

MOBILE AND THE CONTACT CENTER: *THE GAME IS CHANGING*

Customers are abandoning landlines and their limitations. **It's time to get moving on a cohesive, enterprisewide mobile strategy.**

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WE RECENTLY GOT rid of our landline, and I bet many of you have already done the same, or will soon. We live by the smartphone. It's our "go-to" directory, information, web and application source. We use it to self-serve or seek assisted service with companies big and small. Whether we make contact frequently or infrequently, we want to get our business done on this device.

I'm a "Baby Boomer," not one of the "iGeneration" or "Millennials" or "GenX." There is a shift in customer interaction expectations that applies to *all* of the generations you serve. There is ample, compelling data on the demise of landlines and the growth of and use of smartphones. (And watch out, both are accelerating!) This article is going to focus on how you handle it, not make the case that you should.

I'll define what "mobile" entails, what you can do with it, and how vendors are responding in varied ways. I'll encourage you to pursue a cohesive mobile strategy and plan across your enterprise.

Comprehensive "Mobile" Technology

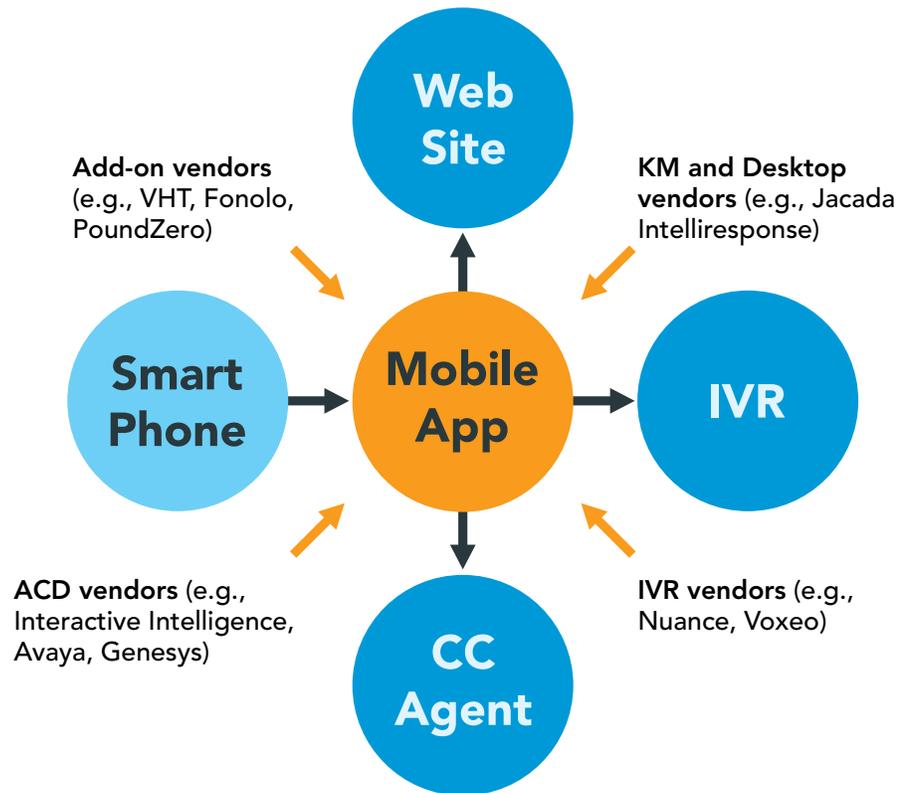
My study of emerging mobile solutions for the contact center, combined with my 25-year history in this industry, makes me smile. Everything we've thought about in contact center technology over the years comes together, enhanced by the capabilities of the mobile interface. Solutions that integrate between mobile self-service and assisted service across channels are the starting point, adding the mobile phone's inherent multimodal abilities for talking, texting and selecting from "prompts" to make choices.

Self-service capabilities for smartphones can tap web or IVR capabilities, as well as unique mobile applications. Now, the interface may be speech-enabled and comfort and familiarity with "Siri" or other friendly smartphone assistants may promote its use.

As we cross into the realm of assisted service, a caller from a mobile phone could skip frustrating menus by virtue of the information a smartphone application can gather and use. Whether transitioning to an inbound call that uses the information entered on the phone or selecting the option to receive an outbound call (complete with expected wait time and updates), it is familiar, yet *better*. Things like "screen pops" and "virtual hold" come with a new flair.

