EVERYBODY HAS DATA, BUT WHAT ARE YOU *DOING* WITH IT?!
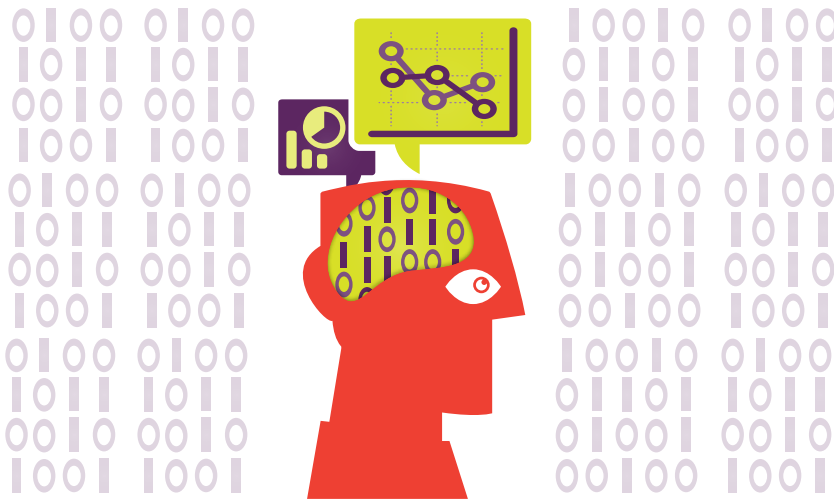
"Data has always been important, but the needs and opportunities are growing."

Contact Center
Pipeline

EVERYBODY HAS DATA, BUT WHAT ARE YOU *DOING* WITH IT?!

It's time to get more out of data.

BY LORI BOCKLUND, STRATEGIC CONTACT

Contact centers have always had an abundance of data about customers and performance. Unfortunately, that data is not being fully utilized to benefit the company, customers or agents. The unrealized potential of data has never been more urgent than it is right now, as centers focus on the customer experience and agent experience and the excitement builds around new capabilities in automation and intelligence.

Data, Data Everywhere

Let's talk about two sets of data: the first is about customers, and the second is about their interactions and how they are handled.

In order to serve customers, centers need *good, complete, up-to-date* data about them. Names, addresses, contact information are the starting points for a customer profile, but details like preferences and affinities lead to customized and personalized service delivery. Contact history is another incredibly valuable data element, ideally across all channels (the proverbial "omnichannel"—including online, mobile and face-to-face locations such as stores, branches and kiosks). Customer information is gathered and maintained in Customer Relationship Management (CRM) solutions, home-grown tools, and/or systems that serve the core business (accounts, orders, billing, etc.).

Customer data can be less than stellar when it has not been a focus of the center and the enterprise to capture and maintain it. Common issues include no data fields (e.g., contact history), unpopulated fields (e.g., email), and data in the wrong places (the increasingly important mobile phone numbers are notorious here). Unstructured data is also common, originating from good intentions about capturing information for which no specific field has been defined. For example, a simple "workaround" to capture notes about who to call, which number to use, or a customer preference can quickly become unwieldy. It is no small task to transition these notes to structured information in specific data fields that can readily be used in business decisions and automation.

Our second data category about interactions and their handling is a focus of many vendors in our industry—ACD, IVR, QM, WFM, etc. All these systems generate mountains of data about every contact, the center's performance and what agents are doing. The vendors create countless "standard" reports using that data, and tools to help customize or configure "custom" reports. Going a step further, many tools facilitate creation of dashboards for real-time visual views, scorecards to show performance against goals and trends, and analytics to dive deeper into data, relationships and root cause. **FIGURE 1** defines and differentiates data, reports, dashboards/scorecards and analytics.

