
e-book

Strategies for building customer engagement during COVID-19





introduction

We have recently found ourselves in strange times, a global pandemic. And during this difficult time, our thoughts are with those who are impacted by the virus. While global government, health, and nonprofit communities are working together to stop the spread of COVID-19, Twilio has been looking for how to best help people affected by the virus and keep each other safe.

Communication plays a critical role in how organizations distribute public health information, keep constituents up to date on a continually evolving situation, and provide quality care. Digital tools and on-demand infrastructure can help organizations rapidly and cost-effectively scale response, as well as iterate quickly on what's working best to serve constituents.

Twilio also works with customers across the globe to advise them on how to maintain strong customer engagement through these difficult times. Many fundamental best practices remain, but it's important to calibrate them to suit the situation.

We understand it is difficult to keep "business as usual" in this unusual world. Businesses face challenges, including practicing social distancing to ensure the safety of all employees, activating business continuity plans, and adapting to office closures and remote work. There are many questions as to how businesses can continue to support and engage their customers while operating differently, how they can help prepare and support their frontline contact center teams, and others. This ebook will share some strategies that we use to advise our customers which may serve helpful as your business looks to adapt customer engagement during the COVID-19 situation.

It is a stressful time for all and this is the time to walk the talk. It is time to consider opportunities to support your customers. Whether there is a clear and direct way for your organization to help, or whether it requires some creativity, COVID-19 represents an opportunity for your business to demonstrate that you care in tangible ways.

To be clear, we are not asking businesses to be opportunistic in making money. On the contrary, it is important to think about how your business can demonstrate that you care for your customers and employees alike, exercising kindness, compassion and empathy to all. Afterall, we are all in this together.

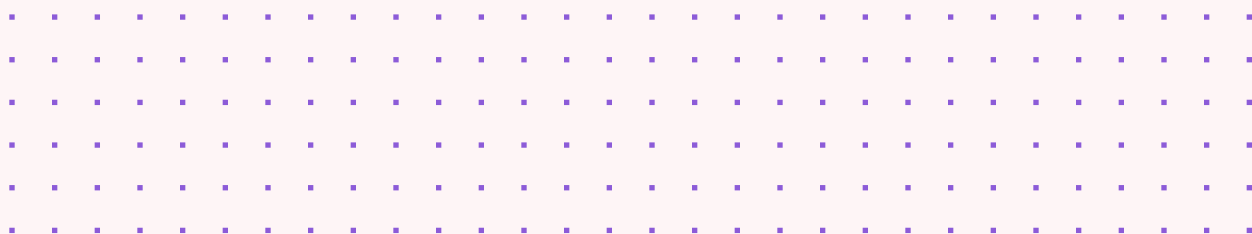


About Twilio

Twilio is a communications platform as a service company based in San Francisco, California. For more than 10 years, Twilio has empowered global brands and non-profit organizations to increase customer engagement through APIs and services. These APIs and services, and more recently complete solutions such as the Flex Contact Center and SendGrid Marketing Campaigns, abstract away much of the complexity inherent with communications.

By taking a software platform approach, the Twilio Customer Engagement Platform provides a layer of agility across traditional hardware-based telecommunications infrastructure and networks. Developers and businesses building atop the platform, inherit improvements and gain access to new engagement channels, intelligent services, compliant access to new geographical regions, and new features without having to spend time in rebuilding existing applications, managing servers, or engaging specialist consulting partners to build costly and complex integrations.

More than 172,000 customers use Twilio Customer Engagement Platform to create a differentiated experience for their customers to help drive higher sales conversions, increase NPS scores and customer loyalty, and improve contact center efficiency.





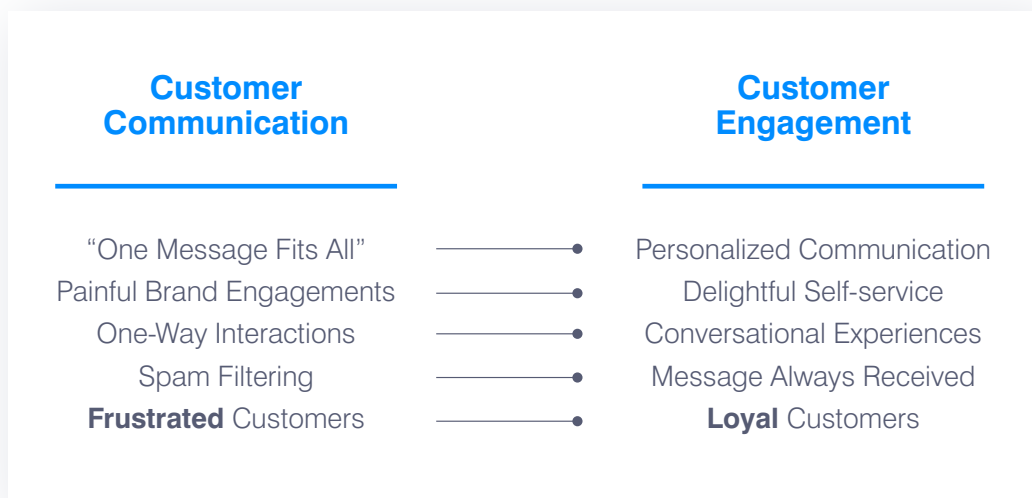
What is customer engagement?

