CONTACT CENTER PIPELINE
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OPTIMIZE TECHNOLOGY VALUE

“Buy new where you must, but think first about how to use what you have well, or add to it to do more.”

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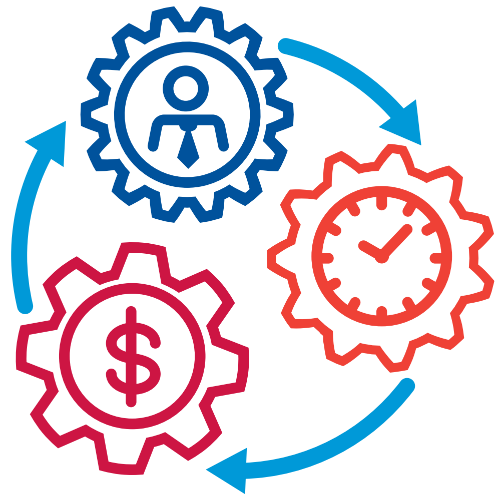
Success depends on how you use technology—new or old.

BY Brian Hinton, Strategic Contact



Many contact center leaders are dissatisfied with their current technology. They believe that new technology is the key to achieving business goals. Yet many centers have substantial opportunities to optimize efficiency and improve the customer experience by getting more out of what they already have. Moreover, the challenges centers face won't be fixed with new technology alone. Success depends on how you use technology—new or old.

In this article, we'll share our view of the most underutilized technologies and provide suggestions on how centers can improve performance with renewed focus. **FIGURE 1** provides a foundation for our discussion.

Expand the Role of Data

Contact centers should review the information contained in their enterprise databases to see if they are getting the most out of this treasure trove. This review should leverage internal (agent) and external (customer) perspectives. For customers, data can be used to create a concierge experience, thereby communicating "we know you." For agents, data-directed routing and guided contact handling helps them interact efficiently, with targeted information.

In the old days, using data in your contact center telephony processes via CTI (computer telephony integration) was expensive and complex. Only the larger centers had the resources to implement "screen pops." With customer information systems (e.g., CRM or core enterprise systems) evolving to browser-based and centers using SIP and web services, CTI should now be a given for everyone!

Use Effective Routing

One of the most impactful ways to improve your agent and customer experience is more effective routing. Many centers have not implemented skills-based routing well, or at all. The same can be said of conditional routing. And don't get me started on prompting: Customers' first impressions of contact centers are often bad ones.

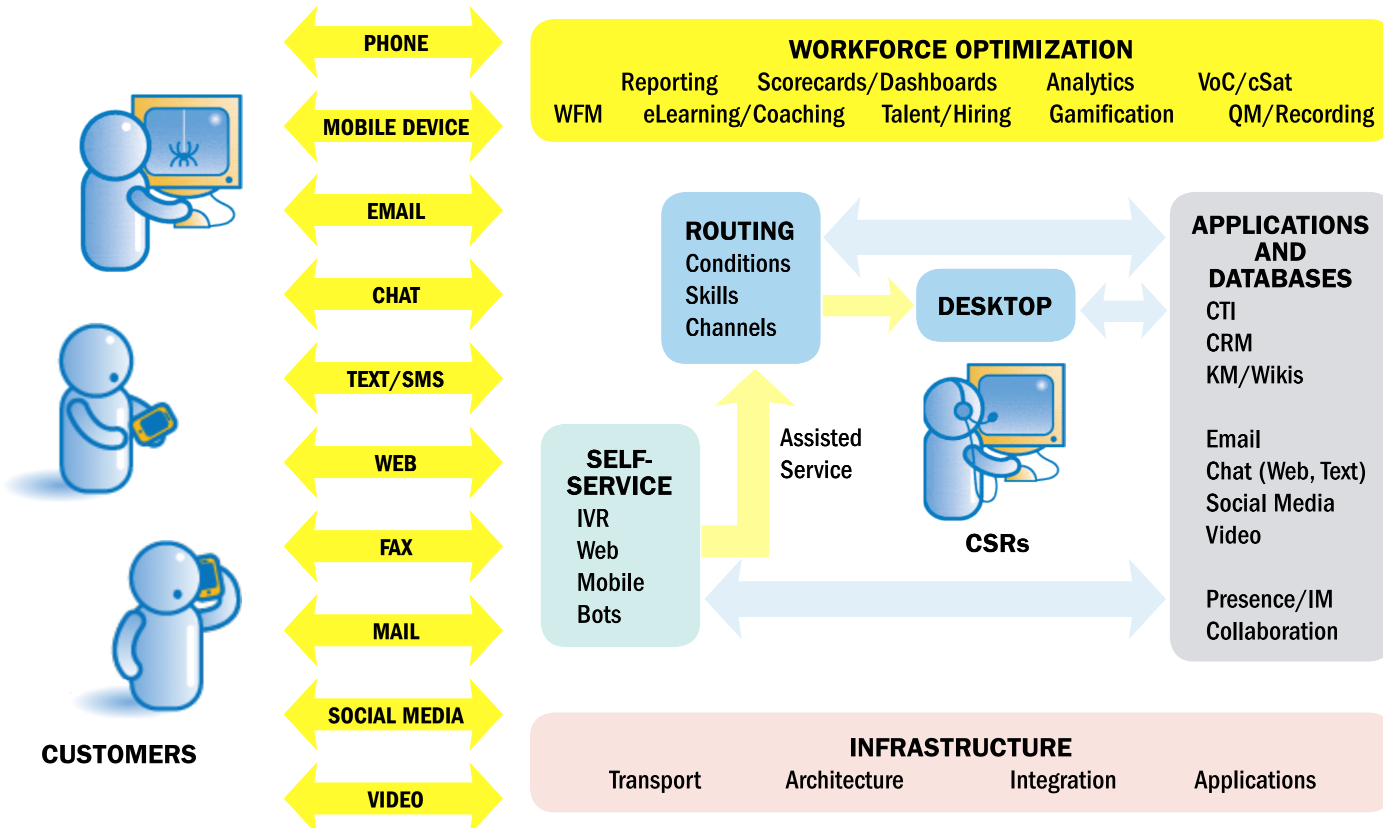
Skills-based routing often falls victim to the premise that all agents can handle all calls. On the surface, it seems like a good strategy for maximizing efficiency. In reality, there's often a steep learning curve before agents really are competent and comfortable fielding all kinds of contacts. Moreover, when skills-based routing gets implemented in these settings, it's often set to deliver calls to these "universal agents" at the same priority. It frustrates customers who experience long hold times only to find that their agents lack the true skill level to address the more challenging requests.