Sadly, the most common use of all that CC data seems to be to dump some of it into Excel and reformat it and consider a report creati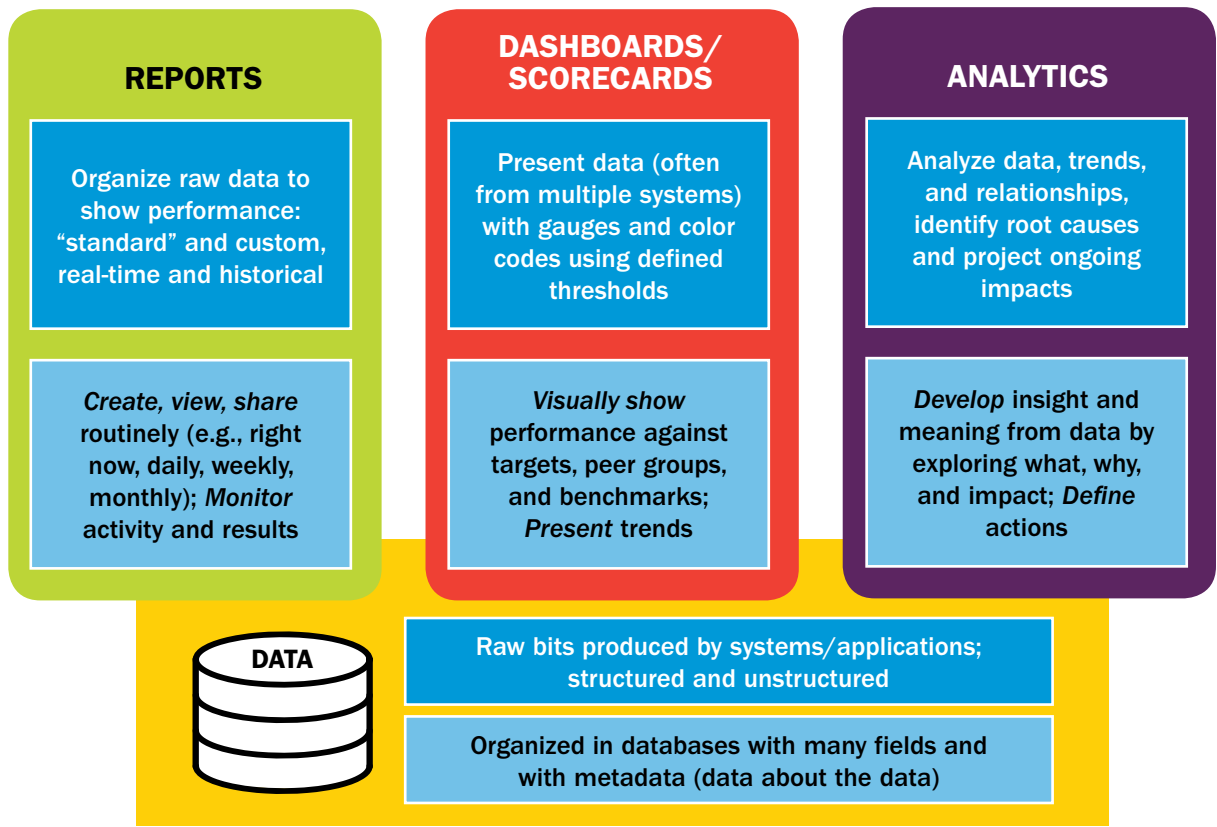on "mission accomplished." That doesn't come close to serving the day-to-day needs of the center or fulfilling the strategic potential.

Giving Data its Due

If we're going to give all this data its due, we need to take a new approach, on both fronts. Centers could prioritize a "clean-up" effort on customer data, accompanied by process refinement to ensure the data stays clean and continues to be updated. That task

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FIGURE 1: Differentiating Data, Reports, Scorecards/Dashboards and Analytics

	REPORTS	DASHBOARDS/ SCORECARDS	ANALYTICS
What	Organize raw data to show performance: "standard" and custom, real-time and historical	Present data (often from multiple systems) with gauges and color codes using defined thresholds	Analyze data, trends, and relationships, identify root causes and project ongoing impacts
How Used	*Create, view, share* routinely (e.g., right now, daily, weekly, monthly); *Monitor* activity and results	*Visually show* performance against targets, peer groups, and benchmarks; *Present* trends	*Develop* insight and meaning from data by exploring what, why, and impact; *Define* actions