Customer engagement is often defined as a connection between an organization with an external stakeholder or customer through one or many channels of correspondence. Many connections and interactions, whether online or offline, comprise the overall customer experience.

It's not just important what and how you communicate, but how you make your audience feel when you do it. In times of emergencies, businesses have the opportunity to instill greater confidence through how they exercise care towards their customers.

Customer engagement and Communication

Customer engagement and communication are intertwined, but they are not the same.





Communication can be generic, while engagement should be personalized, demonstrating that you know your customer. Communication can entail painful brand engagements, instead of delightful experiences. This is the difference between waiting on hold for help and getting instant help through self-service platforms, such as bots. Communication can sometimes be one-way, while engagement allows for users to respond and have a conversation. Generic communication could feel like spam and get filtered out, while engagement entails trustworthy communication that will be well received. **Importantly, good engagement helps build trust with your customers, which leads to loyalty.**

Great customer engagement is personalized, relevant, timely, delightful and trusted.



Personalized



Delightful



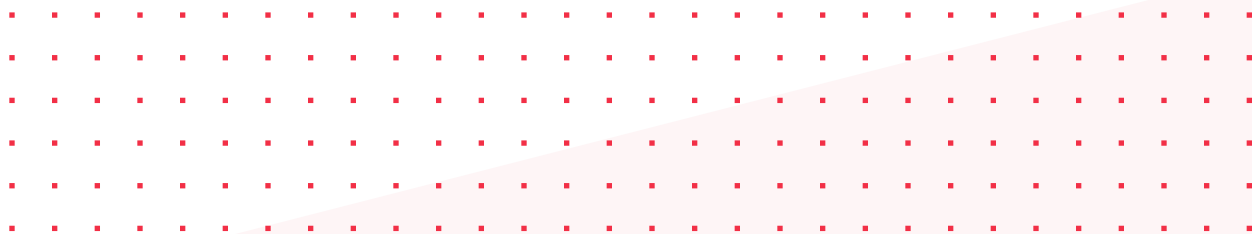
Relevant



Trusted



Timely





5 strategies to build trust and engagement

Here are 5 ways that technology can enable businesses to build trust and engagement during emergencies.

- 1.** Reach more people on their preferred channels
- 2.** Provide proactive, prompt and trusted sources of information
- 3.** Ease the load on your agents through self-service and AI
- 4.** Business Continuity Planning (BCP) for customer engagement touchpoints
- 5.** Bridging the Social Divide

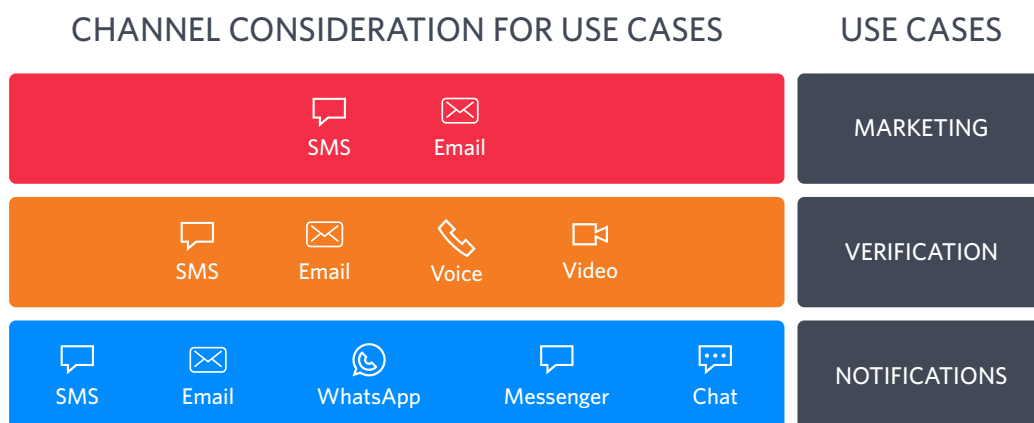


Strategy 1: Reach more people on their preferred channels

The current COVID-19 virus is top of mind for everyone. Much of this concern stems from uncertainty over what information to believe, and speculation about how the crisis will progress. During emergencies, sending messages over the right channels becomes even more critical to your customers and employees.

When selecting your communication channels, **let your end users' preferences guide your decisions**. For instance, when communicating with your business, some users might prefer using SMS while others prefer engaging with you on email, phone calls, video consultations, or automated chatbots. There is also now a rising use of popular messaging platforms, such as WhatsApp, LINE, Wechat and Facebook Messenger and others to choose to engage with your users. WhatsApp, for example, is very popular in many parts of Asia, Europe and Latin America, reaching over 1.5 billion users around the world. Deliveroo has successfully integrated the use of Whatsapp for order notifications and status updates to their customers. LINE, a rich, interactive messaging platform experience is popular in countries like Japan, Taiwan, Thailand and Indonesia. LINE's rich messaging capabilities are a huge draw for businesses, allowing them to devise novel ways to interact with their customers. Rich messages make it easy to send content like images, audio files and videos to name a few, directly to the user in the chat window.