Phone prompts help callers self-select for routing to agents who have been specifically trained to handle their call types. Skills may be added to the agent profile as proficiency develops. Be sure to strike a balance between calling out more advanced transactions without over-segmenting skills into small, inefficient workgroups. Review your phone prompts to ensure each prompt is adding value to the customer experience and facilitating the connection with specially skilled agents. Otherwise, consider getting rid of the prompt.

All centers should give careful consideration to how data could be used to identify the customer and call purpose for routing based on what you know. It can spare customers the tedium of listening to unnecessarily lengthy prompts. Vendors use terms like "context-based" routing to tout this capability. It's really just the latest incarnation of data-directed routing, which has been around for over 20 years. It's time to do it!

The mechanics of "context-based" routing are rather straightforward. Identify the customer using ANI or IVR-entered account/customer #, (or biometrics for advanced centers), then use available data on the customer, the contact and transaction history, current status, external data, etc., to apply business rules and/or categorization. Then, offer only relevant prompts for the customer's profile and situation. You may be able to predict the call purpose and route to the most appropriate agent, or offer customized service based

FIGURE 1: Contact center technology—a foundation for our discussion



on the customer's relationship with the company. At the very least, you should acknowledge that you know who is calling by personalizing the experience.

Don't forget omnichannel! While many centers still predominantly handle voice calls, channel diversity and customer expectations put pressure on centers to route contacts properly across all offered channels. Routing tools should be deployed for each media you handle, with associated reporting and metrics. Ideally, routing should be seamless and integrated across channels such that customers can get the same high level of service when they use their channel(s) of choice or switch between them.

To begin, take inventory of your options, develop a plan and pursue smart routing with email, chat and text/SMS. Look for opportunities to extend your "ACD routing" to other media through additional licensing or add-ons. If your CRM is a plausible option for a routing engine (typically for non-voice media), consider how you will integrate across channels. If you use standalone routing tools (e.g., a separate cloud solution for web chat), define plans to integrate or replace.

Manage Performance

While the market hype focuses on analytics and employee engagement tools, many centers need to be more effective in using their current, basic performance management tools (reporting, WFM and QM) first.

Reporting is perhaps the top area every center should be targeting to get more out of their current technology. Many centers are dissatisfied with their current reporting or are reinventing the wheel in Excel. There are ways to optimize now. Start first with revisiting the capabilities of your current tools and any available add-ons. Remember: The measure of success is not report creation. Many centers proudly produce a plethora of reports that few ever really review or use. Reports should be based on strategy, not data dumps. Get the right information to the right people at the right time, in a format they can readily consume and act on.