For those of you who like chat or text messaging, you'll appreciate using mobile chat or exchanging text messages with a company through the mobile application. You may even go "multimodal," requesting a follow-up message or email. And when we talk mobile, we can also think about integrating with social networks (e.g., Facebook, Twitter) and leveraging things like photos, video and location services.

For example, let's say I am checking flight status on my smartphone. I see my flight is delayed and I'm going to miss my connection. I can try self service through the mobile web interface or through an application I've downloaded. But I can also connect with the airline's center from my phone. If I've got location services on, they might use that information in considering my options. (Close enough for a flight about to leave? Other airports in the area?) If I've logged into an app, they've got my frequent flyer information and all my account details. If not, they can ask me for that information before connecting (using the keypad or speech), or confirm based on my phone number and security password. My place within the app or mobile web interface tells them what I was doing. The airline has all the information it needs to route my call, pop screens and provide "pain-free" service. It's *much better* than calling in and going through those darn menus. Alternatively, they can present a message on my phone that provides the expected wait time and ask me if I'd like to wait or be called back.



Many Angles for Mobile and the Contact Center, Figure 1, above

TECHNOLOGY TOOLS FOR MOBILE SOLUTIONS

Mobile solutions for the contact center use a variety of familiar technologies. They leverage common development environments and provide Software Development Kits (SDKs) to develop applications and integrations. They can work with an existing mobile application or be the source for a new app. They can leverage Application Programming Interfaces (APIs) to create an easier, common way to integrate and communicate. The integration tools leverage Web Services and “connectors” to IVRs and phone systems, in the fashion of Computer Telephony Integration (CTI) that we’ve known for so long.

As you add mobile to your service offerings, you should consider how it will integrate with Knowledge Management (KM) and Customer Relationship Management (CRM) tools. My mobile self-serve efforts can tap the same knowledge base that web users and CSRs use, and my activities could feed forums in the social world. CRM could capture my mobile interactions and outcomes so that, as I cross channels, I receive consistent information and experiences and have continuity from one media to the next.

Companies using mobile and all the related technology effectively use information about me and my interactions to hone the customer experience. For example, they could set me up for proactive contact, pushing information to my phone that might preempt another contact. And, of course, all the interaction information will feed into reports and analytics to evaluate and optimize my interactions and their offerings.

Who Is Changing the Game

While I started (and will end) this article with a call to action based on the compelling case for mobile and its imminent impact, I'll admit that it's early in the game. We're at the "innovators" and "early adopters" stages of the technology adoption lifecycle. Nascent technology poses some risks (will this product/vendor/approach make it?!), but this lifecycle is going to move fast. The spectrum of vendors approaching mobile is very broad and varied. As Figure 1 shows, vendors are coming at it from many angles, offering varying degrees of functionality. The best way to proceed is to exercise some caution in interpreting what a vendor offers. With mobile solutions tied to so many other technologies, there is risk of confusion or over-simplification. For example, is a "virtual agent" a speech interface to a mobile app, or a helper that gets answers? It depends on who you talk to. Since there are so many vendors and approaches, make sure you are clear about what they do, where they fit, and how their offering works.

Here are some notable perspectives:

- Contact center technology vendors (e.g., Interactive Intelligence, Avaya, Genesys) can leverage existing mobile apps or help build new ones. They include the functionality similar to the offerings they've had for voice contact routing and handling (including IVR and CTI) but with the mobile phone advantages: "visual IVR," call through to an agent, visual queue (expected wait time), and agent call-back.
- Nuance offers a speech interface and biometrics for authentication. Both of these capabilities have been available for years with IVR, with limited penetration and success. Mobile may change that.
- IntelliResponse optimizes costs using self service while meeting customer demands for easy access to information and answers. Now customers can use the mobile phone to tap the same knowledge base developed by CSRs or customers interacting through the web.
- Fonolo and PoundZero are examples of newcomers who address the "typical" problems of transition from self to assisted service. They provide the links between the mobile interface and the agent in the contact center with minimal changes to existing technology.
- Many vendors push "visual IVR" to leverage existing applications via a mobile solution. The ability to sidestep the long "to do" list in IT can help companies move faster.

