

Tech Line



Text-Based Technology

Combine strategy, technology and operational integration for text chat success.

By Lori Bocklund, Strategic Contact

In 1992, Bruce Springsteen sang about “57 Channels (And Nothin’ On).” Now cable TV has grown to hundreds of channels, but, arguably, there’s still nothing on. Fortunately, the same can’t be said about contact centers. Had anyone been inclined to sing about them in 1992, there would have been the one lonely access channel: the phone. Since then, fax and email have landed on most centers’ play lists, and text is now the “hot” new channel. Visitors to a growing number of Web sites can initiate text chats with agents. Internal messaging (IM) is gaining ground as a means to link agents with internal subject-matter experts. And short message service (SMS) holds the promise of proactively reaching the next generation of consumers. If text-based communications isn’t on your play list, it ought to be. But you’ll need the right combination of strategy, technology and operational integration to create a smash hit.

Start with Strategy

Before you set up your first vendor meeting, you need a strategy for text-based communication — for your agents and your customers — so that you can plan for the right technology and deploy it in the right way.

First, define the business drivers. Are you seeking to cut costs, offer customer choices, drive more sales, improve Web site use, enhance career paths in the center, reduce transfers or increase first-call resolution? You need to understand what problems you’re solving or benefits you’re seeking in order to pursue the right technology. You should also consider how the technology might affect your operation. For example, you may think text will offset voice calls, but your improved Web-based service might attract new and different customers that you must be ready to serve. If you’re focused on revenue, that’s good news. If you’re focused on cost, you may be disappointed. Likewise, if you want to use IM to “unify communications” across your enterprise and tap subject-matter experts, recognize that it is relatively easy from a technology

Text Chat Technology Capabilities

Ready to seek text chat technology for your center? Here are some important capabilities to consider for your requirements list:

- Multiple concurrent sessions
- Co-browsing and page push
- Assisted form filling
- Automated response templates
- Dynamic and/or proactive chat availability
- Conditional chat routing
- Links to email, KM, ACD, CRM, etc.
- Security and encryption
- Reporting (real-time and historical) and analytics
- Surveys
- Chat transcripts
- Click-to-call/VoIP integration

perspective, but has significant process and organizational implications.

Second, be sure the operational strategy is clear. The technology looks different for dedicated teams than for blended agents, and it may look different if it’s a call center-only capability versus an enterprisewide deployment. Finally, you need to decide if you are going to dip a toe or dive in. As you’ll see, there are a variety of ways to source these capabilities, and dipping or diving can lead to very different cost structures and expense allocations.

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Text Chat Supports Assisted Service for Web Customers

External-facing customer text chat from the Web site is the first target to consider. It boosts the success rate of Web-based self-service by helping customers solve problems or complete purchases without leaving the Web site. It also encourages repeat users. Centers can apply their voice call-routing and handling expertise to text chat while considering the unique characteristics of chat.

Routing and Handling Another Media

Text chat is a form of real-time communication with an agent. You must queue the contact to the appropriate group or skill, provide treatment for the contact while in queue (and decide if you will provide such things as a quality message, expected wait time or even an advertisement), and deliver the chat to the best available, properly skilled agent. You also need to track and report on contacts in real-time and capture data for historical reports. Like a voice call, the ideal text chat has desktop integration to “pop” the appropriate contact information upon arrival. Occasionally, the agent may need to transfer, follow up or escalate the chat, or even request that it turn into a phone call. Upon completion of a chat, the agent will wrap the contact by capturing key information, including disposition. Sounds pretty much like a phone contact, so how can the contact-routing and handling technology be much different?

First, you can’t simply publish a number and provide an after-hours recording when agents are unavailable. Your Web developers need to build rules to determine when to display the chat icon and to whom to provide the option (e.g., high-value customers). Likewise, if you initiate text chat proactively, you won’t be using a predefined list of contacts. Rather, you’ll need technology to “observe” visitor Web activity and trigger connections based on behaviors and rules when and if agents are available to assist.

Table 1: Text-based communications technologies and their fit for the contact center

| Technology | Contact Center Application | Contact Center Benefits |
|-----------------------------|---|--|
| Text Chat | Web-based interactions between customers and agents | <ul style="list-style-type: none"> Resolves customer problems and/or completes purchases Encourages self-service, repeat visits Expands customer base |
| Internal Messaging (IM) | Internal messaging between agents, teammates, supervisors and/or subject-matter experts | <ul style="list-style-type: none"> Streamlines interactions Reduces transfers Increases first-call resolution |
| Short Message Service (SMS) | Proactive notification from the center to its customers | <ul style="list-style-type: none"> Provides customers with choice of notification medium Pre-empts agent interactions “Wows” customer with service excellence |

For maximum efficiency, agents should be able to tap prebuilt responses that they can piece together and edit easily. You’ll want to track usage of these elements and have a process for adding to your library. You’ll need to decide how many sessions each agent can handle, and how you’ll present and differentiate those sessions at the desktop. Best practices may say two to three sessions work, but you’ll need to consider the nature of the contacts and configure the user interface to help agents provide the right answers to the right people.