One of the best approaches to identifying and distributing relevant reports begins with creating performance scorecards for every role within the contact center and up the chain of command. They reinforce center outcomes and goals, and can be powerful in showing the contact center's contribution across the organization. Desktop dashboards provide a real-time view with visuals (e.g., widgets to reveal status and graphical trends for easy interpretation).

Tuning up your WFM provides a large upside potential to improve workload projections and staffing for both efficiency and a better customer experience. If you have WFM, it may be time to gain some expert advice to ensure you are using it effectively for forecasting volume, projecting staff

requirements, and scheduling staff. You could also explore its capacity to support time off requests, shift bidding, agent visibility, etc. If you don't have WFM, you can use Erlang queuing concepts in your staff analysis through low-cost tools that can be downloaded as independent apps or added on to Excel. Consider all media that you handle in your workload forecasting (read "Moving Beyond Phone Calls: WFM in an Omnichannel World," *Pipeline*, December 2016).

QM is typically used more effectively than WFM. However, if you are simply recording calls and then scoring and reporting on the results in Excel, explore using the quality monitoring component or your recording solution. With it, you can build scorecards and automate reporting. Look for trending and calibration capabilities, as well. If you are not licensed, find out the cost of adding the required licenses. Screen recordings are a powerful addition to QM that can provide insights into how people are using systems and adhering to processes. They even expose (or deter) issues like distracted chatting or surfing.

For an external view of quality, pursue post-interaction surveys that relate to one interaction and one agent. Surveys can be done through an IVR vendor or a performance tool vendor. Many companies have the functionality but use it for higher level NPS surveys and miss the opportunity to learn how customers perceive the interaction they just had while it is still fresh in their minds.

With solid reporting and effective use of performance management tools, analytics can be the next focus. While many want to add speech, text or desktop analytics, data analytics for a more comprehensive view of center performance should be the first priority. Almost every center wants to see a picture of what's going on beyond just ACD data. The typical approach is to push ACD info to an enterprise business intelligence component or combine data from multiple sources manually in Excel—neither of which is typically optimal for the center. Start by seeing what your reporting application already provides. Many have a capability to combine data from multiple sources and build/schedule reports that combine the data—hopefully in scorecards and dashboards—and enable drill-down into root cause and actionable insights. Once that is in place, then pursue speech, text or desktop analytics if you have the resources to work with the tools.

Read Lori Bocklund's special report, "Workforce Optimization Survey: Time for the Next Level" (*Pipeline*, July 2017), for a deeper understanding of how you compare to other centers in your progress with WFM, QM, reporting and other WFO tools.

Advocate For Optimizing Outside the Center As Well

Contact center leadership doesn't "own" all the technology that impacts them. You'll need to work with your peers to present a coherent front to customers across all channels.

Your website and mobile app need to be robust, easy to use, and replete with self-service options. Both need the option for assisted service with integration pathways that sustain a "seamless" customer experience.

Collaboration (IM/Presence) is most often an enterprise application. The contact center should use this tool to avoid getting up or sending email to find help. When support from other departments is required (e.g., ones that can quickly help an agent resolve a contact, or could be tapped for an approval or handoff in real-time), an IM tool that includes enterprise presence can be the most efficient contact method.

CRM is typically an enterprise application but the contact center can benefit from workflows and integration to other tools (including knowledge base). Again, lobby your peers for support in optimizing enterprise applications in ways that confer benefits to all departments.

Optimize Knowledge Aids

At the desktop, the biggest opportunity to use technology more effectively lands squarely on knowledge aids. Even if your "tool" is just an online "intranet" or portal, or you are using SharePoint, it can be highly valuable to agents IF the content is trusted and structured in a way that is easy to use. To that end, ensure your articles are up to date, accurate and understandable. Assign an "owner" for overall management—deleting, updating, reviewing, etc.—and make sure they cultivate direct input from the users. Online resources must be organized effectively and allow keyword and phrase search to find appropriate content. Searches should take agents to targeted results, not laundry lists of documents that they have to plow through.

It's Not Just About Technology

Doing more with technology is an exciting opportunity, but it's not just about more licenses or infrastructure. You need qualified, trained support resources to use it effectively—whether optimizing menus and routing paths, developing and maintaining knowledge content, or applying performance tools. And those resources need to have focus and accountability—not "do it in your spare time" jobs. They need to apply the tools effectively by working with vendors and users to configure them in service of your business needs. They also need training on all components to ensure that all users (including leadership) understand the potential and value. Buy new where you must, but think first about how to use what you have well, or add to it to do more which optimizes technology, budget and business value.

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