Whenever possible, you should ask your end users what channels they prefer, and ensure you're respecting their preferences during your outreach. If that isn't possible, **determine what your use case is and pick channels that fit the use case**.



Common use case include:

- **Time sensitive emergency notifications:** For this use case, messaging channels like SMS or WhatsApp work well because consumers have easy access to phones and strong usage habits - brands using SMS successfully typically reach 95% of users.
- **Verification:** While it's common to use SMS for two-factor authentication, we've also seen users like ING use Twilio Programmable Video to verify users in scenarios where they can't be verified in person, which is a great way to adapt to our current situation.
- **Marketing:** SMS works well for limited-time discounts and offers. You can also use Email to include rich imagery in your marketing material.



As a general rule of thumb, put yourself in your customer's shoes and think of the customer experience and touchpoints along their journey.

- What's the impact if I don't receive a message for 5 minutes?
- What about if I need to search for a message after it's sent?

Then, think about if your use case is urgent or archival:



In the current environment, we are seeing a surge of urgent messages for things like school closures, flight cancellations, or rescheduling appointments. Longer, informative communications sent on email are useful in communicating with end users, providing links to resources to refer.



URGENT | SMS

"All schools and colleges will be closed during the month of March as a precautionary measure for the safety of our students."

"To ensure the safety of all our passengers, we're issuing 100% refunds on all canceled flights and zero rescheduling fee on all flights booked on AirAcme.com"

"Head to Acme and Bros, your favorite local departmental store has now been restocked with hand sanitizers."



ARCHIVAL | EMAIL

Dear Team,

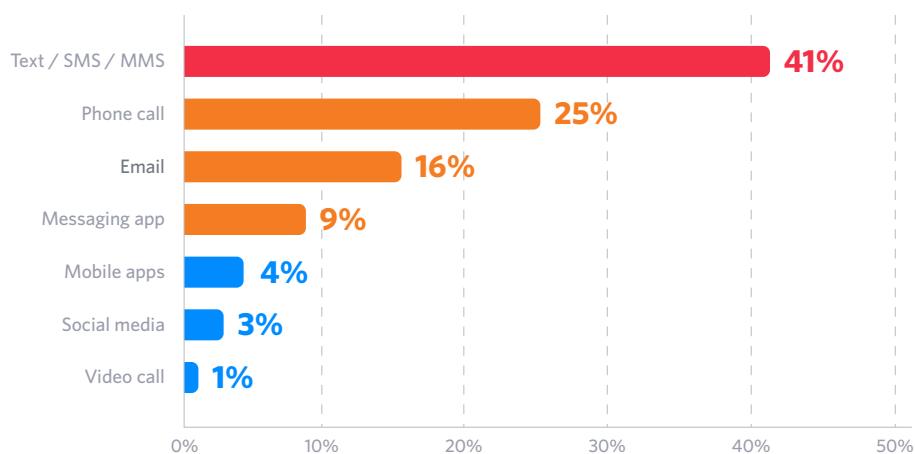
As you know, we have been closely monitoring the rapidly evolving COVID-19 issue and want to update you on our response and a few key decisions that will affect our employees globally.

We are taking some new measures to keep all our employees, their families safe. That's our #1 priority.

- Effective Friday, March 13, at 8:00pm local time, all offices that haven't already been closed will close through March 31 with all offices reopening April.
- Visit the COVID-19 status page we've created to for all COVID-19 updates, FAQs, etc (replacing the wiki page) for more details on how we're managing this process

In a recent Global Consumer Study*, 41% of consumers indicated that they preferred SMS for urgent notifications.

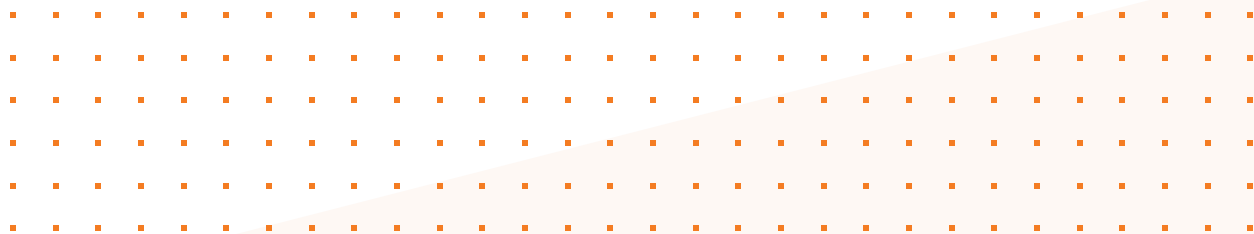
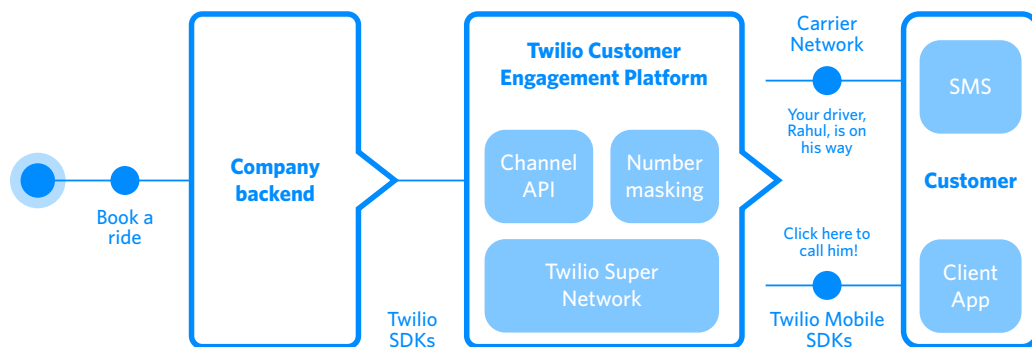
WHAT METHOD IS BEST FOR RECEIVING COMMUNICATIONS THAT ARE URGENT OR REQUIRE AN IMMEDIATE RESPONSE? CHOOSE ONE.