DATA

Raw bits produced by systems/applications; structured and unstructured

Organized in databases with many fields and with metadata (data about the data)

is not trivial. It may require IT to create new fields. It requires well-defined processes for agents to know what and when to update (e.g., not when the queue is all backed up!). And it may point to the need to engage external sources to help with information such as phone numbers given their importance in the identification and verification (ID&V) process, as well as potential for outbound communications such as confirmations and notifications. **FIGURE 2** provides a high-level view of the clean-up that beckons for many.

When it comes to the volumes of data from the CC tools and all the work that vendors have done to make this data useful, it's time for many centers to hit "refresh" on how these tools get used. Start with some questions:

- Are people using the reporting tools? Trained on them? Know how to configure or customize?
- Do we have resources with the right skills and training to help? These could be analysts in the center or other areas, including IT or a Business Intelligence (BI) group.

- Does the vendor offer some online training or other ways to deep dive into the tools, what they can do, and how progressive centers are using them?
- How can we present data in useful and appealing (maybe even fun!) fashion to the frontline staff to drive the behavior and results we seek? What should we be presenting to leadership to show the center's performance and contribution to the business goals?

Integration and normalization must be part of advanced use of data to pull together information from multiple systems to develop insights and drive actions. Look at vendor tools as part of this endeavor—many provide paths to integration. IT and BI groups may again play a role: Consider your enterprise strategy and tools for data warehouses and BI in addition to your contact center-specific tools and data.
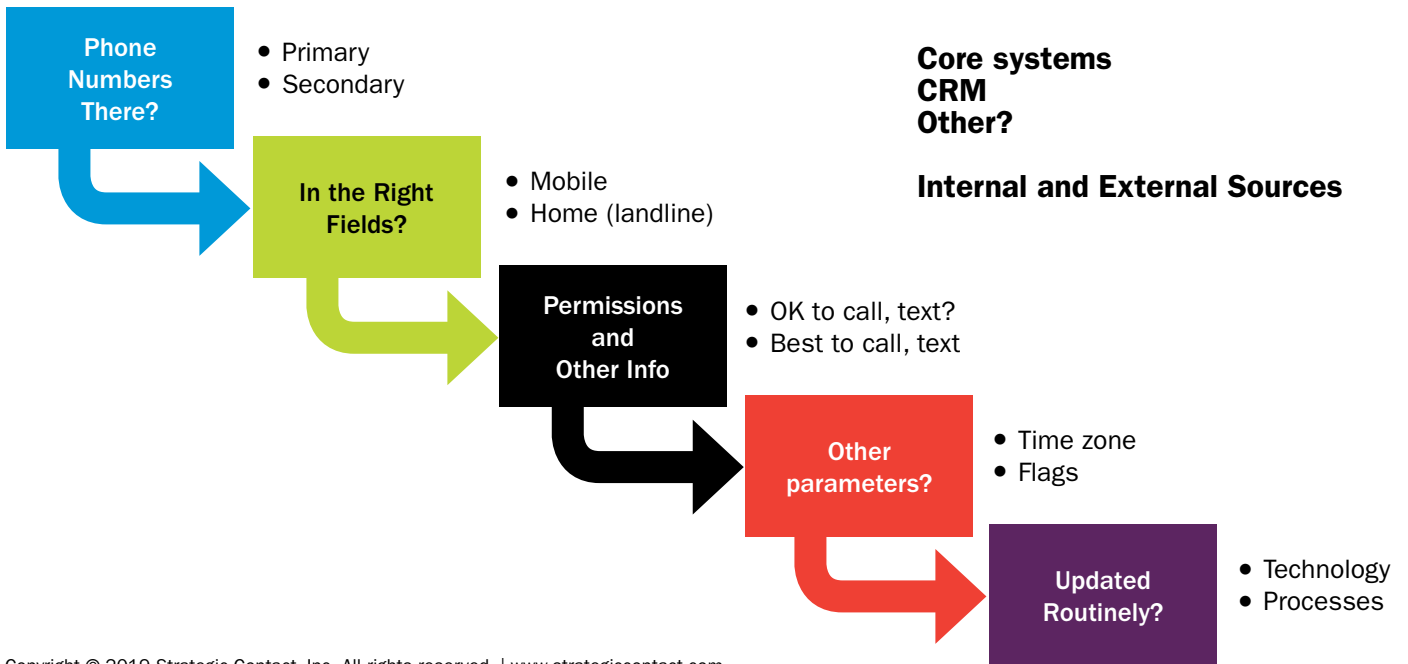
We Ain't Seen Nothin' Yet

