

Customer Experience Management: A Software Checklist



An effective Customer Experience Management (CEM) program certainly won't run itself. Your strategic planning, program governance structure, and change management efforts go a long way toward building your success. But you also need robust CEM software to support your work. Remember, even if your program is in its early stages now, it will grow and evolve, as will your company. To scale your program – and your success – choose the right software to support your long-term needs. If your program is complex, strong CEM software can introduce efficiencies and insights that delivers results.

Here's a handy checklist for **5 must-have capabilities** of strong CEM software.

1

A real-time, complete customer view

Missing a piece of the puzzle when it comes to CX? Make sure you fill the gaps by ensuring that your system combines direct feedback, indirect feedback, and operational metrics to reveal a complete picture. Then keep close tabs on how well your interventions and innovations perform.



- Collect direct feedback that's real-time and omnichannel
- Get meaningful feedback with smart deployments – make sure you're sending the right survey with the right questions at the right time.
- Never miss a beat with indirect feedback
- Uncover hidden insights with interaction analytics
- Tie it all to operational data – for context

2

Deep organizational engagement

Employees at every level crave insights about the customer experience. Be a hero: Deliver role-specific charts, dashboards, and reports to give them insights they can't get anywhere else. Drive employee action with workflow management and collaboration tools. They're your key to boosting engagement with CX.



- Deliver the right insights to the right people with role-specific dashboards and reporting
- Use sophisticated workflow capabilities to promote employees to take the next step, and guide them in the right direction
- Get expert guidance to drive action and program engagement

3

Purpose-built analytics

Start with adaptive, battle-tested algorithms, then add AI and machine learning. What do you get? Unparalleled insights into the customer experience, from root cause to trending topics to correlation and beyond. Enable yourself to instantly slice and dice to your heart's content. Now you've got insights that inspire improvement and innovation.



- Insights are only as good as the analytics that generates them – make sure you are generating insights that drive performance
- Get everyone working towards the same goal with collaborative reporting
- Take prescriptive steps to improve outcomes with smart planning

4

Agile self-service tools

Crave control? Make sure you have the tools to build and manage an adaptive customer experience program. With drag and drop ease, you want to deliver: configurable templates, best-practice libraries, powerful admin tools. Even end users should be able to filter and explore on the fly. That leaves you free to focus on strategy and planning.

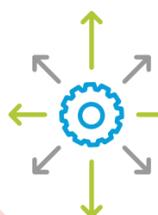


- Take advantage of powerful controls to keep setup and management in your hands
- Drive action across the organization with configurable reports and dashboards
- Ensure accountability with configurable workflows

5

Easy, comprehensive integrations

Even the most robust system can only go so far if it doesn't play well with others. The best CEM programs take advantage of powerful operational alignments. Find a system that allows you to access other core information (like call data) without jumping through hoops like partner integrations or third parties.



- Think long term – you might only need one capability now, but do future-you a favor
- Make sure your program can easily integrate with others that you will need in the future
- Find a “Swiss army knife” solution like the NICE Portfolio – right now you might only need the knife, but if you ever need the screwdriver, it's there. No need to run back to the hardware store or rummage around your toolbox.

Get in touch today to learn how NICE Satmetrix can support your CEM program.

[Request Demo](#)