Keep in mind that the other channels could serve as fall back options. For example, if an urgent SMS doesn't get a response, you could send another message by WhatsApp or a voice call.

In implementing an urgent message use case, we work with our customers using the following pattern. Typically, this use case starts with a customer interacting with your system, such as canceling travel arrangements or ordering in food delivery. The system calls on Twilio channel APIs, generally a server side or client side SDK in your preferred programming language, leveraging services like number masking or short codes before relying on the underlying Twilio Super Network to deliver the message. The Twilio Super Network removes the complexity of dealing with geographies and carrier networks.





Strategy 2: Provide Proactive, Prompt and Trusted Sources of Information

The second tenet of customer engagement during times of emergencies is to send relevant messages at the right time. The speed in delivering your messages becomes even more important in delivering prompt key updates to keep your business or organization as an important source of information.

Personalizing your messages with the appropriate tone of voice and **providing opportunities to easily opt-in and out of messages** via text or website will increase brand trust so you can keep your end users up to date on the latest information.

During emergencies, people are looking to hear from you more often than usual. **Being proactive and timely** in your messages about the situation and actions you are taking instill confidence with your audience.

The propagation of fake news is a negative byproduct of social media and misuse of easy-to-use messaging applications. **Making it easy for your users to verify legitimacy** will help users cut through the fog of unfiltered social media speculation and rumours spread by word of mouth.

One way to do this is to send Branded SMS with Alphanumeric Sender ID to reflect the business or organization's name. Setting up a channel for the business or organization on preferred messaging platforms such as WhatsApp, LINE, Facebook Messenger, as mentioned in Strategy 1, can help in ensuring communication coming from a verified source and improve the speed to deliver the message. The Government of Singapore created the official Gov.sg WhatsApp account to provide citizens with timely and trusted updates on the COVID-19 situation. This service is available in 4 languages, and the system has been optimised to send multi-lingual messages to all subscribers within 30 minutes.

Today, 70% of consumers do not answer a call if it shows up as anonymous. Twilio has implemented a number of safeguards into its technology to help ensure that it is only being used to send the communications consumers want to receive.

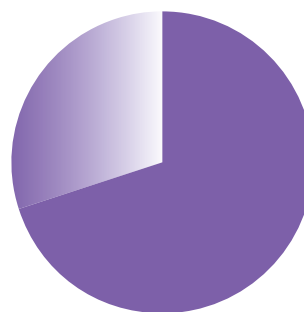


Strategy 3: Ease the load on your agents through self-service and AI

Great customer engagement involves both outbound – sending messages through the right channel, and inbound – where customers want to reach out to your business, search answers to their queries, get answers to their problems, or be updated on a particular topic such as order status, bank balance, and so on. Your business might be experiencing extra load on customer support due to the COVID-19 emergency, especially in industries like healthcare, travel & hospitality, and online retail.

Through a well-planned orchestration across your different customer engagement touchpoints, you might be able to ease the load on your customer support team. One way is by implementing self-service in the form of virtual assistants or chatbots, which can help you improve responsiveness, reach 24/7 availability, and automate workflows in a fast and scalable way.

In the next decade or so, [Gartner predicts](#) that the number of virtual assistants and chatbots will raise ten fold, accompanied by a 70% decrease in the number of calls, chats, and email inquiries incoming to your businesses.



