

Tech Line



Pursue Strategy and Governance to Ensure Multichannel Technology Optimization

By Lori Bocklund, Strategic Contact

Collaboration across departments is critical to provide a quality customer experience and effective use of resources.

Multichannel customer contact is a fact of life. Unfortunately, so are organizational silos and divided ownership of the many media that your customers use, or want to use. In an increasingly complex customer interaction environment, there's no time like the present to establish a corporate body and processes to comprehensively define and pursue your offerings. This organization must establish a clear strategy and have the power to govern technology investments and their application across the enterprise.

A likely response is: "We've tried, and it doesn't work. Even customer interaction through the web is out of our control." Or perhaps: "It's not worth the trouble; we're heads-down handling the voice contacts and email in our center and that's enough. It's most of the company's volume anyway." *I hear you.* But as new channels gain traction or "take off," the center has a high stake in initiating the collaboration that is critical to ensuring that *your company* takes care of *your customers*. Nobody knows them better than you do. So bring that knowledge of the customer experience to your leadership and say it's time for a common vision of how we interact.

tichannel customer contact? For that matter, what's a channel?" Unfortunately, it's not a one-size-fits-all term, but recognizing that can be a start to ensuring effective collaboration with your colleagues. A "channel" can be:

- a **marketing** channel—meaning the way in which we deliver a message to a customer or prospect
- a **communication** channel for customer interactions—e.g., voice calls, email, chat
- a **sales and/or delivery** channel—e.g., a branch or storefront, the web, the contact center and the associated fulfillment mechanisms

Which of these "channels" need to draw the contact center's attention? They *all* do, in some form or fashion. Customers don't care about the internal workings of your organization or the means through which you establish ownership for the various mechanisms through which they interact. They simply want a consistent, high-quality experience no matter which "door" they enter. That means:

- Know who they are, what they prefer, their relationship with your corporation and interaction history

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All "Channels" Are in Play

Before we dive into questions of strategy and governance, it's fair to ask: "What do we mean by mul-

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- Speak with one corporate “voice” (uniform brand messaging, product/service information, customer-specific data)
- Understand the spectrum of services with which they might interact (and how to navigate through the corporate maze to access them)
- Provide effective and consistent user interfaces across self-service and assisted service options
- Establish performance levels that are in line with the choice of media—for example, immediate response for real-time contact; reasonable delay for the rest
- Make their transition from one “channel” (or department) to another as seamless as possible

In short, they want you to present a united front to the outside world. It’s a deceptively simple request that is not so simple to achieve. Disparate organizational units march to their own drum beats with different agendas. It’s challenging to agree on funding and prioritization, yet it’s absolutely crucial to make that happen—both for the sake of the customer experience and for making effective use of our increasingly scarce corporate resources.

Set the Stage with Strategy

A key step in creating that unified front is to create a comprehensive multichannel strategy. As you take stock of the current environment for customer interaction, current “ownership” and organizational responsibilities are a piece of the puzzle that will emerge. That insight will point you at the crossfunctional team that needs to come together to pull off this daunting task: finding a way to bring all these channels into a cohesive strategy to support the customer needs and expectations while also delivering value to your company.

Start with a discovery process that takes inventory of the ways customers currently interact for various contact types, as well as the technology in place to enable these interactions. Gather the critical business drivers that the strategy must consider, along with the elements of corporate strategy and operational goals that will influence channel priorities. This information helps to create a common understanding of the starting point and begins to lay the groundwork for the

opportunities that lie ahead. As Figure 1 shows, a multichannel strategy must consider self-service, assisted service and proactive service—all critical elements of a comprehensive view.

Figure 2 shows the key steps to building a multichannel strategy. Ideally, a crossfunctional team conducts these steps together. The process moves through discovery to requirements to vision, and then dives deeper into how to bring that vision to reality. Ultimately, the team maps contact types and applications to the various media, conducts gap analysis, and prioritizes initiatives to define a plan and timeline. An outgrowth of that effort is the planning for impacts—on the internal people, processes and technology, as well as the customer. In a perfect world, your team pitches that cohesive multichannel strategy to a crossfunctional steering committee that has ongoing strategic responsibility.

