backfire if ... *it gets too personal or adds time to the call.*

In this paper, we'll focus on the current state of personalization practices.

The State of Personalization: What Are Companies Doing Today?

We asked each respondent to identify **how** companies are personalizing service interactions.

Figure 1. Personalization on Call (most recent phone interaction)

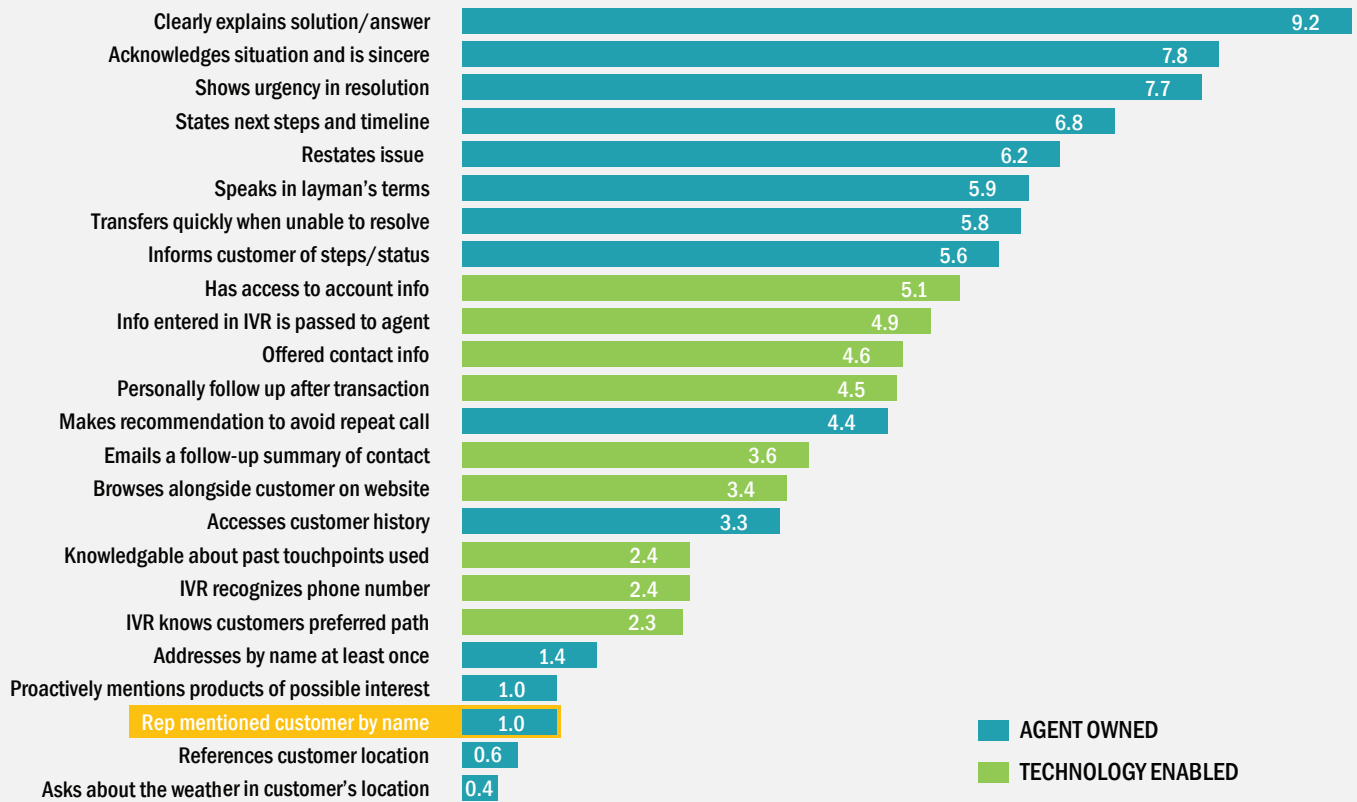


What does the research tell us?

Some form of personalization is happening about 80 percent of the time—but that doesn’t mean it’s being done right. Companies are most frequently trying to personalize by calling a customer by name. But, is this the most important personalization behavior to focus on?

Unfortunately, no. By asking customers to make trade-off choices about which forms of personalization are most and least important to them, we were able to evaluate 24 personalization attributes in terms of their importance to customers (see Figure 2). This analysis showed that mentioning a customer’s name ranks near the very bottom in terms of importance to the customer, as shown in Figure 2.

Figure 2: Personalization Behaviors/Actions (Ranked from most to least important)



Maxdiff Importance Scores (on a 0 to 100 scale)

Clearly, some better guidance is needed to help companies know where to focus resources to deliver the kinds of personalized interactions customers value.

