National Business Midmarket CX Strategy

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AT&T Business

The North Star Customer Experience

High Level Summary

North Star Targets

Gap Analysis

LBGUPS Solutions

Customer Experience

North Star Targets

Investigation of Customer Experience during the LBGUPS journey.

Identified areas of improvement in Online Customer Education, Self-Service sales and business Processes, and Automated Support and Account Services.

1. Make AT&T's array of business solutions readily accessible to potential clients
2. Implement simple self-service processes and automatic bundling.
3. Merge client pre-qualifications into one seamless workflow that applies to all services
4. Aim to create a seamless customer experience that is completely autonomous with little agent intervention or assistance.

Learn Journey Personas

The Technical Expert

TAMIKA

The Technical Expert serves as the organization's technical leader. They understand and manage technical solutions, security, oversee problem solving, and are in tune with the business's technology needs. They also work with The Decision Maker to select the right solutions for the company.

COMMON ROLES

Director of IT • IT Manager
Helpdesk Agent • Office Manager

(L) (B) (G) (U) (P) (S)

EXPECTATIONS

- Scheduling will be done around my business needs
- My timeline will be considered when planning the expected due date
- AT&T will have clear communication with me around the exact status of my order
- I'll be able to track my order, just like I can with UPS

PRIMARY ACTIVITIES

- Assess technology needs within organization
- Understand how solution solves business problems
- Engage with vendors
- Order and track solutions

GOALS & MOTIVATION

- Select the right products to meet organizations needs
- Stay within budget
- Receive products within needed timeline
- Ensure accuracy with what was wanted was ordered and received

CHALLENGES & FRUSTRATIONS

- Select the right products to meet organizations needs
- Stay within budget
- Receive products within needed timeline
- Ensure accuracy with what was wanted was ordered and received

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Steps to Customer Experience
Learn North Star

1

Recognize Need

The potential customer recognizes there is a need for telecom services.

2

Research Topic

The potential customer will defer to a search engine to research offers and capabilities.

3

Advertising & Keywords

Leverage search engine analytics to reach customers who are looking for a specific service. Host detailed pages dedicated to educating the customer on each of all the services offered.

4

Questionnaires

Gather as much data as possible to better customize offers while keeping the experience enjoyable and educational for the customer.

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Steps to Customer Experience
Learn North Star

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Steps to Customer Experience
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5 — Re-Engage

Re-Engage customers at later date while offering incentives to schedule a call for deeper exploration.

6 — Gather Details

Our Trained Associates will Gather Information regarding the potential customer's business in order to gauge the need and Build a Solution that fits.

7 — Customer Education

Share information and Educate the Customer on their Market and any Potential Impacts, Identify their Problem, offer our selection of Tailored Solutions and/or any Upcoming Changes..

8 — Incentivize Bundling

Present any and all Available Solutions to the customer including but not limited to Incentives like Bundling Services for Additional Savings.

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Steps to Customer Experience
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9

10

Empower Customers

Properly Empower Customers with the understanding and Recommendations of what is best suited to their needs while at the same time becoming a Trusted Advisor to the business.

Follow-Up

Even if the customer does not immediately signup, Our Trusted Advisors should always provide the customer with Continued Support during their journey. Offer to schedule a follow-up call or visit in order to maintain an exceptional customer experience.

Tech Saavy

Tech Learning

Tech Hesitant

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Steps to Customer Experience
Learn North Star

Tech Saavy

11 Self-Service Support

Ensure that white-papers for all of the services and packages are readily available online and easily accessible.

12 Usage Calculators

Implement self-service product calculators for customer who would like to preview usage and services cost before moving forward.

13 Videos

Educational videos that answer frequently asked questions regarding products and services should be available.

Tech Learning

14 Chat

Throughout the customer journey, a Trusted advisor that is able to walk the customer through the product research process should always be available via a chat-bot.

15 Tailored Recommendations

Any quotes and recommendations should be accessible either online or on a document to the customer for a designated period of time. The customer may refer to the quote at their leisure.

Tech Hesitant

15 Customer Assessments

Standardize customer assessments on calls assuring that associates have all the necessary details to provide customers with best recommendations.

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Learn Journey Personas

The Decision Maker

DENNIS

The Decision Maker is a key player in choosing the solutions and vendors their business engages with. They may take input and recommendations from staff members, but ultimately, they choose the vendor that provides the best solution and price for their business needs.