Data has always been important, but the

needs and opportunities are growing. Think how important good customer data is to things like appointment reminders, ID&V, screen pops and outbound dialing. All of these examples are things people have been doing for years (if not decades), and they are constantly hindered by data issues. Now think about what you would like to do with data to personalize your customer experience, make it easier for your agents to succeed, and drive changes that will deliver the efficiency and effectiveness your center is charged to deliver (**SEE FIGURE 3**).
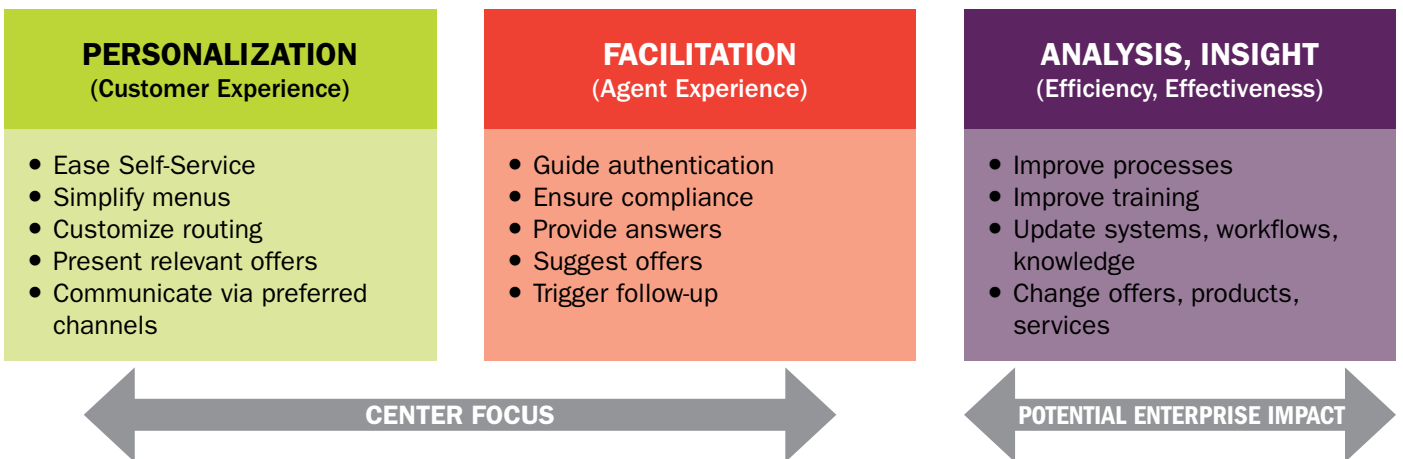
Companies are putting great hope in the future of self-service—whether IVR, mobile or web-based—and that hope can only be realized if the customer data is *great* and the data about interactions is used to optimize applications. Customers' motivation to use self-service can aid in getting profile data updated, whether they do it themselves or through an agent. Similarly, the pain of authentication (and growing demands for fraud prevention or regulatory compliance)

FIGURE 2: Clean Up Your Customer Data

Phone Numbers There?
- Primary
- Secondary

In the Right Fields?
- Mobile
- Home (landline)

Permissions and Other Info
- OK to call, text?
- Best to call, text

Other parameters?
- Time zone
- Flags

Updated Routinely?
- Technology
- Processes

Core systems
CRM
Other?