We can start by taking a closer look at Figure 2, where we categorized the personalization attributes into either technology-enabled or agent-owned behaviors. This distinction shows us that some of the personalization factors that matter to customers can be controlled by the agent, while others are enabled by technology. What this reveals is that personalization is not just a technology play, nor just about agent training—companies must pay attention to both to be truly successful at personalized experiences that drive value for customers.

To illustrate this further, let's look at a hypothetical example of a customer calling for an issue with their laptop and encountering an agent that doesn't have access to needed technologies:

AGENT: "Hello, Mr. Smith. Thank you for your purchase. I understand you're having trouble with your laptop. Let's take a look at your computer settings and see how I can best help you today."

CUSTOMER: "No, I've already spoken to someone about my settings."

The same conversation starts off differently when the agent has access to technology that enables a more personal dialogue:

AGENT: "Hello, Mr. Smith. I see you're having some trouble with your Paragon 8S laptop. According to our system, it looks like you've already called a number of times. Is that correct?"

AGENT: "Okay, thank you. I see you've tried changing some of the settings already and re-installed the operating system, but that didn't work. I can walk you through what we'll need to do next."

CUSTOMER: "Yes."

In the second scenario, technology enables the agent to personalize the experience because:

- the agent has access to account history during the call,
- the information the customer enters into the IVR is passed through to the agent, and
- the agent may even be able to see what the customer is looking at online.

Technology can also help further personalize the experience if:

- the agent has technology to schedule and manage personal follow-up with the customer after the call to ensure the issue is resolved, and
- the agent can offer their unique contact information so the customer can contact them directly in the future.

It's the weaving together of technological capabilities *and* trainable agent skills that delivers more individualized customer experience.

How Much Personalization Do You Need?

Our research shows that any attempt at personalization improves satisfaction and effort scores:

Figure 3: Overall Satisfaction With Most Recent Phone Interaction by Personalization Attribute