Finally, chat has unique performance-tracking demands that intensify when agents handle multiple media or concurrent sessions. For example, response times must address the initial greeting *as well as* subsequent responses to customer queries/comments. Handling times could be the elapsed time for a given contact, or the agent’s actual interaction time with that contact.

Integration Considerations

Text chat can integrate seamlessly into the contact center’s routing architecture using information about the customer and the customer’s needs. The “who” is gained from a login, a form, or a simple request for the customer’s name. The “what” is gained via the URL. These mechanisms are the technology equivalents of ANI, DNIS and

prompt response or menu selection on a voice call. When chat is part of a multimedia queue with voice calls, email or other contacts, the “skills” can include media as one dimension. The business routing rules sit in one system and use an integrated tool to build and manage all routing paths. Such rules allow real-time media to take precedence over non-real-time media.

Chat can integrate with customer relationship management (CRM) to show past contacts (of all media or channels, ideally) and knowledge management (KM) to provide answers to questions, even feeding the prebuilt responses. Chat can use computer telephony integration (CTI) to “pop” the chat when it arrives and support other levels of integration for collaboration, such as page pushing and co-browsing. These capabilities allow the agent to help the customer complete forms or direct them to the right Web location to ensure sales closure and enhance future self-service.

Text Chat Ties into Performance Technology

Contact centers are rich with technology to monitor, measure and drive performance. As text chat migrates from a novelty to a major service channel, centers need to tap a full suite of performance tools to match. These tools include:

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Twitter, Yammer and Web 2.0 Let Companies Broadcast Text

Perhaps you have “tweeted” on Twitter, or “yammered” on Yammer. These tools, known as microblogs, are another form of text-based communications. They broadcast a short message to a set of subscribers, and can include links, video, photos or other information. Some, like Twitter, have a 140-character limit, as these messages may go to mobile phones or be tapped via the Web. Twitter is a

public tool that companies are using for marketing, sales and service interactions with customers, or to share information with staff. Yammer is an internal tool, used to communicate broadcast messages to a team. These text-based tools may transform customer interactions!

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- Scorecards and analytics to present performance on chat handling tied into quality monitoring (QM), voice of the customer (VoC), sales and other outcomes
- QM to assess the customer experience, compliance and other factors that define a quality interaction
- Workforce management (WFM) to schedule dedicated or blended agent time to handle chat, matched to workload demands
- Customer survey/VoC to get the customers' perspective on the interactions, outcomes and value
- Other tools, such as "speech analytics" extending to text analytics

Sourcing Approach

As centers think about the many functional capabilities and characteristics of text chat technology, they must also consider the best way to source the technology for their operation. Text chat can be premise-based or hosted, or can be provided through an outsourcer — on their technology or yours. Text chat can also be standalone or integrated as part of a multimedia routing and reporting engine supporting blended queues. Whether companies blend their agents or not, having a multimedia engine offers advantages in developing and managing routing and skills across media, and reporting on the outcomes.

Cost Considerations

One of the great inhibitors to any technology is cost. Text chat technology cost can be marginal, depending on your starting point and your sourcing approach. The first consideration is licensing, which may be bundled into existing licenses or a small add-on (e.g., multimedia agent license which includes voice, email, chat). With hosted solutions, you typically pay licensing fees only, based on the number of active or named users. Text chat implementation may incur professional services fees to establish the appropriate skills and routing rules, and the integration into the various elements discussed above.

Those who are taking a toe-dipping approach to this technology should consider pilots and work with vendors to find low-cost ways to try text chat, whether premise-based or hosted, or use an outsourcer who already has the technol-

Table 2: Chat can have implications for many contact center technologies

| Technology | Implications |
|----------------------------------|---|
| ACD | <ul style="list-style-type: none"> ▶ Decisions about integration for skills and multimedia routing and reporting |
| Reporting, Scorecards, Analytics | <ul style="list-style-type: none"> ▶ Address unique metrics and calculations, especially for blending and multiple chat sessions ▶ Gather data on chat activity for reporting, presentation and analysis |
| QM/Contact Recording/VoC | <ul style="list-style-type: none"> ▶ Capture and retain Web-based interactions for review ▶ Analyze interactions for agent quality, addressing characteristics unique to chat (e.g., spelling, grammar) ▶ Obtain customer feedback on contact experience |
| WFM | <ul style="list-style-type: none"> ▶ Web chat demand forecasting ▶ Scheduling algorithms that consider multiple chats or multimedia contact handling |
| CTI | <ul style="list-style-type: none"> ▶ Supports page push and co-browsing ▶ Option for Web visitor to request a Web-based voice call or callback |
| CRM | <ul style="list-style-type: none"> ▶ Capture chat as part of contact history |
| KM | <ul style="list-style-type: none"> ▶ Agents guide customers to the correct knowledge on the Web ▶ Agent access to KM for rapid resolution |

ogy. Vendors may help you try a small number of agents for little or no licensing costs.