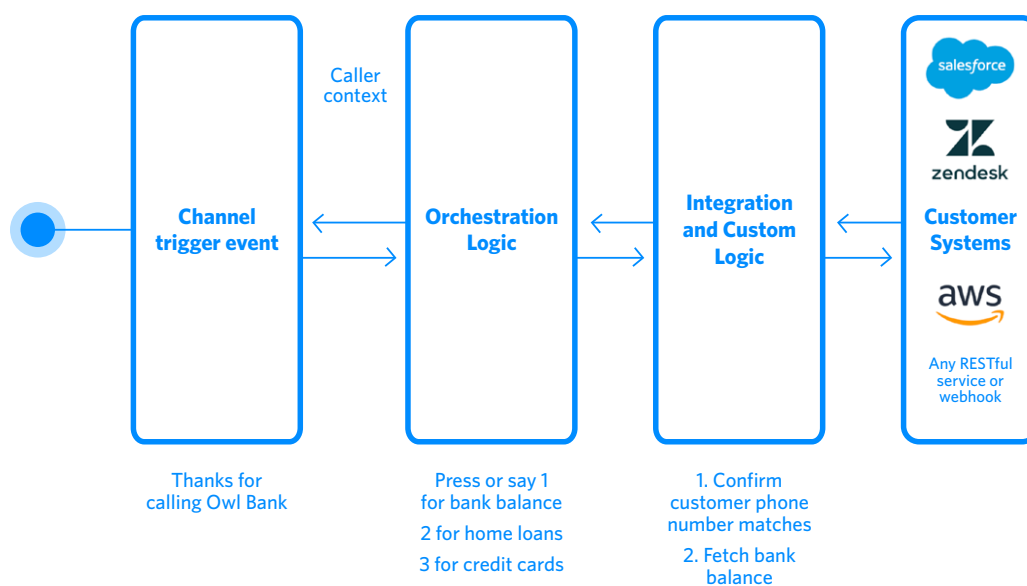
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Interactive Virtual Response (IVR)

For many companies, much of the inbound requests are handled by IVRs. An IVR, or Interactive Virtual Response system, is an automated telephony system that interacts with callers, gathers information regarding the request and requestor, then attempts to resolve the request either via integration with other systems, or by routing a call to the appropriate recipient within an organization.

You can improve your IVR by **fortifying it with customer and business process data** from your CRM. Through smarter call routing and context on your customers' unique situation, you can make a more efficient self-service flow for customers so they get answers more quickly, which is more cost effective for your business.

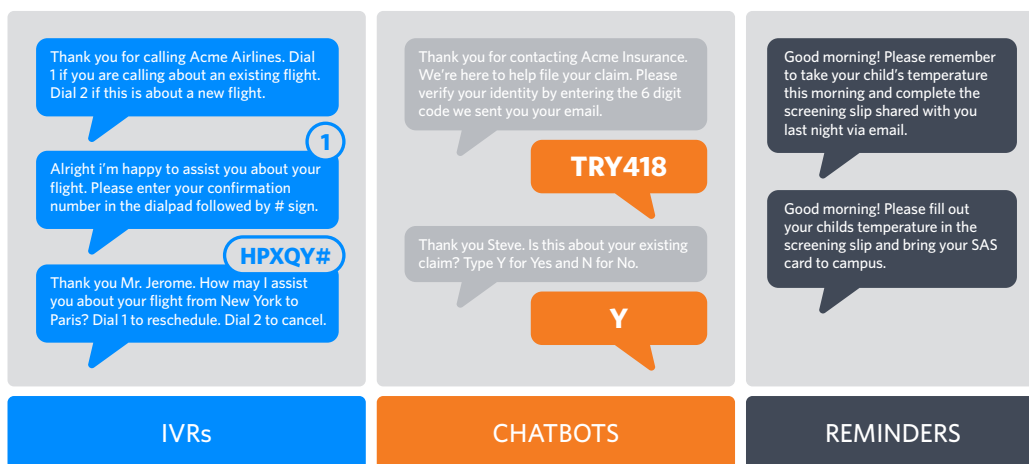


Providing context to you agents through CRM integrations (like Salesforce or Zendesk) will help them engage your customers more efficiently and effectively, reducing your queue. Integrating with messaging platforms such as WhatsApp, Line, Facebook Messenger, and Chat will allow your customers to get in touch with you through their preferred channel.



Chatbots

Serve customers faster and take the load off your customer service agents by **deploying automated chatbots and other self-service capabilities**. Chatbots can greatly impact your business's finances and employee experience by increasing call deflection and agent retention.



Call deflection is a measure of the impact of the amount of times a customer didn't have to call a contact center because their problem was solved in another way, such as self-service. By deflecting incoming calls for non-challenging and repetitive requests, such as rescheduling flights, filing insurance claims, or cancelling hotel reservations, you'll free your agents to tackle more complex, high touch customer engagement activities. A non-challenging work environment was one of the primary reasons cited for agent turnover in a [recent Mercer study](#).

One of the most effective ways we've seen public and health organizations use technology to alleviate operational expenses is by automating appointment reminders and change requests. We have also seen schools start to implement reminders for taking students' temperature before attending class.

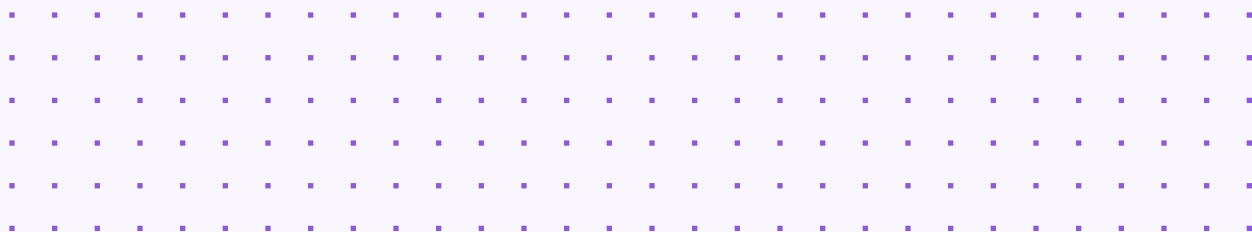


Natural Language Understanding (NLU)

You can extend chatbots to work across every customer interaction—even spoken interactions—leveraging Natural Language Understanding (NLU). Natural Language Understanding, or NLU, is the ability to utilize AI for a computer to interpret unstructured text or voice requests known as utterances, derive intent, and respond. In other words, NLU provides the ability for a computer to handle requests in the multitude of nuances a customer may ask them. For example, “I need to cancel my hotel room,” “Can I rebook my hotel room at a much later time”, and “I need to find out how I can get a refund for my changed booking” are all valid requests that a human would interpret as the same. NLU enables a computer to do the same, and parse the phrase into conversational intent, context, and sentiment.