COMMON ROLES

CEO • CFO • VP of IT • Owner
Telecom Manager • Vendor Manager

(L) (B) (G) (U) (P) (S)

EXPECTATIONS

- AT&T will understand my business and technology needs
- AT&T will have solutions to help me accomplish my goals When I need customization to my pricing or contract
- AT&T will work with me quickly to meet my deadlines
- AT&T will consider my future business needs when offering solutions, pricing, and contracts

GOALS & MOTIVATION

- Keep the business running
- Stay within budget
- Find the best solution to our technological challenges
- Choose the best vendor to meet our needs

PRIMARY ACTIVITIES

- Learn about solutions
- Understand how solution solve business problems
- Engage with vendors
- Meet with internal staff to evaluate vendors
- Select the best vendor to meet company's needs

CHALLENGES & FRUSTRATIONS

- Technical information that is confusing
- Long sales cycle times
- Inability for vendors to meet my timelines
- Sales agents that lack technical expertise and business acumen

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Steps to Customer Experience Use North Star

1

Real-Time Reporting

Provide customer portal that provides customers with real-time status conditions and is able to predict hardware and network failures.

2

Training Content

Support employees by providing hosted product training videos, content and a customer forum for everyday use and troubleshooting.

3

Agent Service Monitor

Real and AI Agents will provide system monitoring and proactively solve simple issues and notify customers of any potential problems with their service.

4

Self Service Schedule

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Steps to Customer Experience
Get North Star

1

Automated Onboarding

The potential customer recognizes there is a need for telecom services.

2

On-boarding Videos and content

Onboarding can be conducted online via self-service videos and walkthroughs that educate the new customer on services and features.

3

Self-Service Account Setup

Offer self-service initiation of services and support through the get experience. Customers can choose to do it themselves of engage a service agent.

4

White Glove Agent Onboarding

Customer is informed that agents are available to walk them through the account setup process at any point and time they choose. Agents should be prepared to continue support from where the customer started

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Learn Journey Personas

The Influencer

ILANA

The Influencer is a subtle yet powerful voice in their organization. The Influencer can work across any job function, but their experience and recommendation with the vendor carries weight with The Decision Maker when choosing or renewing vendor relationships.

COMMON ROLES

Director of IT • Helpdesk Manager
Contact Center Manager • Legal
Advisor • Accounting Manager

(L) (B) (G) (U) (P) (S)

EXPECTATIONS

- AT&T will make it easier on me to do business with them
- AT&T will consider my needs in all that they do
- If I have a problem, AT&T will work with me to resolve it quickly
- My bill should be easy to understand and pay
- If AT&T makes a mistake, they'll fix it quickly and minimize the impact on my business

GOALS & MOTIVATION

- Keep the business running
- Work with vendors that require the least time and effort so I can focus on my job
- Look after my business's interests
- Make my job easier to do

PRIMARY ACTIVITIES

- Obtains vendor and product information for The Decision Maker
- Approves contracts and vendor requirements
- Plays pivotal role working in departments such as accounting, contact center, operations, or IT
- Evaluates vendor relationship and/or performance and makes recommendations to renew or seek alternatives

CHALLENGES & FRUSTRATIONS

- Vendor processes that harm my business
- Downtime that impacts my business
- Issue resolution takes too long
- Meeting the demands of my job

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Steps to Customer Experience Buy North Star

(1) **(2)** **(3)** **(4)**

Bundle and Save

Leverage customer data already on file for new quotes and proposals while offering additional savings where available

Customer Recommendations

Based on the business profile we can suggest packages that other businesses have subscribed to.

Text Reminders

Confirm scheduled discussions with customers prior to the date and time on calendar. Offer SMS rescheduling to a time and date most convenient to the customer.

On-The-Spot Quotes

Provide quotes that fit the business budget and incentivize immediate action.

AT&T Business

Steps to Customer Experience
Buy North Star

5

Chatbot

A chatbot should engage customers looking for more information that is not readily available on the landing page. An AI agent should collect basic information until a Human connection can be established.

6

AI Sales Assistant

Customers and Agents alike should have access to a Sales Assistant that can quickly develop a customized service plan based off of the customers needs.

7

Self-Service Signup

Customers upon receiving their details customized quote should be able to go through the credit check and sign-up process with as little human help as possible.

8

Digital Document Signing

To make signup easier, our business contract signup process must include digital signing system that allows customers to sign contracts legally while remote.

