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ASSISTED SERVICE IS ALIVE AND WELL...

BY Lori Bocklund **and** Brian Hinton, Strategic Contact Inc.

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WHEN CUSTOMERS NEED THE HUMAN TOUCH, TECHNOLOGY ENABLERS CAN HELP TO ENSURE SUCCESSFUL INTERACTIONS.

BY Lori Bocklund and Brian Hinton, Strategic Contact Inc.

REPORTS OF THE DECLINE OF THE NEED FOR HUMAN INTERACTION IN THE CONTACT CENTER ARE A BIT PREMATURE. While it might be a noble goal to obsolete phone calls, email, chat and text, the need for dialog is still pretty strong.

In last month's Tech Line article ("Achieving Self-Service Potential"), we noted that one of the reasons customers pursue assisted service is that self-service options **fail** them. Other reasons they reach out for human contact are that they **don't like** self-service or their requirements for information or transactions **don't fit** self-service. In this article, we'll use these realities to review the latest in assisted-service capabilities and discuss how to optimize your customers' experience throughout the interaction cycle.

I Just Want to Talk to Someone

Whatever the reason for wanting or needing assisted service, customers trying to reach a human being all have one thing in common: They want to resolve their issues with as little effort as possible. No matter which path got them there, data on the customer and contact needs to be used every step of the way to ensure a personalized interaction focused on quick, easy and complete resolution.

If customers **fail** at self-service, the self-service channels they were attempting could determine their assisted-service channel. For example, an IVR contact leads to a phone call, web leads to email or chat, mobile leads to text or call. But they could also cross channels, an increasingly important factor in today's "omnichannel" world. If they were already identified and verified, their data should travel with them or be accessible in a database at the next landing point. You also need to know where they have been and what they have attempted so they don't have to repeat that information. It lets agents begin the contact by offering assistance with the process their customers were attempting when they reached out. This use of information already provided is the first step in minimizing level of effort and optimizing the customer experience for assisted service. As a bonus, it reduces handle time!

When customers just plain **don't like** self-service, chances are they won't use it, even if you try to push them (so don't)! Based on past behaviors (e.g., pressed 0 repeatedly in an IVR) or indications (e.g., they commented or your agents ask if they prefer to bypass the IVR), you could capture in the account records that they don't like self-service so when they are identified, they route directly to assisted service. You may be able to use identifiers such as Automatic Number Identification (ANI), but informing customers of this service may also give them incentive to enter their account numbers and passwords to Identify and Verify (ID&V) for immediate routing to agents. The savings in ID&V time is positive for all, and you have again lowered level of effort.

If the reason for contact is **too complex, urgent or sensitive**, or is not offered in self-service, customers are destined for assisted service, and the goal should be to get them to someone as quickly and easily as possible. As noted above, if they tried self-service, any information they provided should be used to route to a skill set capable of assisting them with the process from which they exited. If not, use account data to determine if there is a transaction in process or obvious issue based on their account status.

Once reaching an agent, contact handling and any associated follow up and escalation activities should continue to use data and apply it specifically to each customer's situation.

Technology Enablers

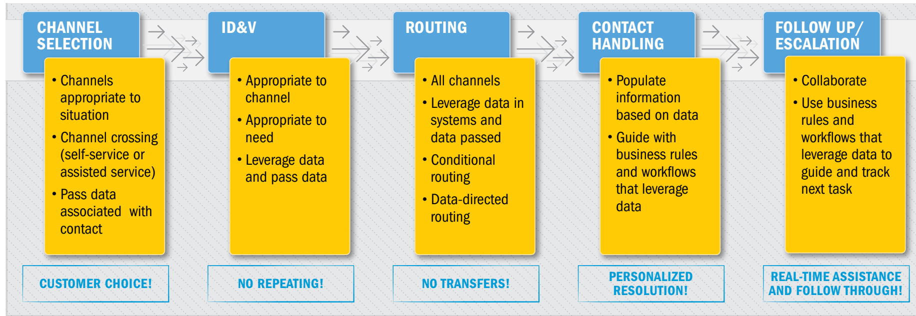
Three critical technology enablers stand out when considering why people seek assisted service and the things you have to think about to deliver an exceptional customer experience.

