WHEN BAD THINGS HAPPEN: GET PROACTIVE
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TIME FOR ACTION

Despite your best intentions, things don’t always go according to plan. Failing to adequately communicate during emergencies and unexpected events means risking potentially irreversible damage — starting on social media and ending at the bottom line. These situations make timely and helpful communication more important than ever.

Unfortunately, moments like these also create the most stress, making it difficult to quickly pull together a rational response. Walk through this communication kit whenever bad things happen to make sure you cover all your bases, contact the right people and send the most relevant content.
KNOW YOUR AUDIENCE

Content will vary by channel and audience, as well as the type of situation you find yourself in. Whether you’re responding to an emergency, outage or an unplanned event, there are generally three types of people you need to reach out to:

The CURIOUS Customer
These people are not directly impacted by the situation, but they are aware of the incident and will call your contact center to find out what’s going on. They may care about:

- What happens after a data breach, even if their accounts were not impacted
- Loss of power in a nearby neighborhood
- Upcoming sales at an under-construction store on their side of town
- Comments from friends about poor service

After the fact, consider sharing success stories with the rest of your customers, who use your product or service but are too detached from the current situation to know or care about what is happening. This may help them trust you during future incidents, but make all other customers your first priority.

The UNAWARE Customer
These people are usually customers who don’t know something has gone wrong, but the incident could cause them direct harm, discomfort or personal stress. They have low awareness but high impact and might be affected by:

- An incoming storm
- Flight delays impacting their favorite airline
- Changes in business operations
- Digital security breaches that affected their data

It’s never a good idea to keep customers in the dark. Sharing information about potentially harmful events — or even embarrassing ones — raises trust and improves the overall customer experience.

The WORRIED Customer
Worried customers are highly aware of the situation and are experiencing high impact. These customers need to take top priority in your response plan. Customers may become worried during:

- Power outages
- A website crash
- Interruptions in service
- Natural disasters

Learn more about how to Reduce Call Center Volume from These Types of Customers.
SET YOUR PRIORITIES

In some situations, your contact center may be receiving calls from all three types of customers. When that happens, allocate your resources to high-impact-high-awareness calls first based on the Proactive Communication Priority Curve.
In the midst of an emergency, outage or unplanned event, you’ll have lots of points of contact to keep up with, all asking different questions. Think you can identify which customers to prioritize first?

Here are nine common questions and statements your customers might say during an unexpected event or emergency situation. Can you tell which ones are CURIOUS, UNAWARE or WORRIED?

1. “The snow’s not that bad. I’m sure my order will get here in time.”
2. “How long will it be before my power is turned back on?”
3. “My brother got an email saying his account was hacked. Is that going to happen to me?”
4. “Can you refill my prescription before the store closes?”
5. “I saw what happened on the news. Is there anything I can do to help?”
6. “I think the bank is still open, so I’ll leave work early today to deposit the check.”
7. “Are you going to have a grand-opening sale after construction is finished?”
8. “Will my T.V. service be fixed before the game starts?”
9. “I wish they would have told me my flight was delayed.”

Ultimately, it doesn’t matter what situations you believe require a response. It matters what your customers believe, and if you don’t keep them informed, they will be flooding your contact center. So step into your customers’ shoes and consider how you can make the situation more bearable.

And remember to proactively ask customers to opt-in to notifications, so when issues do arise, you’ll be armed with consent and contact information.
BEST PRACTICES BY CHANNEL

Proactively communicating with customers through their preferred channels is a proven way to decrease inbound calls while freeing resources to focus on other high-priority operations. Leverage these best practices to optimize interactions across every channel.

