Multichannel Technology Comes into Its Own

Treat your customers and contact channels with respect. It's time to eliminate the media silos that suboptimize operations and the customer experience.

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Multimedia is not new to the contact center. Most companies have had "contact centers" rather than "call centers" for years. Multichannel technology is not new either; vendors have been offering integrated multimedia routing and reporting since the "dot-com" boom days. So why have so few centers implemented it? Should centers finally put these requirements into practice by leveraging what's possible?

Based on the activity we're seeing, multichannel communications is not an option; it's a necessity. Phone calls may still rule, but the alternatives to real-time voice are too numerous and significant to ignore or treat as second class. A quick inventory around your operation would probably reveal several other media from traditional mail and fax to web chat and now support for mobile and social media channels. Customers expect choices and companies want (and need) to deliver. The big leap involves looking at the customer experience end-to-end, within and across channels, and treating each channel with respect!

Understand the Silos

Start by looking at why centers are multichannel operationally but not technologically—and why that just won't cut it anymore. Most centers handle each medium on its own, informally. Few companies integrate channels or use sophisticated tools in contact routing and handling. For example, most centers have little to no reporting on media beyond phone calls, and what data they have isn't used for staffing and planning. We see an abundance of email handling simply using Outlook or Lotus Notes—because it was available and easy, offering the path of least resistance when offering customers email. But without tracking, reporting and assurance that customer needs are met, much less in a timely fashion, it falls short of any measure of optimizing the customer experience. Moreover, where a response "library" exists at all, it is generally in Word, leaving it hard to maintain and ensure accuracy and consistency.

While these approaches might be "good enough" with low volume, the reality is good people make up for poor technology and that is inherently not scalable or sustainable for large-volume, diverse contacts. And without a concerted focus on processes, service suffers even with these good people eagerly handling each contact.

Web chat, if done, is often via a third-party hosted solution. That makes sense if you want to try it, operate as a separate channel, outsource it, and/or avoid technology investment and integration. But it is often pursued with a dedicated group that isn't necessarily staffing to service levels and applying other performance management processes. The silo approach to chat may "work," but it still needs rigor and integration with the other channels.

Similarly, fax and/or mail are often handled via a separate group, manually or as "filler" work by phone agents. Where volume justified, some have fax systems that deliver to a "queue" but often lead to manual routing, with little reporting and planning.

Eliminate the Silos

While many contact centers don't view their silos as broken or in need of fixing, the reality is that approach suboptimizes operations and the customer experience. In today's incredibly competitive world, where service is often the differentiator as nontraditional channels gain steam, few can afford to compromise. And if you apply "typical" operational best practices principles to the other media, our bet is you will quickly see they fall short. Telltale signs include: complicated and inconsistent skills and routing management, as well as contact-handling processes; a lack of fundamental processes, such as forecasting volume/workload, planning staffing tied to the workload, skill development targeted at the media, rigorous quality management (comparable to that applied to calls), and use and maintenance of knowledge tools and libraries; and the lack of performance commitments that ensure a consistent and "good" customer experience.

Multichannel Routing

Figure 1, *right*
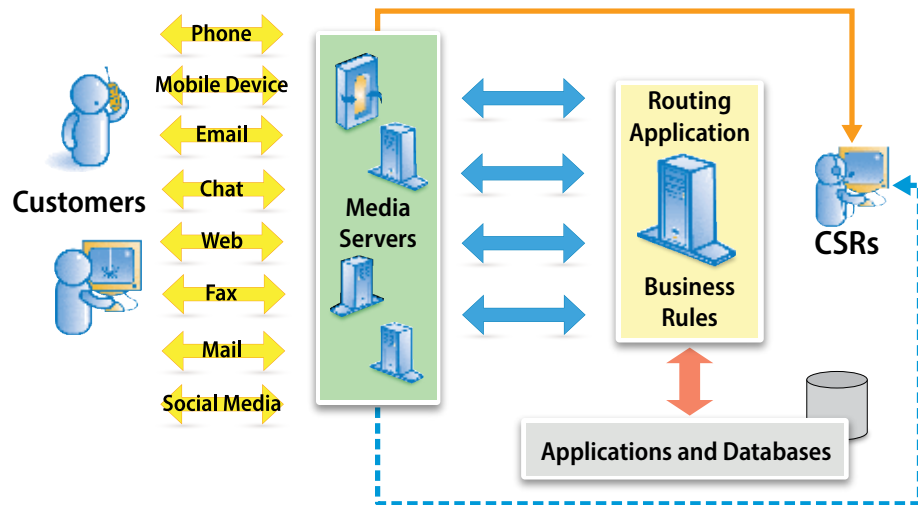
You get the picture.