1. LEVERAGING DATA

For best-in-class service, use data to customize menus, messages and routing for specific customers or situations. Associating data with a contact is the enabler for identifying and verifying customers, routing them to appropriately skilled resources, and launching conversations based on scripts and business rules.

Sources of data include the website, web portal or mobile app where customers log in to their specific accounts. When customers call, the network or IVR can provide information about caller identification and call purpose. The identification leads to more valuable data in CRM and CIS systems, such as customer account status. A variety of other internal sources can reflect corporate data (e.g., status such as outages for utilities or flight info for airlines), or queue and agent data. External data sources from the "Internet of Things" can provide additional useful information such as location, status on devices, current events or other data specific to the industry, company or customer.

FIGURE 1: Effective Use of Technology Creates a Positive Customer Experience



2. USING BUSINESS RULES AND DEFINING WORKFLOWS

Business rules take advantage of all that data and act on it—in routing, contact handling and more. Think of business rules most simply as "If this, then that…" logic applied to optimize the customer experience. Workflows simplify and automate processes and take the guess-work out of how to deliver a consistently great customer experience.

The first place business rules may come into play is the channels offered. For example, email, chat or text is not a secure option to share financial information without completed login or ID&V, so these channels wouldn't be offered for these types of situations.

Data-directed routing is business-rule driven and can be based on defined classifications of customers, situations, status, etc. Ideally, this intelligent routing leads to first-contact resolution (FCR) and minimizes transfers. Business rules empower the agents to become resolution resources, giving them the right contacts to handle, and presenting the right information at the desktops (up front via "screen pops" and as the progress through the interaction). Workflows based on business rules define what to do with a contact once the logic conditions are met, whether it is information to provide, options to offer, or additional steps to take on behalf of the customer. Business rules create "smart" desktops with proper guidance and dynamic scripts, rather than treating all customers and situations the same and using forced word-for-word scripting. After the interaction, workflows can aid in contact logging, notes, follow up or escalation.

The bottom line is business rules and workflows drive faster resolution, personalized service and consistent outcomes for a given situation.

3. INTEGRATING CHANNELS

The "omnichannel customer journey" is all the buzz, but it's not possible to deliver exceptional service on that journey without integrating channels. A customer starting on a mobile app transitions to chat, email or a call using "visual IVR." A website inquiry turns into an email or chat, or even a web call or video call with WebRTC. A customer securely logged into a web portal can send a secure email or trigger a chat session. Or that website or mobile app offers up a "call me" option that triggers an outbound call to the customer number. None of those scenarios meet the goals for low level of effort without channel integration.

As mentioned above, the point at which the journey moves to assisted service can vary by channel, customer choice, and the situation, with a natural transition (e.g., IVR to call) or a channel crossing (e.g., start on web, pick up phone and call). Channel integration enables the customer to move from self-service to assisted service, and from one channel to the other easily and seamlessly. The technology basically packs the customers' bags with data to take with them on that journey. True omnichannel implies that data about the customer and their current activity is accessible as the customer travels across channels to make the next stage of the interaction simpler and a better customer experience.

Performance Tools Play a Key Role, Too

We can't forget to mention the important role performance tools such as reporting and analytics, quality monitoring and voice of the customer play in optimizing the customer experience in assisted service. These tools are critical to knowing what is happening on contacts and to gaining insights into potential targets for improvement, whether through coaching agents, gathering more data, altering or adding workflows, or further integrating as channel use continues to evolve.

Consider Each Stage of the Contact Cycle

An exceptional customer experience with assisted service isn't just about the interaction between an agent and the customer. Technology, applied effectively, can ensure that each stage of the interaction cycle meets expectations and adds value. Figure 1 shows the key steps in an interaction and highlights important considerations for an optimized experience along the way.

A wide variety of contact center tools come into play in making the best customer experiences happen. Table 1 maps the stages in the contact cycle to our key technology enablers, and highlights some of these tools and how they apply.

The Technology-enabled Human Touch

The path to a better customer experience starts with a review of your current technology. Define and fill gaps to ensure that you can meet expectations at each step of the interaction. It will pay off in that elusive low level of effort for your customer, which boosts customer satisfaction, and maybe even loyalty and revenue! On top of that, you'll drive benefits for your center such as increased FCR, decreased handle time, reduced training time and better accountability, all of which enhance the bottom line.