Outbound Voice Messages
- Before calling your customers, make sure you are following compliance regulations
- Read your script aloud before recording to monitor pauses and reduce mistakes
- Repeat phone numbers, street addresses and website addresses so customers are sure to get the information they need
- Limit menu options to three or four
- Use consistent verbiage across communications (e.g., customer service representative vs. agent)
- Review the message before sending to customers

Email
- Before emailing your customers, make sure you are following compliance regulations
- Include an attention-grabbing subject line
- Keep emails concise
- Large files should be hyperlinked in lieu of oversized attachments
- Provide clear contact information
- Emphasize important information through text formatting such as bolding or underlining key content
- Break content into short, easily digestible chunks
- Proofread before sending out

Text Messages
- Before texting your customers, make sure to follow compliance regulations — have their consent to text, and adhere to key words like “STOP” to remove them from receiving future texts
- Keep your messages concise and to the point (character limitations)
- If you offer one-way text in place of two-way, be sure to convey important information clearly and efficiently
- Provide the ability for the customer to receive additional information based upon keywords or agent assistance
- Provide contact information

Social Media
- Twitter updates should be under 280 characters and link to a website
- Use storm designated hashtags in Tweets and personal messages
- Post useful information
- Respond to all complaints and questions in a timely manner
- Responses should only be positive or provide additional contact information

Whatever channels you choose, streamline your CX by sharing customer data across every channel, regardless of technology vendor. Aggregating all your data is the best way to get a 360-degree view of agent and automated interactions to better understand the customer journey.
**SEND THE RIGHT MESSAGE**

From utilities to travel, proactive communications is important in all industries, but the way they respond to unexpected situations may vary. Therefore, connecting with them begins with onboarding. Do you know your customer? Do you have the most current demographic data and contact information? Looking at the entire journey, this is where some fall short.

After collecting contact information and encouraging your customers to opt-in to receive messaging, check out the following scenarios, spanning six industries, to show how proactive notifications and other strategies could help maintain or improve your CX, ease minds and significantly reduce inbound calls during each event.
INCOMING STORM | UTILITIES

In rural Pennsylvania, an early-morning winter storm dropped 10 inches of snow on a sleepy town. Stressed under the weight of the heavy snow, one mile of aging power lines collapsed to the ground, cutting power to 1,500 homes. Realizing the dangerous combination of sub-zero temperatures and out-of-service heaters, the local utility company springs into action to find a way to restore power to all the affected customers. Still, the outage could last for a couple hours, so it's time to let people know what happened.

Industry-specific Things to Consider

- Some utilities don’t send updates during blackout windows — like late at night when most customers are sleeping — but the cold weather makes this occasion an exception
- Most utilities are heavily regulated, so it’s important to keep government officials updated every step of the way
- Most utilities send updates when dispatchers give restoration estimates, but if the restoration time is unclear, send a message to acknowledge the outage and let customers know what is being done to fix it

Situational Best Practices

1. Plan proactive messaging to send before, during and after a storm, beginning at least a day or two before it hits to give customers time to prepare
2. Have the right tools and processes in place to handle an influx of inbound calls
3. Tell customers about emergency shelters or other emergency assistance
4. Consider a partnership with another organization to handle high call volume

See how one company reduced call volume and saved $1 million in agent support thanks to proactive notifications and automation during Hurricane Matthew.

Check out another ebook we put together to give utilities even more advice when communicating before, during and after a storm.
WEBSITE CRASH | RETAIL

At 11:54 p.m., just six minutes before Cyber Monday, a nationwide retailer’s website crashed. For the past two weeks, the retailer had been promoting a 24-hour, online-only sale, set to begin at midnight. Initial estimates pegged the sale to attract 10 million online visitors before the day was over. Now, with no clear solution in sight, the retailer is worried their typically loyal customers would go to a competitor instead. The retailer decided to extend the sale for another 24 hours, but it had to get the word out before the buyers took their business elsewhere.

Industry-specific Things to Consider

- **Retailers may have a limited supply of any product at a given time. Customers know that, so in high-stress sale situations, they’re quick to make a purchase wherever they can find it**
- **The retailer’s level of specialization and amount of competition will dictate whether they call your contact center for a solution or simply move on somewhere else**
- **Retailers often have contact information for their most loyal customers — cardholders — which provides a better chance of salvaging the most valuable transactions**

Situational Best Practices

1. **Notify customers as soon as the crash is discovered, and use SMS to send a coupon, giveaway, etc. to give customers a reason to wait or alleviate bad feelings**
2. **If your webchat is linked to your website, have other channels available to send proactive notifications and answer inbound concerns**
3. **Give customers an estimated restoration time, if available, and send another message as soon as the website is back online**
4. **Remind customers about other channels or physical locations if they need your product or service immediately**
As a massive hurricane approaches a major metropolitan city, forecasters predict record amounts of flooding that could leave people stranded in their homes for days. A nationwide pharmacy provider decides it’s time to close several locations in the area for the safety of its employees and customers. But the pharmacy doesn’t want to leave anyone stranded without potentially life-saving medication.