Beyond that quick self-assessment, many things can trigger change:

- Marketing begins to push alternate channels, driving higher volumes. Or, the volume mix changes driven simply by customer preferences. You could be experiencing a decreased emphasis on traditional media (fax, mail, perhaps even voice or email) and growth in web-based media, such as chat and other emerging media (mobile, social).

- The web becomes a more common self-service tool, triggering increases in "contact us" emails and web chat volume, and changing customer service expectations. (And the corollary, IVR becomes a less popular self-service tool, triggering fewer calls and leaving a higher percentage of calls going to agents—also accompanied by strong customer service expectations.)

- Workforce planners recognize under- or over-staffing in specific channel silos (although they may not have all the data they need to support their belief!), and struggle to map people to workload across the silos. The center finds it hard to staff right for each media as separate, relatively low and changing volume.

- The lack of data shows it's time to formalize other channels for performance tracking and optimization. You realize that these channels need the same types of data, reports and analytics. They need quality monitoring and voice of the customer. Workforce planning has to consider not just phone calls and Erlang models, but the unique characteristics of the arrivals and handling of each media.

- An "end-of-life" voice platform needs replacement, and the state of the market shows that the offerings are multichannel platforms that inherently provide routing and reporting for a variety of media.

- Customer satisfaction decreases as web, IVR, mobile and agent information is inconsistent or context from a self-service effort doesn't follow the customer when agent assistance is needed.

Any of these situations cry out for technology change. The silos must come down, at least from the perspective of the multimedia routing and reporting, and the delivery and management of all contacts.

Know What's Possible

To pursue changes, look at the technology today to catalyze your thinking on what is possible and what you should consider. Understand the functionality and its benefits. Regardless of the degree to which you "blend" agents (for example, not at all; some blending for common media, such as email and chat as both text-based; or "universal" queue across media), a common routing and reporting engine has advantages. You'll benefit from a common place for administration of agent profiles, skills and routing rules. As you apply those routing rules, the ability to trigger logic based on what is happening with all media queues and agent skills and availability will optimize resource utilization as well as responsiveness to customer needs. You can balance commitments to real-time media, such as voice calls and chat, with deferrable media, such as email or faxes. (See Figure 1 on page 3.)

You gain a more credible story as a "contact center" leader or support resource as your integrated reporting lets you present performance across media. Volumes, handle times and workloads become well understood not just for voice calls, but for all media. Accurate insights into agent utilization and time in workstates lets you really manage your most valuable (and expensive) asset for serving customers. You can commit to, manage to and understand performance indicators.

And while routing and reporting are the heart and soul of contact management and handling, the data generated feeds into and integrates with performance tools. Picture your voice world today, perhaps with workforce management getting ACD data and quality monitoring systems capturing and replaying voice conversations. Ideally, other tools such as speech analytics and voice of the customer capture other insights into what your customer said and experienced. Now apply that vision to other media and imagine a similar level of integration and insight for your currently neglected media. Throw into the mix common knowledge management tools used for consistent answers to customers, regardless of channel, and contact tracking that captures interactions across all media and passes it to agents when customers seek assistance. Now that's a "*contact* center."

Choose the Right Path

With that vision in mind, it's time to think about how to get there. Consider all possibilities for sourcing: premise or hosted ("cloud") solutions, suite or best-of-breed. Focus on the solutions' ability to integrate with your current environment as a primary criterion. If you foresee your existing voice platform being around for a long time, identify vendors with solutions that leverage it as a "voice server." Consider the integrated multichannel routing and reporting platform that your current vendor offers. You may need to upgrade and make changes to how you route, depending on your starting point, but it may get you further, faster.

"CTI-like" solutions for external multichannel routing and reporting engines are another possibility, whether from your vendor or a third party. Hosted applications that use your platform as the voice path could provide that cross-media intelligence and integration point, managing a variety of media. Using third parties for specific media may not be ideal as it

creates a silo of sorts for that media. But if that's your best path due to limitations in budget, time or resources, or if it's a current solution with which you've experienced success, take it to the next level with integration through technology or processes or both.