The “cloud” is at the center of technology sourcing changes in our industry. Many mobile apps and integrations will use cloud-based capabilities. For example, a cloud solution integrated with your center may “hold” the caller’s place in queue. That cloud solution monitors the center, and calls the customer to conference in an available agent when ready. In line with the need to lower reliance and demands on IT, these options can get mobile going sooner, with more functionality.

Strategy and Planning Considerations

With all these options, along with the reality of diverse channel ownership in most companies, strategy and planning are more important than ever. As contact center and IT leaders, you must bring the right people together to define requirements and deliver a solution that truly optimizes the customer experience. You and your colleagues must sit squarely in the customer’s seat to optimize first-contact resolution, handle time, and cross-channel customer experience.

Remember, the customer perspective is: “If I need information or help, I’ll start there, but I want the option to seamlessly cross media using my multimedia device.” You can’t just let those responsible for the “mobile app”—such as an IT team, web group or a mobile app team—run with it. You have to tackle issues on silos of ownership and bring together IT (including web and/or mobile-focused teams), contact center, marketing, and whoever owns social media and the IVR. Self service on the mobile phone needs to align with other self-service applications while accommodating the unique characteristics of each interface. Start by making sure to separate the mobile website and/or app from the main corporate website. A mobile app providing “visual IVR” should be simpler than the voice equivalent. And, of course, you’ve got to look at use cases and address the transition to and integration with the contact center when a customer needs help. Our industry has a chance to get it right and avoid the pain invoked for years as customers move from IVR to agent, or web to chat session or phone call.

Start by defining your strategy and requirements for the mobile application and its integration with the center. Then assess what you have (because mobile builds on so many elements of existing contact center technology), identify gaps, and create a plan to close the gaps. Part of that effort will include looking at the vendors with whom you have relationships and their mobile offerings. Look broadly across your ACD, IVR, KM, desktop and CTI vendors, and understand how your mobile solution will integrate with your other platforms. This step may lead to technology selection—with existing vendor partners and/or new ones.

As you pursue your requirements and planning, here are some key considerations:

- Do you already have a mobile app, or will this project trigger it? If the former, will you add to or alter it? If not, will you build a mobile app or buy a tool to build or integrate it? You’ll also have to consider the mobile app approach: native or web-based. If the project will trigger building the app and/or interface, consider vendor tools that include easy development interfaces—e.g., a “what you see is what you get” (WYSIWYG) approach that can be done by non-programmers.
- How will you integrate the mobile app with the contact center, and what data will you tap? Will you leverage your IVR or web interface, or will it be direct mobile app integration? Tackle security issues and your ability to gather specific identifiers to integrate with account or customer-specific data, as well. Explore architecture and integration with vendors to see the differences and determine the approach that meets your needs across functionality, technical design, speed, resource demands and more.

- Consider the broad set of devices your customers may use: iPhone, Android, Windows, even Blackberry. Consider use cases and issues unique to the multimodal customer interaction. For example, can users do multiple things on the phone at once (e.g., work in app while talking to customer service)?
- Planning also must consider the media in play. Beyond phone calls to and from the mobile phone, will you consider mobile chat or text messaging? How about ties into your social media strategy for Facebook and Twitter integration?
- Don't forget the performance optimization elements of this additional media. Reporting and analysis, quality, voice of the customer and all the other performance elements apply. Chances are you can leverage your existing technology and processes.

Get on the Move

Your customers are no longer tied to their landlines or the limitations of a clunky old telephone. While this area is new and one of several hot topics vying for limited attention, resources and budget dollars, it is compelling and imminent. It's time to get departments together across the enterprise, plunk down in the customer's seat, and play out the mobile scenarios that make sense for your business. Then turn that role play into a plan, working with vendors—old and new. And if possible, ask *your customers* for input. They'll tell you it's time to get moving. 

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THE GAME, IN A NUTSHELL

The top things people are doing with mobile today—or soon—and the impact they can have:

- Boost self service with mobile applications (if they aren't in place already).
- Transition from mobile application self service to assisted service with an agent to offer a seamless, cross-media experience from one device.
- Support visual IVR to simplify customer identification and assess needs.
- Offer Expected Wait Time (EWT) and call-back options to reach an agent without wasting time in queue.
- Pass information from the mobile phone to the agent to provide context, shorten calls and improve the customer experience.
- Develop a new mobile application or extend an existing mobile app into the contact center through integration.

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