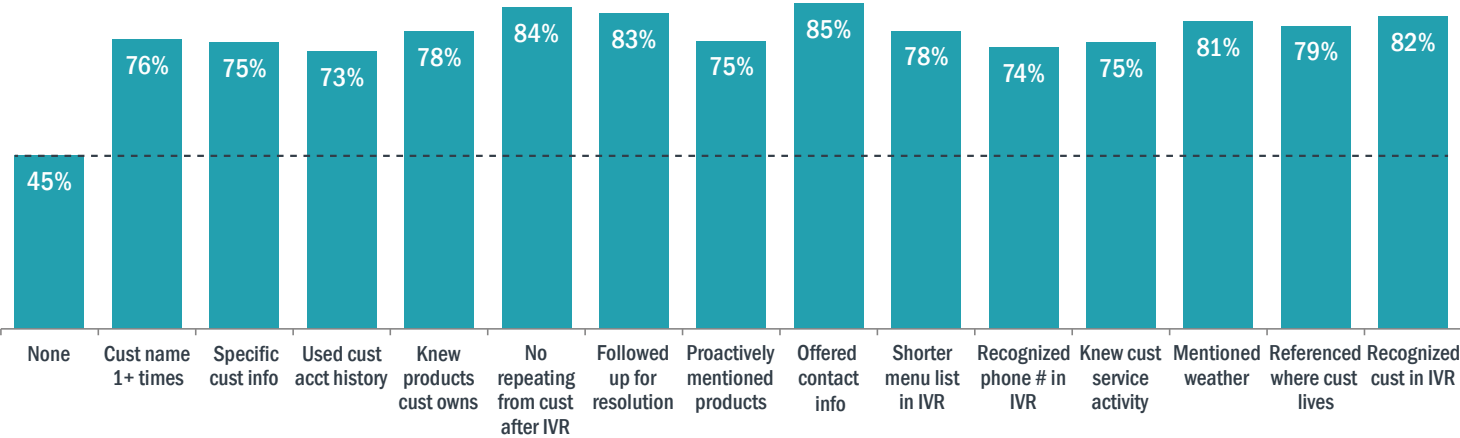
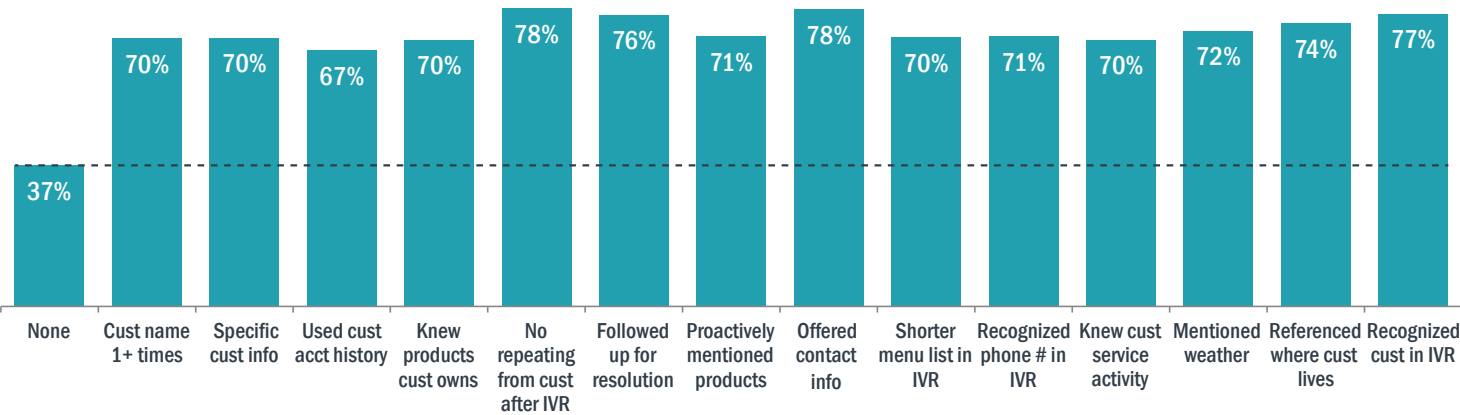
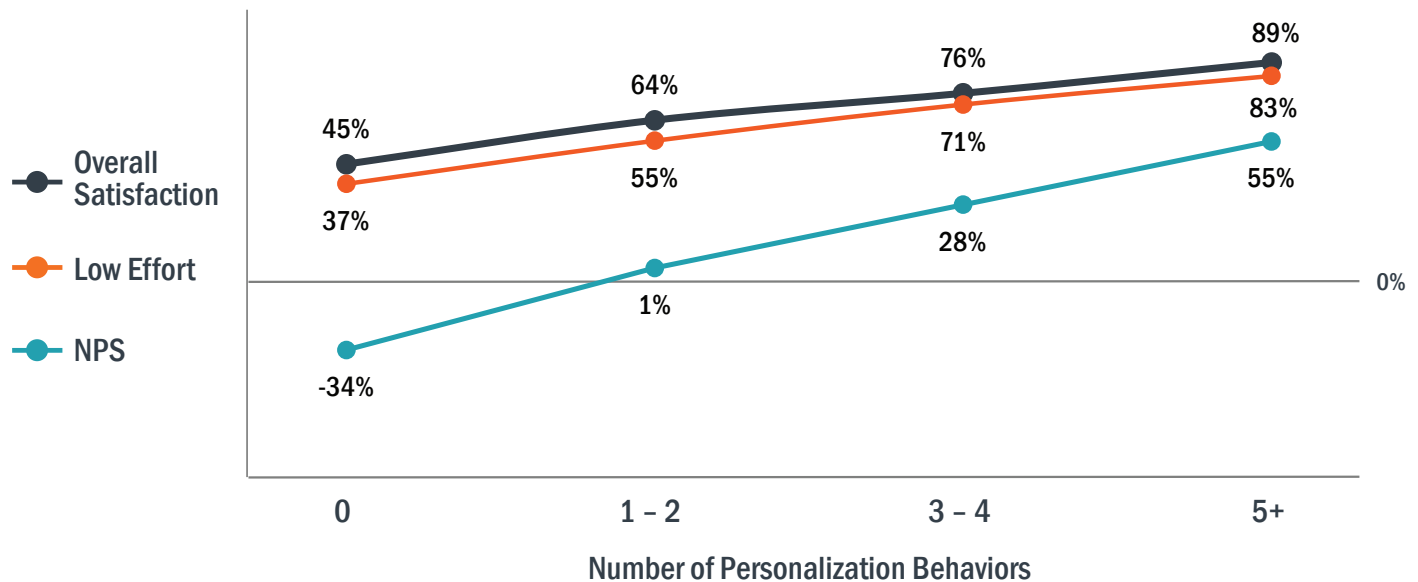


Figure 4: Low Effort Interactions by Personalization on Call (most recent phone interaction)



All key metrics improve as personalization increases

Figure 5: Impact on Key Metrics by Number of Personalization Behaviors Mentioned



Increasing number of personalization behaviors leads to:



Higher satisfaction



Lower effort



Higher NPS


Yet, while any one attempt at personalization can have an impact, more is definitely better. All key metrics improved as the number of attempts increases. Companies that want to make a big impact, therefore, need to invest in a multi-prong approach. Those companies that focus on both enabling technologies and agent behaviors will give themselves more opportunities and methods to deliver more personalization across their customer base.



There's More! Want to See the Rest of the Research?

Click here to watch our video presentation which contains even more insight into personalization from our study.

[Watch Now](#)



Turn this insight into results!

For more on how Convergys can help your organization build the kind of CX personalization that delivers better outcomes for you and your customers, contact us today.

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