If you are replacing a platform (e.g., your "phone system" or "ACD"), it is essential that you not only include the ability to do multichannel in your evaluation, but that you make plans to actually implement it. Use technology replacement (or major upgrades) as an incentive to change processes, not just technology. Consider how big a role multichannel routing and reporting will play in your decision and evaluate options accordingly. Keep in mind that vendors vary in the approach and level of integration across media, and the corresponding architectures require different levels of IT support.

Finally, as you define your path, consider the impact your new multichannel environment will have on your adjunct systems (performance tools, CTI, KM, CRM, etc.) as you expand media under consideration. Start by looking at your existing systems and vendor partners and how they can support other media. Where appropriate, consider third parties but recognize the value of integration across channels.

Customer service interactions have many characteristics that you need to consider in your strategy and there are an abundance of vendor options. The sidebars on pages 6 and 7 provide some food for thought in your media and technology planning.

Ready or Not

As always, this story is not just about technology—it's about people and processes, as well. You can't just replace: You need to retool. The biggest risk we see is that technology plans are pursued with the intent of doing more media or doing your current media effectively and efficiently… in the future, maybe, eventually. That kind of thinking got us to where we are. The technology isn't new; the compulsion to do something with it is.

The reality for most centers is that NOW is the time to manage multichannel customer contacts effectively. You can optimize your operations: save money through more efficient resource use, make more time available for relationship building and selling, and have greater insights into what's working (or not) in your customer interactions (and what outcomes result). In the process, you will optimize your customers' experience regardless of which media they choose. They're ready. Are you? ⓟ

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Where to Start?
Call Your Favorite Vendors!

A wide range of vendors are eager to talk to you about how their solutions can support multimedia contact centers. Here are some considerations as you begin to plan.

- **Consider the main players for contact center technology platforms:**
  - Every contact center technology player of note has a multichannel routing and reporting engine—Avaya, Cisco, Interactive Intelligence, Aspect, Siemens, Genesys, etc.
  - Hosted/cloud solution vendors offer multichannel routing and reporting engines—Echopass, Five9, InContact, Contactual and many of the "CRM" solution vendors (Oracle, RightNow, SAP, etc.)

- **Some solution providers offer a combination of people, process and technology:**
  - Outsourcers that offer alternative media handling—West, Convergys, TeleTech, etc.
  - Many of the major service providers—Verizon, IBM, Accenture, etc.

- **Performance tool vendors integrate with multichannel platforms and provide capabilities across media for QM, WFM, VoC, etc.:**
  - Top tier suites such as Aspect, Nice, Verint
  - Other players in the performance tool area—Calabrio, Envision, VPI, etc.
  - Performance suites from the core platform, hosted or outsourced vendors

- **And don't forget providers of KM and CRM—Investigate how their solution fits with a multimedia contact environment.**

In any case, recognize that vendor maturity with respect to multimedia varies greatly, and is exhibited through integration, complete solutions and proven implementations. Investigate their media list and architecture. Ask: Where do you administer each media? Where are the databases and reports accessed for each media? How easily will they integrate with your voice platform? Answers to these questions will help you to understand if you're dealing with a single engine or multiple, and if their media list matches yours.

Different Media, Different Characteristics

Take a comprehensive inventory and define media requirements for your customer interactions:

- **Voice calls**
- **Walk-in (store, branch)**
- **Email**
- **Video**
- **Web chat**
- **Kiosk**
- **Web collaboration**
- **Web**
- **SMS/MMS/Text Messaging**
- **IVR**
- **Fax, Mail**
- **Mobile Apps**
- **Social Media (Facebook, Twitter, RSS, etc.)**

Then consider the characteristics of these media for your business:

- **How fast does it need to be handled (real-time vs. deferrable)?**
- **Does an agent need to be involved (self service vs. assisted service)?**
- **Will there be single or multiple sessions (for customer, agent and/ or system)?**
- **Can it be inbound, outbound or both? Proactive and/or reactive?**
- **Will the customer be remote or face-to-face with the CSR or system?**
- **Is the interaction one-to-one, one-to-many or many-to-many?**
- **And who might be involved in the interaction (Company or Community [Social] or both)?**

And don't forget, any of these media could cross channels, becoming "multi-modal," serially or in parallel, as the customer needs change, resolution occurs (or doesn't), or they want to engage others.

About Contact Center Pipeline

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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