

**RingCentral**<sup>®</sup>  
ENGAGE DIGITAL™

# Digital Customer Engagement Selection Guide

This guide will provide you with a step-by-step approach to finding the right digital customer engagement platform for your company.

Learn how to create a world-class customer experience and profitable, lasting relationships with customers by implementing a solution that **connects you with customers wherever they are online**. Read on to discover:

- What is a digital customer engagement platform?
- Why should you support digital channels?
- Top 5 questions to ask stakeholders when defining your needs
- How to identify feature requirements

# WHAT IS THIS EBOOK ABOUT?

## What is a Digital Customer Engagement Platform?

A **digital customer engagement platform** is a centralized hub to manage interactions with your customers across all digital channels: messaging, social, live chat, in-app messaging, email, online reviews, and others.

Ideally, this omni-channel platform will be intelligent. It will aggregate and analyze communications from all channels to give your agents the real-time information they need. It will use AI to respond to inquiries automatically and, when that isn't possible, transfer the customer to a live agent.

The right customer engagement solution will also scale easily, quickly adding support for the new digital channels your customers will no doubt be using in the future.

In short, the right solution can help you increase customer satisfaction and ultimately boost revenue by helping you strengthen your brand's relationships and trust with customers.

**THE  
THREAT  
IS REAL.**

# So is the opportunity.

10%

Omni-channel customers spend more online than single-channel customers. For every additional channel they use to connect with a business, customers **spend more money.**

3 out of 4

consumers say they're **more likely to make a purchase** from a company that knows their name and purchase history and recommends products based on their preferences.

56%

of CEOs who have made digital improvements to their customer service say those moves have led to **revenue growth.**

## Digital customer engagement is a must-have

Creating an intelligent fully integrated infrastructure for digital customer engagement can provide your company a strong competitive advantage today—because many businesses still haven't adopted this technology yet.

As these stats from a 2019 Forbes report made clear, whether you view it as addressing a threat or seizing an opportunity, implementing a digital customer engagement platform is quickly transitioning from a nice-to-have to mission-critical.<sup>1</sup>

1/3

of consumers who stopped doing business with a company last year did so because the experience wasn't personalized enough.

71%

of consumers want a consistent experience across all channels, but only 29% say they actually get it.

22%

Only 22% of consumers believe the average company provides a good mobile experience.

<sup>1</sup> Forbes: 40 Stats on Digital Transformation and Customer Experience (2019)

# What's the right platform for your company?

Before you sign up for a solution, it's important to identify the strategic objectives you'll want this platform to help your business achieve. It's also important to think through not only your company's current needs for a customer engagement platform but also how those needs might change over time.

You don't want to invest in a platform that can handle your current volume of customer interactions but fails to scale with you as your operations and customer base grow. We suggest gathering all relevant stakeholders across the company to discuss your business goals for an engagement platform—both today and in the future.

## TOP 5 QUESTIONS FOR YOUR STAKEHOLDER DISCUSSION

- 1 What channels are our customers using in their daily lives?**  
Does the data suggest they want to communicate with us on those channels if they could? Will this benefit us?
- 2 How many digital customer service reps do we have?**  
Will an AI-based engagement platform make our reps more productive, and could we reduce hiring as a result?
- 3 What are the risks of not implementing such a platform?**  
Will we lose ground to competitors? Market share? Could it hurt our reputation?
- 4 Can we find an engagement platform now that's scalable?** Will we have to implement one solution today, only to migrate to a larger, more sophisticated platform as we grow?
- 5 Can we find a platform that works with our support stack?** Will the platform integrate with existing apps, or will it be another standalone environment our team has to monitor?

# Get specific.

When you and your stakeholders have identified your current and future business goals for a digital customer engagement platform, you can prioritize the specific functionality you'll want from your solution.

Here are some of the most important features to look for:

<b>Productivity features</b>	A single-agent desktop with suggested knowledge base replies to respond consistently to customers on any digital channel — without having to switch between windows.	Automated smart assignation so customers are sent to the agent with the right skills to resolve their issues.	CRM integration with Single Sign-on to unify all conversational and transactional information into a single window without an additional login.	Live analytics for enhanced supervision.
<b>Digital identity merge</b>	Consolidate multiple profiles across accounts (for example, Twitter and Facebook) into a single identity.	Improve resource handling and eliminate duplicate interactions.	Complete view of historical customer issues for more personalized responses and faster resolution.	
<b>Machine learning and AI</b>	Classify and route messages automatically to the most relevant agent based on urgency, skill, and context.	Recognize multiple languages.		
<b>Reporting and analytics</b>	View key business outcomes at a glance (for example, total interactions across channels and agent performance) and improve KPIs.	Identify brand ambassadors and detractors so your team can respond accordingly.	Make informed decisions on digital channel investments.	
<b>Open platform and integrations</b>	Use APIs, webhooks, and app SDKs to connect your engagement platform with your other support and productivity apps.	Allow data to flow consistently to your CRM, BI, chatbots, etc.		

## Review your data to learn what matters in an engagement platform:

- What percentage of our inquiries actually require a synchronous response?
- How many channels does the average customer use to communicate with us? Has this increased?
- How much time are our agents spending switching among channels (chat, email, social)?

TIP



# Time to review vendors head-to-head

After you've identified the most strategically important features and functionality for your digital customer engagement platform, you will be ready to start investigating and comparing vendors' solutions.

**Warning:** In addition to keeping in mind the potential for future scalability as you investigate engagement platforms, you will also want to make sure the solution you choose is highly customizable.

Every business's support needs and priorities are unique—and even within an organization they can change over time. So you want to make sure the solution you select can be tailored to your needs and goals and adjusted when you need it.

With that in mind, **here's a strategy to help you narrow your search** and find the best engagement platform for your company.



# PREPARE FOR THE DIGITAL AGE

## **Congratulations.**

You conducted thorough due diligence, found the right customer engagement platform for your business, and deployed it.

After a few months of operation, we suggest you take a step back, review the platform's performance, and check to see if it is meeting the metrics your team set for it. Periodic evaluations help you monitor customer service quality and overall productivity, and these evaluations serve as a guide to continuously improve performance.

Providing a great experience across every digital touchpoint is critical for your company's success. At RingCentral, our own research finds 95% of customers expect to easily reach a customer service rep by any channel. Businesses that invest in omni-channel customer engagement have an average customer retention rate of 89%.

**The cost of doing nothing is high.** Make sure you're prepared for the modern digital age.

# WE SPEAK DIGITAL

RingCentral Engage Digital is a customer service platform for every digital interaction. Schedule a demo today, and see how you can take your customer service strategy to the next level.

[REQUEST A DEMO](#)

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