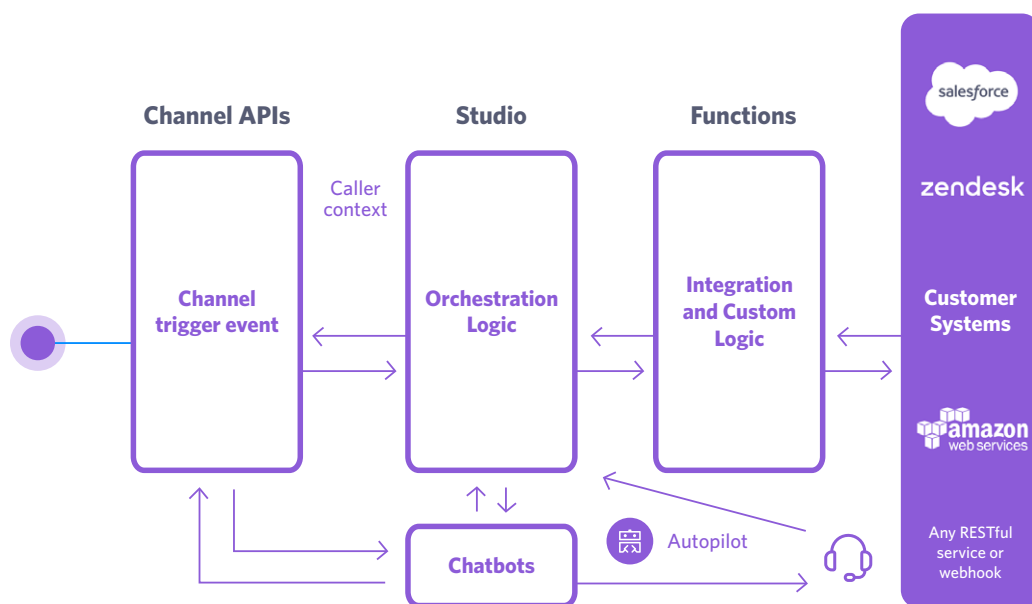
“I need a hotel room in San Francisco from April 4th to the 8th, near the Convention Center.”

```
Need:hotel {intent} - context:San Francisco {city} -  
context:April 4th {check-in} context:April 8th {check-out} -  
need:near the convention center {intent} -  
sentiment:0.5 {neutral}
```





You can build AI into your communications program with Twilio Autopilot, a conversational AI platform for building bots, IVRs, voice assistants, and more. With Autopilot, you can train bots based on real conversation transcripts like call logs, FAQs, and more. Each time the bot has a conversation, it learns and improves.





Strategy 4: Business continuity planning (BCP) for your customer engagement touchpoints

A business continuity plan (BCP) is a blueprint that outlines procedures an organization must follow to maintain business levels at acceptable levels (or recover them quickly) in the case of significant disruption. A BCP is unique to each individual business that creates them, but typically covers business processes, assets, human resources, business partners, and more. The plan ensures that personnel and assets are protected and are able to function quickly in the event of a disaster.

BCP and the Contact Center

In emergencies, having agility is even more critical to ensure business continuity. During emergency response and crisis situations contact centers are often the hub for managing many engagement touchpoints, and demonstrating a company's preparedness to respond with agility is tested, whether from the stress of increased volumes and frustrated customers, or needing to operate while part of your workforce has to work remotely.

In the current COVID-19 crisis, contact centers need to ensure their workplace allows for suitable social distancing measures. They may need to also implement teleworking shifts to allow for remote working, or look at activating another group of agents to help cope with a higher workload.

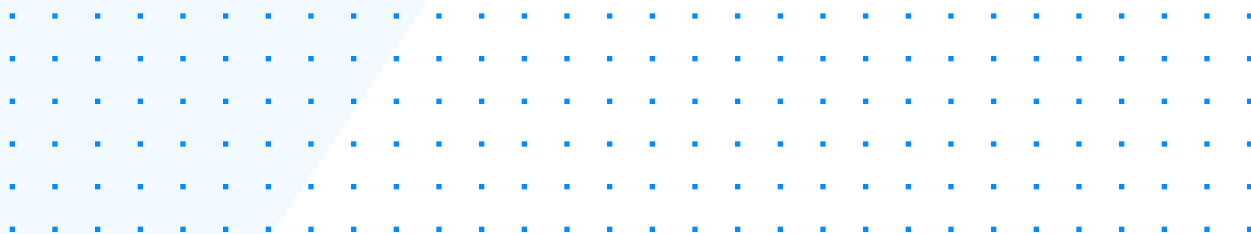
A traditional contact center platform that you buy out-of-the box may not be enough for your agents if it doesn't fit your business's unique needs. If you need to enable remote working, modernizing an on-premise telephony system to a scalable cloud-based contact center that enables remote working would be key. Having one that allows you to design it as a **single UI where all your customers information is available** will empower agents to serve customers from the comfort of their homes. If you need to add backup agents, having a **cloud-based versus an on-premise contact center platform** will allow you to do so at ease.



