Tech Line

Use the Right Enabling Technology to Support Multichannel Customer Contact

By Lori Bocklund and Maren Symonds, Strategic Contact

Contact center technology considerations for your multichannel strategy.

In a world of expanding customer contact channels and the departmental silos that go with them, is it possible to optimize the customer experience and deliver on business objectives? The answer can be a resounding "YES!" given a carefully constructed multichannel strategy, an effective governing body, and the right people, processes and technologies to support them.

This article focuses on contact center technology considerations for your multichannel strategy. We start with the foundational elements that we believe every contact center should have. We examine the impact of multichannel customer contact on the technologies that you already have. And we talk about emerging channels and where they might fit with your business and operational goals.

Start with Foundational Technologies

Three foundational technologies serve as the "glue" to create a consistent framework for service delivery and channel management: customer relationship management (CRM), knowledge management (KM) or wikis, and cross-channel analytics. They serve three critical business objectives:

- Knowing who your customers are so that you can tailor your products, services and channels

to their collective and individual needs

- Delivering information about your organization and its products and services accurately, efficiently and consistently for internal and external consumption

- Managing all of your customer contact channels as an integrated whole to optimize both the customer experience and operational costs

Customer relationship management is the centralized repository of information that records detailed information about customers—who they are, what they prefer, the business units and channels with which they interact, and the inquiries or transactions they've pursued. It provides a consistent window into the customer relationship no matter which business unit or channel they engage. With the growing use of social media for customer contact, traditional CRM solutions are "going social." Products such as RightNow's Cloud Monitor, Oracle's Social Media Analytics, and Salesforce.com's Service Cloud monitor and analyze company mentions on social networks, flag specific items for proactive contact, and capture social interactions in customer records.

Knowledge management captures, manages and shares information. KM solutions mine repositories (databases, document libraries, → *page 2*

intranets, extranets, websites) in response to natural language queries and provide tools to add new information and insights. They're adept at managing the organization's intellectual assets as well as "tribal knowledge." Solutions built to realize in-house efficiencies can be extended to web self-service with appropriate screening, filtering, and security provisions.

Wikis can be a faster, lower cost alternative to KM solutions. They're collaborative, web-based applications that equip nontechnical users to create and edit any number of interlinked web pages using simple text editors. What they lack in capacity for mining existing repositories they gain in speed of information capture, organization, and presentation. (See "Collaborative Customer Care," *Pipeline*, December 2010.)

Cross-channel analytics is the discipline of measuring, analyzing and fine-tuning the quality, effectiveness, and efficiency of customer service delivery across all customer-facing channels. It is not merely a data warehouse that aggregates channel-specific data and produces combined activity reports. Rather, cross-channel analytics traces customer paths within channels, across channels, and across time as they complete (or attempt to complete) transactions and assesses what's working and not working by channel and across channels. It identifies opportunities as well as problem areas that merit investment in channel expansion or improvement, and provides the hard data to support business case development.

Use Core Technologies to Integrate Channels

We need to know something about customers when they initiate contact to route them to the right resources, provide appropriate treatment in queue, deliver pertinent details upon connection, and launch the right contact handling protocols. We're all familiar with how ANI, DNIS and caller prompting serve this function for voice connections, and we've traversed the learning curve to

Selection Criteria for
Cross-channel Analytics

If there was Pulitzer prize for achievement in ambiguous terminology, contact center "analytics" would certainly be in the running. Seemingly every vendor has a solution—e.g., speech analytics, data analytics, text analytics, performance analytics, customer experience analytics—with no consistent naming convention to describe the target use. While a detailed assessment of offerings is beyond our scope for this article, we'd suggest the following starter list of questions as you entertain vendor options for multichannel analytics:

- **Which modes of customer contact does your solution take into account**—e.g., store front, point of sale, kiosk, call center (inbound, outbound), self-service (IVR, web), proactive alerts, web chat, social media, mobility?

- Does the solution **measure cost per contact by channel and overall**?