**Industry-specific Things to Consider**

- You will likely have a spike in customers refilling their prescriptions, so have self-service options in place wherever possible to let pharmacists focus on refills rather than taking calls.
- Know what you’ll tell customers who need medications that can’t be immediately filled, and proactively provide other locations where prescriptions can be picked up.
- Retail pharmacies supply more than medications, so consider stocking up and promoting severe weather supplies like flashlights and blankets.

**Situational Best Practices**

1. Send your first message one or two days before closing to give customers time to get to the store and reduce last-minute stress on staff.
2. Give customers a specific closing time, the reason for the close and, if possible, when the store will reopen.
3. Direct customers to your website or another channel, like SMS, for automated service.
4. If you didn’t provide a reopen time in your initial communication, send another notification after opening again, possibly with a digital coupon via text message to foster good will.

Check out how this pharmacy sent proactive messages before Hurricane Harvey to prepare customers before disaster struck.

For examples of messages every pharmacy should be sending, check out this graphic we created to help pharmacies create connected experiences at every point in the customer journey.
SERVICE DISCONNECTED | CABLE & SATELLITE

Two million people turn on their TVs moments before a highly anticipated event begins on pay-per-view. But instead of seeing the familiar sportscasters, all that comes up is a blue box that says, “Searching for satellite signal.” A few viewers head to the roof to check the dish, but far more reach for the phone to seek help from customer service. The television provider knows what went wrong and is working on a solution, but it needs to ease the minds of all its viewers.

Industry-specific Things to Consider

- **Active television viewers know exactly when something goes wrong and are quick to call for a solution, so a fast proactive response is key.**
- **Unlike retail, T.V. subscribers can’t just watch the program with another provider, but a bad experience could cause them to switch down the road.**
- **Modern-day viewers watch shows from everywhere, so don’t assume everyone will be waiting by a landline — try calling or texting their cell phone instead.**

Situational Best Practices

1. **Begin your response by sending a proactive notification acknowledging the issue.**
2. **Have enough contact center agents on duty to handle the increased complaints coming from all channels.**
3. **Consider how the disconnection will affect your outreach — if you’re a telephone service provider, don’t call your customers.**
4. **After service is repaired, make it easy for customers to test their own devices and get in touch with you if something isn’t working.**
FRAUDULENT ACTIVITY | FINANCE

Security officials at a top credit card company detect potentially fraudulent activity on one customer’s account. The cardholder lives in Arizona, but a $1,200 purchase was made at a rug store in Eastern Europe. Recognizing that the cardholder has never left the country before, the credit card company flags the transaction and decides to ask the cardholder to either approve or deny the purchase.

Industry-specific Things to Consider

- Customers may have several credit cards, so clearly state which account was affected in your opening message
- SMS is not secure, so don’t send any sensitive account details through the texting channel
- Many consumers suspect voice messages from banks to be scams, so send a text notification allowing them to instantly approve or deny the transaction

Situational Best Practices

1. After receiving a fraudulent-activity message, customers will often ask what they can do to avoid this in the future, so reduce inbound calls by answering this question proactively

2. Use outbound notifications to direct customers to a website where they can change their password, get a new credit card, receive updates, etc., so agents can focus on being trusted advisors and handle breached accounts

3. Set up a plan to proactively contact customers in the long run if any more suspicious activity is detected

4. If a customer approves the transaction, update your customer data to avoid flagging similar transactions in the future
DELAYS | TRAVEL
As thousands of travelers prepare to venture across the East Coast and Southern United States, heavy fog in Atlanta has caused all airlines to temporarily shut down. The fog is expected to clear in a couple hours, but with no flights in or out of the airport, the weather is causing delays across the country. One airline is trying to make sure all its passengers still get to their destination on time or at least make their situation a little more comfortable.