BCP and Scaling Infrastructure

When you're executing a BCP, it's important to **plan for how your systems will handle additional load** while allowing for agility in the workforce, which could include splitting your workforce into teams, allowing different teams to work remotely or from the office, and adding in more agents to distribute the load.

While many enterprises have deployed IP telephony and SIP trunks, their network and security are geared towards a smaller scale of users and use cases. For example, in the event that an organization needs 50% of their agents to work from home, enterprises might see higher load on their Session Border Controllers (SBC), Firewalls, and other networking gear which may not have been built to handle it. Each SIP device registering to the IP PBX would need to be registered via the Session Border Controller (SBC). This organization's Information Security team would also need to look at ways to secure the network so that no unauthorized device or person has access to the network.





Here are some examples of how we advise our customers to support a scalable approach to their company's BCP:

1. Augment an existing IVR or self-service experience. Create Natural Language Understanding-based chatbots to automate frequently answered questions, and free up agent time to work on more complex customer interactions. This can be done using Twilio Autopilot.

2. Provision your contact center with elastic connectivity using the Session Initiation Protocol (SIP). Twilio Elastic SIP Trunking has elastic capacity managed by the Twilio SuperNetwork that your applications can draw upon as needed. And in times of emergencies, where there may be unprecedented volume of calls that can overload traditional setups quickly, Twilio SIP trunks can scale with additional data network capacity and remote sites can be provisioned in a few clicks. There are also other benefits:
 - a. SIP Trunking is more cost-effective than maintaining two separate networking, instead relying on sufficient broadband internet bandwidth. This means that contact centers can operate virtually from anywhere.

 - b. It is more flexible than legacy connectivity since it relies on data transfer rather than physical equipment.

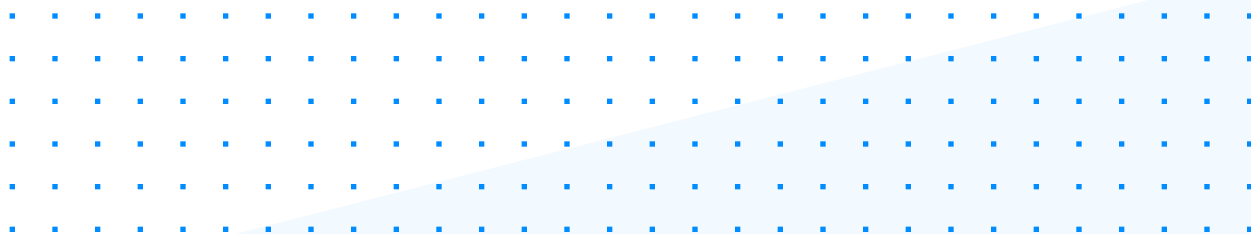
 - c. It allows global coverage since a SIP signal is controlled like data, phone calls can also be routed easily regardless of the location of the receiver.

 - d. It boosts reliability since you can route many simultaneous calls while keeping their digital inward dialing (DID) numbers. DID are virtual numbers that allow you to route calls to your existing telephone lines. This is useful when you have many employees with DIDs, and incoming call routing is critical to your business.



3. Augment the Automatic Call Distribution (ACD) system with a cloud-based platform, such as Twilio Flex.
 - a. Implement WebRTC for the Agent desktop to eliminate the need for a hard phone or soft phone. From an agent's perspective, the agent desktop becomes easier to use and more intuitive. It runs on Chrome browser, so it does not need heavy duty computing.
 - b. By choosing to use PSTN forwarding, it is easy to set up or use SIP integration to connect on-prem infrastructure to the Twilio cloud and start routing traffic based on business rules.
 - c. Track agent productivity, record calls, and monitor remotely with continued access to ACD features.
 - d. Provide the flexibility to also choose to move partial traffic or swing 100% traffic to Twilio temporarily, based on your business needs.
 - e. Implementation requires minimal changes to IT policy and opening of ports.

4. At a time when agility and efficiency is even more key ,consider a platform that allows you to customize your user interface (UI) adequately to suit your business needs. Choose a platform that will integrate well with CRM platforms like Salesforce and Zendesk to provide better context to your agents who can engage your customers more effectively. Integration with other messaging platforms such as WhatsApp, Line, Facebook Messenger, and Chat will also help in reducing the queue, and allows for customers to choose their preferred channel to get in touch with you. This allows better ability for your agents to get to your customers much faster and efficiently.