Internal and External Sources

FIGURE 3: Opportunities to Use Data

PERSONALIZATION (Customer Experience)	FACILITATION (Agent Experience)	ANALYSIS, INSIGHT (Efficiency, Effectiveness)
• Ease Self-Service • Simplify menus • Customize routing • Present relevant offers • Communicate via preferred channels	• Guide authentication • Ensure compliance • Provide answers • Suggest offers • Trigger follow-up	• Improve processes • Improve training • Update systems, workflows, knowledge • Change offers, products, services

◄—— CENTER FOCUS ——►   ◄—— POTENTIAL ENTERPRISE IMPACT ——►

may motivate both customers and those who serve them to focus on data updates to streamline that process.

It is increasingly difficult to hire, train and retain the agents to handle ever more complex contacts, so we need data to help guide them through the contact-handling. There are boundless opportunities to learn from interaction data to improve and automate processes, make the case for changes or investment in systems and applications, revamp training,

or even change what marketing or product leaders do.

All this data opportunity will be even more important as contact center professionals transition from the excitement stage to the execution stage on a number of "hot" topics:

- **ARTIFICIAL INTELLIGENCE** has a prerequisite: Lots of data, and good data. Anyone embarking on an AI project will quickly find that a critical early step is to clean up the data.

- **BOTS,** whether text- or voice-driven, will rely on data and will generate data. Their design and optimization must be heavily steeped in the world of data, reports and analytics.

- **INTELLIGENT AUTOMATION** (IA) is another buzzword these days, manifesting in things like Robotic Process Automation (RPA) that can be unattended (triggering off events or data) or attended (working with agents). Clearly that requires good, structured data that the IA can use to make decisions (if...

AS USUAL, IT'S NOT JUST ABOUT TECHNOLOGY

We routinely advise clients not to pursue new technology if they won't make the process changes to get the value from that technology, or they won't have resources to use the technology effectively. We have even heard vendors chime in on that message. Technology that uses data is the most profound example of that warning. Those that get the most out of their solutions are the ones with a continuous improvement mindset and the processes and resources to make change happen. Whether it's analytics tools, bots or AI, your business case is not complete without considering what you will do differently with that tool, and the support resources that are required to make it happen.

then...). And IA will get better if data capture shows what is working (e.g., achieve resolution, shorten tasks or turnaround times) and what is not, so processes can be tweaked.

- **KNOWLEDGE MANAGEMENT** (KM) improves based on data—what people are asking about, what is a useful outcome and what is not, what can prevent another contact, etc. Using data to optimize KM will increase agent success and customer self-service.
- **PERSONALIZATION** is nothing new but

has often failed to materialize because of bad data or the lack thereof. Good data is essential to intelligently route, offer up custom menus, and otherwise guide customers to their best outcome.

So What Are YOU Doing?

Contact center professionals—whether in operations or technology—know they have lots of data and many will acknowledge it is underutilized and doesn't get the attention it needs. So now the question is, what are you

going to do about it?

Build a phased plan—or two plans—for how you will use customer data and interaction data. Include the "fixes" needed to clean up and structure customer data and start to use interaction data in new ways. Make changes on a tactical level to drive quick benefits like going deeper into what could be done with the tools you have and pursuing training (or a refresh) on those tools. Position yourself to use data intelligently in more advanced or complex applications. Commit resources and plan for process change, too (**SEE THE SIDEBAR**). With a continuous improvement mindset to keep using data well, the insights and actions they drive could deliver astounding changes. ◉

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Contact Center Pipeline is a monthly instructional journal focused on driving business success through effective contact center direction and decisions. Each issue contains informative articles, case studies, best practices, research and coverage of trends that impact the customer experience. Our writers and contributors are well-known industry experts with a unique understanding of how to optimize resources and maximize the value the organization provides to its customers.

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