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TABLE 1: Technology Enables Each Step of the Assisted Service Contact Cycle

	KEY TECHNOLOGY ENABLERS		
STAGE IN CONTACT CYCLE	**LEVERAGING DATA**	**BUSINESS RULES/ WORKFLOWS**	**CHANNEL INTEGRATION**
Channel selection	Each channel offers ways to capture information actively (e.g., prompts) and/or passively (e.g., network information such as ANI and DNIS) Data must move with the contact	Business rules may “force” a channel change or exit from self-service, or define which channels are available for a particular situation	Customers start in their channel of choice—seeking direct assistance or first trying self-service (from which they may opt out or fail) Must pass data so it’s available from channel to channel
Identification and Verification (ID&V)	Simplify ID&V by leveraging data Pass data gathered and indication of successful verification	Business rules can help define the level of ID&V needed for a given situation	Must pass data so it’s available from channel to channel
Routing/ Contact Delivery	Leverage basic data for conditionals and skills in ACD; use more advanced internal and external data for data-directed routing in CTI	Every routing decision with a condition is a business rule, and business rules drive what to pop on arrival at the desktop	Multimedia routing engines apply to a variety of channels—voice, email, chat, text, social
Contact Handling	Data drives screen pops of customer information, knowledge presented, scripts, etc.	Business rules and workflows are leveraged significantly throughout contact handling—in CRM, scripting, KM, etc.	Contact handling should leverage what has already been done on other channels Agents may shift a conversation from one channel to the next (e.g., chat becomes a call)
Follow Up and Escalation	Data can help define follow up or escalation needed (e.g., based on customer status)	Workflows in CRM or business process tools define downstream activities and accountability, or level of empowerment to complete an action	Agents may collaborate across channels during or after a contact through visibility to presence and use of IM, video, screen sharing

VIRTUAL ASSISTANTS STRADDLE SELF-SERVICE AND ASSISTED SERVICE

VIRTUAL ASSISTANTS (VAs) help customers self-serve through a friendly (but non-human) agent that has answers to many questions. They bring character to self-service applications. IVR speech recognition “personas” have taken on this role for callers, with success hinging on a great user interface, well-built and tuned vocabulary, and strong logic (or business rules!) to make the interaction conversational and helpful.

Websites, including mobile versions of them, are increasingly offering these tools as well. With a healthy investment of time up front to define the right questions and provide helpful, digestible responses (both in language customers use), VAs can offload some of that human workload and provide customers answers they need at all hours.

Some think of VAs as “avatars,” and some companies have created great personalities out of them. Rumor has it that Amtrak’s “Julie” has received proposals from some charmed customers! She started on the phone and is now on the web as well. Check her out (1-800-USA-RAIL or www.amtrak.com) for an example of how technology can straddle the line between self-service and assisted service. Or visit www.goarmy.com where “Sgt. Star” can help you out and even explains, “Just type in your question just as though you were chatting with a live recruiter.” His YouTube overview claims he is both “handsome and smart!” and even has a sense of humor.

INNOVATION ENHANCES ENABLERS

THE LATEST ARCHITECTURAL INNOVATIONS by contact center technology suppliers make it easier to leverage data, integrate channels and define workflows. Vendors offer open development platforms that they, their partners or even their customers can use to build modular tools to gather and use data. The interfaces on these systems can make it fast and easy to develop and pilot applications.

This improved application development environment changes who can use these systems and data, how they use it and how agile they are at doing the next great thing. For example, an identified business need could quickly be turned into an application that stores information gathered at each step in a customer interaction (regardless of channel) so that it is available to workflows. It then builds the workflows to use that data in routing and information to populate and gather at the desktop, and steps to drive closure of the contact. These applications could address vertical needs (e.g., for utilities or credit unions) or horizontal needs (e.g., for trouble ticket capture or upsell). Enterprising companies could offer applications through a "store," enabling others to readily benefit from their efforts.

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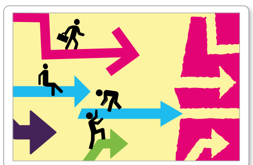

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