- Do you **integrate with CRM to assess findings and yield insights** by customer segment?

- Do you have **a means to capture and report on the customer experience** at every step of their process within a given channel? As they cross channels? Can you identify exactly where and why problems occur and the actions customers take in response?

- Can you identify the percentage of each channel's activity that is directly related to **hand-offs from, or deficiencies in, other channels**?

- Can you identify **which agents, skills or sites drive repeat contact**? Can you tell which customer segments, products, services or business processes drive repeat contacts?

- Will the solution identify places where technology, process or people changes might drive revenue, reduce churn and/or decrease operating costs? Does it **pinpoint opportunities to drive customers to lower cost channels**?

- Does your solution provide a **graphical user interface that readily presents findings** and enables drill-down for detailed analysis? Can dashboards be tailored to the individual user?

- Are you **willing to invest in a "proof of concept"** to demonstrate the benefits of your offering and the ease with which the requisite technologies and processes can be put in place to support it?

Taking the Plunge with Social Networking

By Carlo Delumpa,
Principal, Hive Social Media

From gleaning insights over the Twittersphere to providing discussion forums for customer self-support, social networks have emerged as a way for companies like Comcast, BestBuy and Southwest Airlines to increase their support footprint.

How did these companies and others like them become proficient at social customer support? Here are a few key things they do well:

They listen for customer complaints, comments and compliments over their selected social networks. Using simple tools like Tweetdeck and Hootsuite, anyone can seek, find and track relevant conversations and respond to customers in near real-time. Listening takes a substantial investment in time to pour over conversations and decide what's relevant and what's not. While it's certainly possible to automate much of the listening and filtering with tools like Avaya's Social Media Manager, Cisco's Social Miner or Interactive Intelligence's Buzzient integration, listening still requires human interaction. Which brings me to the second thing these companies do well...

They integrate their social networking tools with their CRM tools. Companies like Jive and Lithium have integrations, or "connectors," to SalesForce.com and Siebel. Using a combination of a community platform with a CRM

system, companies can monitor support conversations, intercept and flag hot topics or issues, then use the CRM system to track resolution of the issue and attach it to the customer record. SalesForce.com's Chatter platform can be used internally to crowdsource a solution to a customer problem, then send the final solution back

out to the customer via the community. This closed-loop response system represents the nirvana of social network-driven support.

They are clear about their online-to-offline handoffs and processes. Social networks are great tools for engaging your customers, but let's face it, not every situation can be handled in 140 characters. At some point, it's more efficient to transition the customer to the call center. My cable company triages my issue and then provides me with a direct line to a support rep in case my issue requires more attention. And they usually do this in under an hour. Their processes are transparent, well organized and effective.

Social networking is an intriguing opportunity for contact centers. It's important to remember that social networks represent a channel and that engaging customers over social networks is still a very human endeavor. Technology can make that endeavor more efficient, but it will always be the tip of the iceberg where support costs are concerned. ⓟ

Carlo Delumpa

leverage this information. We need to extend that discipline to email, Web calls (VoIP, call-in, or call-back), web chat and text messaging and consider what data elements best serve contact management (e.g., names, email addresses, subject lines, URLs, Facebook or Twitter IDs, cell phone numbers for SMS).

Armed with information about our customer or prospect and the reason for the contact, each "media server" has the means to open a messaging stream with a multimedia routing engine: "Here's what I know about this contact (who, what media, from where, for what purpose). What should I do with it?" The routing engine can use a common set of business rules and skills to identify response mechanisms and resources, prioritize workload and manage service levels. Computer telephony integration (CTI) can then facilitate "screen pop" upon delivery. This "dialog" is relevant to all types of contacts as well as transfers within and across channels. All of the main players in the ACD/CTI market (e.g., Aspect, Avaya, Cisco, Genesys, Interactive Intelligence, Siemens) and hosted solutions providers (e.g., Contactual, Echopass, inContact) support multimedia routing.