IM Supports Agents in Their Endeavor to Serve Customers

While customer-facing text chat is ramping up to reach its tipping point, internal-facing chat through instant messaging is already becoming a powerful tool inside centers and across enterprises. It can streamline interactions, reduce transfers and increase FCR rates. This technology requires carefully defined rules of engagement to ensure value without distraction. The rules define how and when an agent can tap others, who they can tap and whether the targets are an information resource only or a transfer destination as well.

When people talk about IM, they often talk about unified communications, or "UC." IM works along with "presence" to show the availability of staff, much like a call center workstate. IM integrates with calendars to show if someone is busy or in a meeting. Centers using these tools need to consider that "presence" is a different form of workstate, but not generally as rich as or integrated with the call center workstate used for voice calls or chat. The result is that the two states can disagree (for example, "available" in presence, but "on a contact" in the ACD workstate) and convey different levels of information ("unavailable" in presence, but "unavailable because I'm on break" in the ACD workstate).

A phased implementation begins with agents using IM to tap supervisors or teammates for clarification or support. It lets the center work

out its rules of engagement while the function stays within its own ecosystem. This phase may include a second tier of subject-matter experts who are normally reached via phone (or good old-fashioned walking over to their desk), but who can now be tapped more quickly and efficiently via IM. Centers need to consider whether their company has an enterprisewide IM tool to use, or whether they need to look to their technology provider for IM tools.

A follow-up phase taps resources across the enterprise, including product owners, marketing, field resources or others. As long as the company has an enterprisewide IM tool, such as Lotus Sametime or Microsoft Communicator, the technology is relatively easy to implement. The center may define groups so they can quickly find someone with the right skills and an available presence state. If the enterprise has multiple IM tools, or the agents need to chat with others outside of their messaging system, systems can be "federated" to link across environments.

SMS Supports Customer-Defined Proactive Messaging

Center-initiated contacts are commonplace today. Banks provide notification of low balances. Airlines let passengers know when flights are delayed. But in the brave new world of Twitter, unlimited text messaging and personal digital assistants, an email or phone call may not be the preferred channel for receiving these notices.

The industry has defined communications-

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enabled business processes (CEBP) as a new term, often tagging it as part of UC. However, the concept has been alive and well in notification services for years via IVRs, hosted services and outsourcer offerings. Now we must consider the growing choice of channels and let customers choose how to receive their notifications, and under what circumstances. The technologies to enable CEBP and SMS messages include:

- A tool to capture customer preferences and integrate customer-entered information with agent-captured information. These preferences define the business rules for what I want to know, when, and how (what channel, under what circumstances)

- The ability to respond when appropriate by forwarding the message, replying, requesting more information or responding and connecting to a live interaction via text or voice for more in-depth information

The contact center plays a support role in enabling SMS, helping market the service, setting it up for customers and responding to their deeper needs. Thus, the center needs to be integrated with the messaging service in ways similar to those defined above for text chat. The good news is the contact center benefits from these messaging services, avoiding inquiry contacts and having happier customers who proactively receive the information they need.

Technology Is an Enabler

Technology won't drive what people do with text-based messaging, but it will enable what makes sense for the business goals, tied in with process and organizational changes. Centers that embrace the technology as a powerful tool, tied into their other contact center interaction capabilities, will reap the rewards this channel has to offer and find out there is something interesting going on. 

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Table 3: Considerations for primary text chat sourcing options

| Sourcing Option | Pros | Cons |
|--|---|--|
| Standalone | <ul style="list-style-type: none"> • Best-of-breed functionality | <ul style="list-style-type: none"> • Requires additional HW, licenses, maintenance, pro services, etc. • Complex to integrate with existing contact center systems |
| Integrated part of Contact Center Platform | <ul style="list-style-type: none"> • Tight integration with other interaction channels • Lower per-license cost when sold as a bundled solution • Robust features and functionality | <ul style="list-style-type: none"> • May be a “bolted-on” chat solution from an acquisition • Vendors may offer multiple Web chat solutions |
| CRM Solution | <ul style="list-style-type: none"> • Tight integration with contact tracking and history • Robust features and functionality | <ul style="list-style-type: none"> • May be a “bolted-on” chat solution from an acquisition • Complex to integrate with existing contact center systems |
| Service Provider (Hosted or SAAS) | <ul style="list-style-type: none"> • They manage the HW, SW, system design, reliability, etc. • Relatively easy and low cost to pilot • Pay as you go | <ul style="list-style-type: none"> • May require integration services and training • Need to develop and monitor service level agreements |
| Outsourced Service Provider | <ul style="list-style-type: none"> • Often uses a best-of-breed solution, providing extensive reports and analytics • Allows you to focus on higher volume interaction channels, such as voice and email • Reduces impact on WF scheduling | <ul style="list-style-type: none"> • Little or no direct control over the agent's skills or the available features • May require additional work to ensure cultural alignment regarding grammar, communication style, etc. • Need to develop and monitor service level agreements |

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