Multichannel Governance Controls the Action

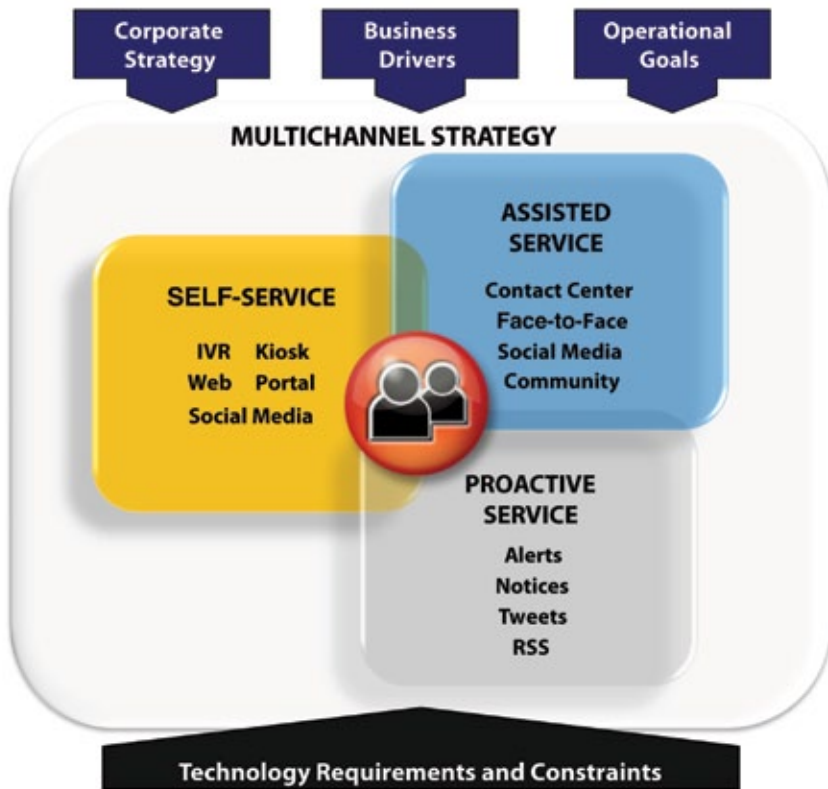
An exquisite crossfunctional, cross-channel strategy is of little use without a means to establish and sustain dialog, decision making and collaboration. It’s far too easy for the collective to turn to their respective turfs and conduct business as usual. Let’s face it: Collaboration can feel like giving up control, power, resources and autonomy. And it’s hard to gain agreement on priorities and the myriad decisions on people, processes and technologies when the number of eligible voters increases. It’s easier to simply run one’s own shop, full speed ahead. But a modest uptick in organizational coordination is the price of admission to serve the customer in excellence and be good stewards of corporate assets.

A multichannel steering committee assumes the mantle of responsibility for making intelligent investments in people, processes and technologies. They also oversee optimization of the quality and consistency of the customer experience across all channels while ensuring appropriate standards of operational efficiency. See Figure 3.

This committee can get—and keep—everyone on the same page, working toward common goals. They’ll define what is worth doing by linking proposed initiatives to strategic goals and identifying clear business benefits. They’ll prioritize resources—both people and money—and provide managerial oversight over approved projects. They’ll surface interdependencies across

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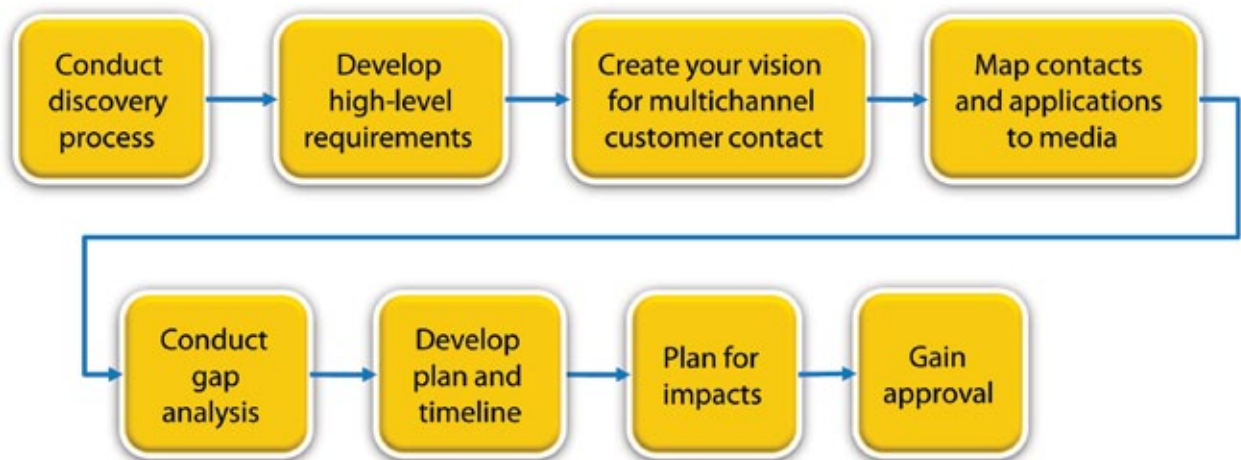
Figure 1: Multichannel strategy considers many factors



