

The CX Ops Framework

by  Alphanumeric

The journey to **stake your claim on new markets** and secure the loyalty of your consumers isn't always smooth sailing.

A strong omni-channel strategy that prioritizes **everywhereness and speed** are king and queen.



CX leaders, brand managers, and medical information teams **LIKE YOU** are racing to figure out how to...

- Get accurate information out fast
- Ensure workforce productivity
- Balance channel volumes
- Optimize spend

And digital transformation is the key to the castle.



Here's a framework for you and your CX team to sketch out a strategy with impact.

Remember, where customers reign supreme, loyalty follows.

1 Build your CX Ops team

Nominate a team that can act quickly to create and release content and services for customers and employees at the speed of crisis.

Fill in the blanks below as you identify team members.

A sponsor to navigate approval for the team's plans, including legal-compliance reviews and necessary authorizations.

a. _____

Knowledge owners (content creators, developers, etc.) to build an infrastructure to house information and create and publish content.

a. _____

b. _____

c. _____

A product owner to collect and translate requirements. If your operation supports multiple products, you'll need the product owner for each.

a. _____

b. _____

c. _____

Operational analysts and HCPs to review insights in real time and make recommendations to improve customer and patient experiences.

a. _____

b. _____

c. _____

Legal and Compliance to ensure that you don't get too far along without consideration for key requirements.

a. _____

b. _____

2 Define your North Star.

For centuries, the North Star has guided voyagers through uncharted waters. Define a North Star that lights the way to your desired destination.

When it comes to CX Ops, goals usually distill up into three possibilities...

Get specific about your North Star for each. Prioritize them. Make them measurable and time bound.

When it comes to quality of service, our goal is to _____ by _____.

When it comes to business continuity, our goal is to _____ by _____.

When it comes to cost, our goal is to _____ by _____.

Once you have each of your goals articulated, put them in order of priority in the stars above. Now determine how you'll measure progress.

Set up a regular cadence. Determine milestones and owners and timing for each. Report progress at regular intervals. This means you'll need to know your stakeholders. Think about reporting **UP** and **OUT**.

3 Make a plan to be everywhere your customers are.

What channels do you support today?

Enter the % of volume for each channel you support today. And if you know it, note your NPS _____% and CSAT _____% here.

PHONE

% volume today

% volume tomorrow

SMS

% volume today

% volume tomorrow

EMAIL

% volume today

% volume tomorrow

VIRTUAL ASSISTANT

% volume today

% volume tomorrow

LIVE CHAT

% volume today

% volume tomorrow

WEB FORM

% volume today

% volume tomorrow

SOCIAL

% volume today

% volume tomorrow

FAX

% volume today

% volume tomorrow

SNAIL MAIL

% volume today

% volume tomorrow

Now determine which channels you need to onboard and/or scale by indicating the % of volume you anticipate managing for those new channels and how that might change the % volume on existing channels.

4 Know what's on your customer's mind.

Get your arms around the top 10 issues making up the majority of request volume.

Make note of the therapeutic area and drugs these issues are tied to.

| | What is the issue? | % of ticket volume | Therapeutic Area | Drug |
|----|--------------------|--------------------|------------------|------|
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| 6 | | | | |
| 7 | | | | |
| 8 | | | | |
| 9 | | | | |
| 10 | | | | |

5 Know your customer's journey

See if you can pinpoint in which steps in the journey these issues are showing up. Identify any patterns of friction in the workflow.

Safety, Access, Affordability, Treatment, Support

6 Now start solutioning!

Shift Left

The closer you can shift resolution to the lowest tiers of support, the less costly for you and the more satisfying for your customer.

The magic happens when you combine knowledge management, automation, and self-service.

Take the 10 issues with the highest volume and identify areas for automation and even self-service.

| | What is the issue? | % of ticket volume | Opportunity for Self-Service |
|----|--------------------|--------------------|------------------------------|
| 1 | | | |
| 2 | | | |
| 3 | | | |
| 4 | | | |
| 5 | | | |
| 6 | | | |
| 7 | | | |
| 8 | | | |
| 9 | | | |
| 10 | | | |

 Self-service or AI opportunity

 Investigate for self-service or AI potential

 Requires human intervention

Automate!

1 Automate manual processes in your workflow

Prioritize for impact and level of effort

Start small to gain confidence

3 Build your bot

Identify scripts with common routine tasks

Standardize, so they are performed the same way every time

Ensure regulatory compliance

2 Integrate analytics to predict outcomes and recommend next steps

Use analytical tools to analyze bot data, predict outcomes, and recommend next steps

4 Move to artificial intelligence (AI)

Use self-learning systems and tools

Simulate human interaction within these environments via language, choice, knowledge base, and more

Add the human touch

Now that you've made sure you're showing up where your customers are, how do you connect?

Choice

Authenticity

Personalization

Natural language processing (NLP) plus a rich foundation of lexicon language specific to your industry is required to truly understand conversational intention.

For a personalized, accurate response, you've got to know intent. Many make claims, but the proof is in the pudding.

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With our solutions, we can quickly bring to bear...



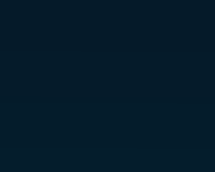
Self-service help centers



FAQ optimization



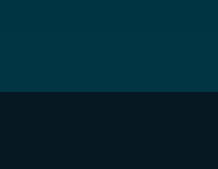
SMS alerts to download key forms



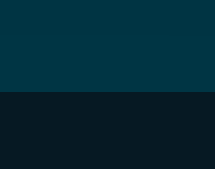
Virtual assistants integrated with platforms like Salesforce and Veeva Vault

At the end of the journey

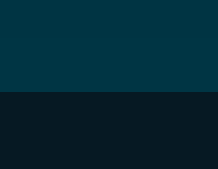
This journey isn't for the faint of heart. But with this framework, you can smooth rough waters and shine light on the most direct route to...



Employees who are happy because it's easy to have impact

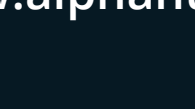


HCPs that can pinpoint info they need instantly



Patients that feel taken care of

In the end, the true measure will be seizing more market share and winning loyal customers. 🏆

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