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High Level North Star Executive Summary

Problem Statement

In 2020, we saw a significant decrease in the amount of business customers who signed up for services with AT&T due to the lack of self-service avenues, confusing information around needs and usage and a lack of personalized options to meet the client needs. Today, LBGUPS customer journey requires a hands-on approach.

Goal Statement

Improve the customer experience for National Business by leveraging all communication avenues including but not limited to digital web, chat, SMS and voice. We want to become Trusted Advisors to our customers and provide them with the North star of customer experiences across all their LBGUPS stages and provide them with the tools they need to make informed decisions .

Steps to Customer Experience Learn North Star

Use Case: Potential Customers Online Researching Telecomm Options

1. Search Engine Optimization - Leverage search engine analytics to reach customers who are looking for a specific service. Host detailed pages dedicated to educating the customer on each of all the services offered. Reach users when it matters most. Increase our reach via Search Engine Optimization, Keyword Marketing and Digital Advertising. Target business looking for telecom services

2. Targeted Search Lead Marketing - If a potential customer is identified via a Keyword Search or Search Engine trigger, a Campaign will be initiated in order to attempt to gather more details and close the lead.

3. Empower Customers - Properly Empower Customers with the understanding and Recommendations of what is best suited to their needs while at the same time becoming a Trusted Advisor to the business.

Steps to Customer Experience Learn North Star

Use Case: Potential Customers on www.att.com looking for a solution for their specific needs

1. Education Tools - Share information and Educate the Customer on their Market and any Potential Impacts, Identify their Problem, offer our selection of Tailored Solutions and/or any Upcoming Changes..

2. Service Questionnaire - Implement self-service product calculators for customer who would like to preview usage and services cost before moving forward.

3. Timed follow-ups and support - Even if the customer does not immediately signup, sales should always provide the customer with Continued Support during their journey via email campaigns that include targeted service education, links to tutorials, and recommended bundles and cost-saving options.

Steps to Customer Experience Learn North Star

Use Case: Potential Customers wanting to put together informative quote for their decision makers.

1. Service Education - Ensure that white-papers for all of the services and packages are readily available and easily accessible via landing page, videos, pdf, chat ai and via phone recording.

2. Customer Assessments – Standardize customer assessments on calls assuring that associates have all the necessary details to provide customers with best recommendations.

3. Usage Calculators - Implement self-service product calculators for customer who would like to preview usage and services cost before moving forward.

Steps to Customer Experience Buy North Star

Use Case: Potential Customers trying to make a decision needs help making decision.

1. Bundle and Save - Leverage customer data already on file for new quotes and proposals while offering additional savings where available

2. Tailored Recommendations - Any quotes and recommendations should be accessible either online or on a document to the customer for a designated period of time. The customer may refer to the quote at their leisure.

3. Chat Bot - A chatbot should engage customers looking for more information that is not readily available on the landing page.

4. Compare Customers – AI Service should have the ability to make recommendations based on the similarities to other company profiles.

Steps to Customer Experience Buy North Star

Use Case: Potential Customers is ready to purchase.

1. Leverage SMS – Confirm scheduled activation of services with customers prior to the date and time on calendar. Offer SMS rescheduling to a time and date most convenient to the customer.

2. Self-Service signup - Customers upon receiving their details customized quote should be able to go through the credit check and sign-up process with as little human help as possible.

3. Single Contract and Credit Approach – Any new contracts should have the ability to share a on time credit qualification for any new customers.

4. Digital Document Signing - To make signup easier, our business contract signup process must include digital signing system that allows customers to sign contracts legally while remote.

5. Set Customer Expectations- Inform customers via email, sign up confirmation or SMS what the next steps be, what communications to expect or what tasks they will need to complete before initiation of services.

Steps to Customer Experience
Get North Star

Use Case: New Customers are looking for a starting point

1. Automated Onboarding – Once customer is qualified for credit and decides to sign the digital contract, a series of automated services will kick off. These processes include, setup of services, delivery of equipment, account setup, ai agent SMS and email communications… etc.

2. Training Videos and Content - Onboarding can be conducted online via self-service videos and walkthroughs that educate the new customer on services and features. Our service agents should have the ability to make recommendations based on the similarities to other company profiles.

3. Self-Service Account Setup - Offer self-service initiation of services and support through the get experience. Customers can choose to do it themselves of engage a service agent.