Evidence of Our Multichannel World

The overwhelming majority of respondents to our **2010 Multichannel Customer Contact survey** (<http://tinyurl.com/2010MultichannelSurvey>) support (or have plans to support) voice, email, fax, voicemail, IVR and web self-service. More than half support (or have plans to support) proactive outbound alerts, social media and web chat with nearly half giving the nod to mobile applications. They're at least waist-deep, and often neck-deep, in the multichannel world. Most companies get there a channel at a time with responsibility for channel management spread across many departments. It's time to bring some cohesion to that world.

Figure 2: Multichannel Strategy Planning Process



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channels and departments to ensure that the requisite “connective tissue” gets put in place for end-to-end service delivery. And they’ll hold the responsible parties accountable for results and mitigate risks to the project and the corporation.

As with the multichannel strategy, a governance structure doesn’t just happen in response to good intentions. It demands focused attention to these critical success factors:

- *Visible endorsement and support by senior management* to champion the strategy, build coalitions to support it, and create the desire for change
- *Representation from all stakeholders with customer-facing responsibilities* to establish a broad base of support, leverage distinct perspectives, institute peer review for major initiatives, and effectively promote the initiatives across the organization
- *Understanding of and allegiance to common goals and vision* to pursue a comprehensive strategy that delivers appropriate value to the corporation and the customer
- *Documented policies and procedures* that govern project submission, evaluation, rating/ranking, approval, monitoring and post-implementation assessment to ensure pursuit of the right projects in the right way and instill trust and confidence in the process
- *Oversight of investments and resource allocations across all customer contact channels* to set priorities that yield the greatest benefit to the corporation as a whole and leverage common tools and processes
- *Performance management* to measure tangible contributions to business goals—like improvements in customer satisfaction, first-contact resolution and retention—while balancing business and customer requirements
- *A formal change management process* to overcome resistance to change and dramatically increase the likelihood that projects will succeed (on time, on budget) and realize the expected benefits

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Figure 3: Multichannel governance requires ongoing crossfunctional engagement



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Cross-Channel Tools Enable the Strategy

The multichannel strategy and associated governing body must carefully consider the enabling technologies that support the customer-facing interactions. These technologies start with three foundational elements that are crucial for establishing a framework against which all service delivery mechanisms and the associated business processes hang.

The organization's **customer relationship management** (CRM) system captures customer profiles, preferences and interaction history. It needs to be accessible across all channels to lend context to the here-and-now communication and provide the personal touch that customers have come to expect. With the social world of Facebook, Twitter and more, CRM has never been more important.


Traditional channel reports capture results for selected key performance indicators (KPIs)—e.g., contact volumes, service levels, first-contact resolution, customer satisfaction. They're important elements of a multichannel metrics strategy. But now it's time to dig a little deeper to understand what is really happening across channels and within each channel. **Cross-channel analytics** trace customers' paths through complex interactions to pinpoint bottlenecks that prevent customers from completing self-service tasks successfully and/or drive repeat contacts. It maps results to specific experiences that influence customer satisfaction and identifies at-risk customers for proactive engagement.

It generates the hard data that supports business cases for channel enhancements, process improvements and training initiatives.

Finally, a **knowledge management or wiki** system provides a store of information for providing consistent responses to customer queries and issues, whether through self- or assisted service. It's the tool that equips the company to "speak with one voice" regarding the product/service offerings and customer-affecting policies and procedures.

While those three tools lay the foundation, many other technologies may come into play. Our next Tech Line article will address a spectrum of options to consider in planning.

Everyone Gets What They Need

A carefully constructed strategy, an effective governing body and the right foundational tools make it possible to optimize the customer experience while delivering on the organization's business objectives. Customers have the means to interact with the company using their preferred channel and enjoy consistent content and service quality. Finely tuned self-service offerings increase customer success rates, lower service costs and boost customer satisfaction. And close collaboration across departments improves end-to-end service efficiency and reduces errors, failed hand-offs and customer frustration. It really is a "win-win" and an excellent argument to counter any fears that may surface as you pursue crossfunctional multichannel success. 

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Online Resource

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