Contact routing, handling and performance management will vary considerably by media, but the same tools that are essential to traditional assisted service channels apply to multichannel activity—workforce management, quality monitoring, etc. Some considerations as you assess staffing requirements, business rules, service levels, quality assurance and metrics include the following:

- Each medium is a skill. Agents have different comfort levels and talents with respect to voice, text and short-message communication. For agents skilled at chat, contact-routing business rules need to consider the optimal number of simultaneous contacts per agent, balancing agent efficiency against service quality and effectiveness.

- "Blended agents" takes on a whole new meaning in a multichannel environment. Keys to success include appropriate notifications/transitions as agents move from one medium to another, and fair and reasonable performance metrics to accommodate the variability in contact requirements.

- Response times differ by choice of media; e.g., immediate response for real-time contact, reasonable delay for the rest. Given appropriate input on who is contacting and why, some interactions may be addressed by automated agents.

- Transitions from one channel (or department) to another need to be as seamless as possible even when such "channel crossings" are separated in time.

- Quality assurance criteria should adhere to common overarching standards while addressing the unique character of the medium. For example, written communication may have spelling, grammar and/or word usage criteria. Voice communication generally places greater weight on "soft skills" than its text-based counterparts.

- Different media put different expectations on workforce planning—forecasting, scheduling and tracking. Planning for random arrivals and real-time response for voice calls differs from media that give you hours to respond or enable the CSR to handle multiple contacts simultaneously.

- Manager, supervisor and agent dashboards need to reflect the full extent of the center, team and individual responsibilities at a glance. Performance expectations at all levels of the organization need to be reasonable, straightforward, and easily measured and monitored to allow for real-time action.

Strive for Excellence in Self-Service

Contact center managers have long had visions of driving routine transactions to self-service channels. One of the key benefits of a comprehensive analytics solution is the ability to determine when and where self-service applications offer opportunities to offload contacts from higher cost modes of contact. Opportunities include:

- Appropriate use of automated speech recognition (ASR) versus touch-tone user interface

- Tuning the ASR to understand speech patterns

- Improving navigation to help users locate the desired transaction type

- Providing clear, step-by-step instructions

to complete transactions using readily available information

- Providing confirmation (assurance) that a transaction was completed successfully

An analytics tool will pinpoint problems and identify opportunities to improve penetration. For example, if customers follow a consistent usage pattern (e.g., balance inquiries at month end) or access their service options in response to specific events (e.g., travel plans, order placement/shipment), then a proactive outbound contact may prove more convenient for them and (perhaps) less costly for you. At a minimum, it creates an opportunity to "wow" instead of merely satisfy.

You should also assess whether you are spending the right amount of time, resources and dollars on the right tools to meet your current/future customers and transaction types. Not everyone can or will use the web. Not every application is a good fit for IVR. Even with the right investments, a consistent user experience across applications, and robust (preferably error-free) technology, there will still be occasions when people will transition out of the application. Your customer service center needs to be ready to answer the call and take up where the customer left off.

Plan Ahead… Together

While responsibility for managing customer-facing channels may reside in different depart-ments, customers should experience the organization as an integrated whole. Technology can be an enabler for delivering consistent treatment across all points of contact. But it requires forethought and planning to ensure that the critical technologies for service delivery are accessible across the organization and work together seamlessly.

Before you get too far down the road of building out your technology infrastructure and applications, get a crossfunctional team together to set multichannel goals and identify the tools necessary to meet them. Establish a process for evaluating technology investments against a strategic view of customer contact, not the individual department or channel owner's needs. In the end, it will serve all of their interests.

Editor's note: To read more about creating a crossfunctional, cross-channel strategy, see "Pursue Strategy and Governance to Ensure Multichannel Technology Optimization," *Pipeline*, March 2011.

Lori Bocklund is Founder and President of *Strategic Contact*.
✉ lori@strategiccontact.com
☎ (503) 579-8560

Maren Symonds is a Consultant and Marketing Director for *Strategic Contact*.
✉ maren@strategiccontact.com
☎ (503) 524-4525

Online Resource

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