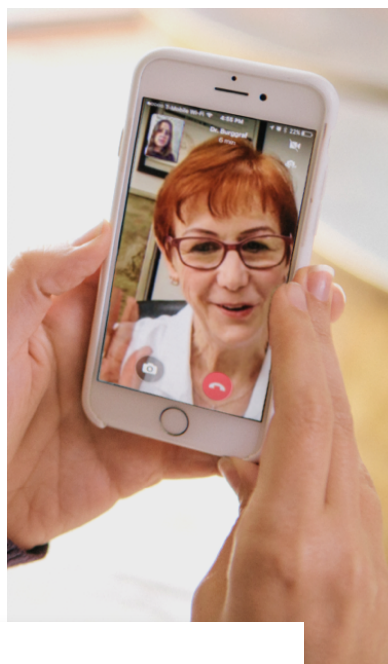


Strategy 5: Bridging the social distancing divide

Social distancing to minimize virus spread drastically changes the way we go about our daily lives. Businesses face a new challenge in finding new ways to keep customer engagement personal, remotely. Technology has a big role to play in this new era of remote working.

Many are now needing to work remotely from home, phone and video conferencing has now taken on new importance on how we communicate with our colleagues. While many software-as-a-service solutions exist, we have seen businesses or organizations choosing to build their own customer conference call solution to add it to an existing application to custom to their specific needs.

Online retail and deliveries have seen dramatic increases as people opt for food, groceries and other items to be delivered to them. To safeguard staff and for the comfort of customers, contactless deliveries had risen, whereby deliveries are left at the doorsteps and the customer is notified to pick up. Riders are able to see when this option is selected by the customer and is able to follow instructions left by the customer. Timely notifications through messaging and voice to inform the customer of when their deliveries arrive are key. In the situation when both riders and customers need to communicate, number



In telemedicine, video is vital to providing high-quality care to patients. Doctors depend on a smooth connection and clear image to provide proper diagnosis and accurate treatment. Twilio customer Doctor on Demand connects patients with a board-certified physician or mental health professional any time of day, from wherever they have an internet connection, through their mobile app and website using Twilio Programmable Video. GPNOW is an Australia-based telehealth company that provides contact-free video consultations called "CoronaVirusCare". They use high-definition/low-bandwidth video technology to connect concerned Australians with a qualified medical professional to provide immediate assistance.



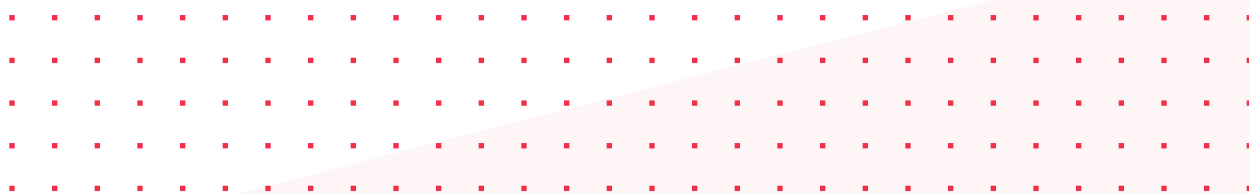
masking can be employed to allow them to do so by using their mobile phones without divulging their personal phone numbers.

For example, if you wake up feeling sick, the last thing you want to do is roll out of bed, drive to your doctor's office, and then sit in the waiting room for 30 minutes, only to pick up a prescription to fill at the pharmacy. What if you could schedule a doctor's appointment instantly, and meet with them directly from your home?

Using video adds an additional human element of communication that is hard to find in chat- or voice-based channels. This human element is especially critical in healthcare where doctors rely on visual cues from patients to diagnose their symptoms.

An example of adopting technology to enhance the engagement experience is a video banking service offered by Standard Chartered Bank. With their video banking, clients can speak with agents over a secure video connection from a location of their choice – all they need is a laptop. This sales and service channel allows clients to do almost anything they can do in a branch, from signing up for a new card to finding a mortgage to suit their needs. In addition to video, Standard Chartered's retail banking clients - and prospective clients - will also be able to connect with agents through web chat and audio links on the Bank's website.

Another example of reimagining the engagement experience is Mox, a virtual bank by Standard Chartered Bank, in partnership with HKT, PCCW and Trip.com. Based in Hong Kong, it offers online retail banking services. Designed to complement a virtual lifestyle, this mobile-only bank removes the need to queue in a branch and is open 24/7.



conclusion

Customer engagement is key to the success of your business, but becomes more challenging to address during the COVID-19 pandemic. Ensuring your business is set up to send proactive, timely messages through relevant channels with the right frequency is important to instill confidence and to minimize unnecessary rumours.

As you adapt your business to address emergency or disaster recovery needs, think through how you can strengthen your different customer engagement touchpoints. Consider self-service means as an easy way for your customers to reach out to obtain information quickly, and allow for the more complex questions to be addressed by your agents. You should also ensure that your contact center, a critical hub for a variety of customer touchpoints, is designed to be agile and scalable enough to handle whatever you throw at it.

Keeping the engagement with your customers personal, but remote requires reimagining new ways of conducting business. Fortunately, technology can be a key enabler to create new virtual ways of bridging distances.



Your all-in-one customer engagement toolbox.

Thanks for reading!

Learn more about how
Twilio can help

[Talk to us](#)



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