Industry-specific Things to Consider
• Customers may be flying from the other side of the country, where the weather is fine, so be clear about why a flight has been delayed
• Consider whether it’s more beneficial to reroute a customer or just delay the current flight
• Customers have many choices in airlines, so sending a special gift via text could inspire loyalty

Situational Best Practices
1. Whether it’s a rock concert, webinar or limousine pickup, customers expect things to go according to schedule, so send an updated time to help them plan ahead
2. Be honest and acknowledge the situation through a channel that matches the customer’s needs, like sending a text message to someone in a loud, busy airport
3. Provide constant updates across all your channels — voice, webchat, agents, email, SMS, etc.
4. Suggest other options, like taking another flight or provide a coupon to one of the airport restaurants, and send the new boarding pass, ticket, etc. directly to his or her phone via SMS
PLANNING FOR CX SUCCESS

When it comes to creating exceptional experiences, getting proactive is the best way to “wow” your customers. By incorporating multiple channels—including voice, SMS, email and others—into your CX strategy, you can turn unexpected events into major CX wins.

But exceptional CX isn’t created with a single text message. It requires an iterative process that starts with connecting underlying CX technologies, enhancing them through continual optimization, then shifting to ongoing orchestration within a comprehensive CX ecosystem.

By continuing to adapt your organization’s proactive communication strategies, your business can provide maximum benefit to customers, raise your reputation and increase customer loyalty—even when things don’t go according to plan.
WHEN BAD THINGS HAPPEN: BE PREPARED

When disaster strikes, it’s best to already have an action plan in place. That includes your messaging. When you need to respond quickly, you don’t want to spend time worrying about what information to share.

While every situation requires some personalization, here are a few examples of text and voice messages you could send to kick off your proactive response.
Hello, this is ABC Retail. Due to a logistical error, your order #12345 for [ITEM NAME] has been delayed. Your package will arrive on Dec. 4 or 5 at [ADDRESS]. We apologize for this inconvenience. Please direct any questions to 1-800-555-6789, or press “1” to speak to a client service representative. Thank you for shopping at ABC Retail. To hear this message again, stay on the line.

ABC SHIPPING: Your order #12345 has been delayed. It will arrive on Dec. 4 or 5. Please call 1-800-555-6789 with any questions.

XYZ CABLE ALERT: An outage has been reported in your area. We expect this to be resolved by 4 p.m. For more info, go to cab.le/xXX1yy.

This is XYZ Cable. An outage has been reported in your area due to a damaged utility pole. Our team is working to resolve this issue, and we expect your service to be restored by 2:30 p.m. Please visit xyzcable.com for more information. Thank you for your patience. To hear this message again, stay on the line.
FINANCE

This is ABC Bank calling for [CUSTOMER NAME]. We have identified a potential data issue that may affect your account #123456. This may have included your name, email address, home address, phone number and the last four digits of your credit card number. For more information please visit abc.bank.co. Thank you. To hear this message again, stay on the line.

TRAVEL

REMINDER: Your flight to JFK departs at 7:15 a.m. tomorrow. Higher-than-usual airport traffic expected, so arrive 2.5 hours early.

Hello, this is XYZ Airlines. Your flight is scheduled to depart for JFK International Airport in New York at 7:15 a.m. tomorrow. Due to holiday travelers, we expect airport traffic to be higher than usual. Please plan on arriving at the airport two-and-a-half hours before your departure time. Thank you for using XYZ Airlines, and enjoy your flight. To hear this message again, press ‘1.’
ABOUT WEST

West delivers communication solutions that help brands create connected customer experiences. We have 30 years of experience strategically improving customer interaction, enhancing productivity and increasing profitability, with clients in healthcare, education, utilities and diverse commercial industries. West Interactive Services solutions include IVR & Self-Service, Proactive Notifications & Mobility, Cloud Contact Center and Professional Services.

Learn more at west.com/interactive.