4. White Glove Agent Onboarding – AI Agents may involve real-human assistance. Whom at any time should be prepared to continue support from where the AI ended. This can be a feature that is offered to top level customers with over high telecom spend.

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Steps to Customer Experience Use North Star

Use Case: Customer experience while subscribed to AT&T products

1. **Real-Time Reporting** - Provide customer portal that provides customers with real-time status conditions and is able to predict hardware and network failures.

2. **Agent Service Monitor** - AI Agents will provide system monitoring and proactively solve simple issues and notify customers of any potential problems with their service. Warnings can be sent via

3. **Equipment Troubleshooting –** Round the clock access to an online support dashboard where customers can troubleshoot and get help their services and devices.

4. **Predictive Account Updates** – After learning how the customer is using the AT&T services, an AI should notify the admin of the account of ways they can save by adjusting usage and services to match their exact needs.

5. **Pro-Active Scheduling** – Leveraging predictive analytics, an AI process should also help customers schedule repairs months in advance before they dispute services.

Steps to Customer Experience Pay North Star

Use Case: Customer experience while subscribed to AT&T products

1. AI Bill Monitoring– Include AI bill monitoring that will inform the customer if usage or account activity seem unusual and do not match previous bills or average usage/activity.

2. Self-Service Billing Portal – Customers may access the billing portal at their leisure to review any charges or usage, etc. for any of their monthly invoices. They are also able to dispute charges which will initiate an automated review of the account activity.

3. Bill Notifications – Automated Proactive billing notifications should be sent to the client via SMS, email and/or account inbox.

4. Digital Bill Pay – Business customers can any invoice pay with the click a button after they have saved their payment method in their portal.

5. Voice Bill Pay & Review – The customer, after automatically being identified via voice AI, can perform any of the bill reviews by phone, as well as SMS, ChatBot or Online Account.

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Steps to Customer Experience Support North Star

Use Case: Long term experience and services for active customers.

1. Service Monitoring – Offer 24/7 predictive monitoring with proactive automation that will notify customers to take action in order to avoid any future issues that may affect their service. Displays real-time status conditions and is able to predict hardware and network failures.

2. Agent Service Monitor - Real and AI Agents will reach out via SMS, Voice or Email in order to provide customers with details and solutions for any potential problems with their service.

3. Changes to Service – Simplify the change to service process for customers. Customers should be able to modify their service,

4. Digital Dispute Filing – Customers will be able to dispute any charges or make changes on the spot to services via the account portal

Customer Experience Guiding Principles

AT&T Business

The BIG10 Customer Experience Design Principles

An inspirational Quote:

1. Know me and treat me like a business. Data powered predictions and personalization to meet my current and future needs.

2. Make me feel valued and in control. Simplified self service digital capabilities with human led opportunities.

3. Save me money. Simplify and personalize promotions and advertising that meet my needs.

4. Let us trust each other. Keep promises made in promotions and sales with simplified and accurate billing.

5. Put me in control of my solution. Simplified through digital and human led experiences.

6. Inform me of what is next and set clear expectations. Standardised communications and tracking for mySolution.

7. Give me One AT&T. Integrated policy and experience across channels, products and functions to eliminate all friction points

8. Make me more efficient. Automate manual tasks and give me one support channel for mySolution

9. Help me grow. Adopt as mySolution needs evolve while remaining consistent to eliminate new friction points.

10. Educate me. Give me space to learn and iterate with others.

AT&T Business

The BIG10 Customer Experience Technology Principles

An inspirational Quote:

1. We are informed and aligned by the desired end to end Customer Experience.

2. We design from the inside out, focusing first on AT&T operations which enable a product agnostic, omni experience regardless of channel.

3. We enable maximum shared value between AT&T and our Customers by connecting everything we do from Branding to Billing and Day 2 Support.

4. We align our transformational work to a common set of products in a solution set as defined by Marketing & Sales.

5. We take the time to do qualitative and quantitative problem discovery before we build target architecture solutions.

6. We align our solutions with the Customer Performance Indicators.

7. We support iterative development, prototyping, testing and repeat solution delivery.

8. We build in modules, balancing fixed and flexible variables so that our solutions adapt easily to meet the Customer's needs.

9. We commit to ensure that Customer Experience initiatives are priority in all the work we deliver.

10. We commit to ensure that the visible customer interactions integrate with the invisible experience elements to remove all friction.

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