

## Best Practices Series



# Smart Customer Service That Wows Customers

What a fantastic collection of submissions we have in this month's installment of our Best Practices series. In the following pages, you will find a primer on the five essential parts of smart customer service and recommendations ranging from differentiating your brand with personalization to using knowledge management to drive customer engagement.

This Best Practices guide is full of information and research findings that will help you make a business case for your customer experience transformation.

Interested in how you can leverage artificial intelligence (AI) and machine learning now? Find out how robotic process automation and AI can be immediately incorporated into your service offerings to help your company stand out and improve shareholder value.

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# Differentiating Your Brand with Personalized Customer Interactions

*By Ricardo Layun, Vice President,  
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Delivering a personalized customer experience is crucial in today's retail environment that is all about the hyper-connected consumer. Studies have shown that 59 percent of shoppers will not return to a store after they've had a bad experience. Meanwhile customers that have had a great experience will spend 2.5 time more than those that did not.<sup>1</sup>

Whether interactions are via phone, chat, or email, your customers expect a frictionless, seamless, and authentic experience. In fact, 49 percent of customers purchased items they didn't intend to buy due to a personalized recommendation.<sup>2</sup> And 71 percent of consumers express some level of frustration when their experience is impersonal<sup>3</sup>.

While more than 70 percent of retailers say personalization is their top priority, there is a disconnect between recognizing the need for personalization and executing those experiences well. A big factor is the proliferation of technology and ability to understand a customer's history and preferences across digital and physical channels. Understanding the customer journey across the myriad of channels in which today's consumers research products, make purchases, and interact is complex. While the data is there and available, it often sits in silos versus providing any customer service agent or store associate, from any location, the ability to quickly act on the data to deliver a seamless and personalized customer experience.

For example, making sure that a live agent immediately knows that the customer



on the phone who is calling to follow-up on an order recently placed has been a loyal customer for 10 years. The agents can then treat that customer with special attention and even make offers to reward that loyalty like free shipping on the order. Or something even more basic like just making sure that the agent has the data on hand to quickly determine why the customer might be calling to provide faster resolution and a seamless interaction. But this is rarely the case, instead, even some basic customer service inquiries go awry creating fiction and frustration—like when customers have to explain to a live agent what they just tried to figure out through IVR or via chat earlier.

## DIFFERENTIATING WITH CUSTOMER CARE

The fact is that wow is only wow for so long before customers expect it. There are a few fundamental things that retailers and brands should do to stay competitive and exceed today's customer expectations.

### 1) Understand the Customer Journey

Customer journey mapping allows businesses to understand their customers' needs, preferences, and behaviors. That data can then be used to maximize every interaction with them to drive loyalty and reduce friction. This includes everything from understanding a customer's ordering and buying habits and preferences across physical and digital channels to make ordering easy; to leveraging machine learning and artificial intelligence (AI) to intelligently cross-sell to customers based on their known product interests.

But what's also important is giving customers choices to be as transparent as they like about how and how much they share their buying history, preferences, and interactions. For example, provide them with choices to opt-in or opt-out with any experience and to determine the extent that they want to share their information to drive personalization.

<sup>1</sup> "2017 POS/Customer Engagement Study," Boston Retail Partners.

<sup>2</sup> Hyken, Shep. "Personalized Customer Experience Increases Revenue and Loyalty," *Forbes*. Oct. 29, 2017.

<sup>3</sup> "The 2017 State of Personalization Report," Segment. Oct. 26, 2017.



It's important for businesses to define how they want to influence the customer journey. What's the desired outcome? Start with strategy and build from there.

## 2) Leverage Self-Service

A consumer experience survey by Aspect found that 73 percent of customers surveyed want the ability to solve service issues on their own, while 76 percent said they will view the customer service they receive as a true test of how much a company values them as a customer.<sup>4</sup> A CFI study also revealed 83 percent of shoppers indicate they prefer using self-service tools to resolve issues on their own.<sup>5</sup>

While there are many self-service trends on the horizon, providing customers with AI options and Visual Interactive Voice Response (IVR) technology are two popular and effective solutions available.

Chatbots are among the most recognizable AI applications for customer care. These virtual agents can answer basic questions for consumers and guide them on their journey to get answers online and are ideal for helping consumers access information and complete basic tasks that save retailers money and improve the customer experience. After all, customers find the need to interact with retailers to fulfill many different requests that don't necessarily require a live agent, such as order status and billing questions to troubleshooting and product inquiries. Virtual agents powered by AI provide a fast and cost-effective way to access a variety of information and data that can solve customer inquiries without having to go through traditional IVRs or live agents.

Bottom-line: Make it easy to get service and leverage the power of AI and machine learning to provide personalized customer experiences via loyalty programs, eCommerce sales, as well as in-store sales.

## 3) Invest in Mobile

An estimated \$669 billion in global retail commerce revenue will come from mobile this year.<sup>6</sup> Recognizing the huge revenue potential that mobile presents, retailers are doubling down on their mobile technology investments. In fact, Boston Retail Partners' 2017 POS/Customer Engagement Study found that mobile ranks among retailers' top engagement priorities: with 57 percent focused on mobile alignment and 46 percent on empowering associates with mobile tools.

With mobile devices in hand, customers can easily search and compare products and prices online, as well as read customer reviews and get instant feedback from their circle of friends via social media.

This transparency makes the retailer's job that much more difficult as they can no longer just differentiate on product or price. The customer experience is what drives customer loyalty.

In many cases, the physical store is falling short of meeting expectations in personalized service. The digital retail environment has reshaped what customers expect. They want personalized offers and recommendations when shopping online or via mobile that they don't usually receive when they shop in a store.

This is an area of opportunity for retailers as digital and physical retail continues to converge, and the key to personalizing the experience is the ability to identify a customer as soon as they enter the store.

Creating valuable and memorable customer experiences requires a commitment to process improvement and innovation, and there's no magic wand. Set the course, connect dots, get

the data, and make sure the technology is in place to continuously measure improvement and drive results. Businesses that are laser-focused on their customer journey strategy and leveraging the power of self-service tools and the mobile channel will be the ones that can successfully exceed customer expectations in today's integrated commerce environment. ■



**Ricardo Layun** leads Radial's customer service operations and contact centers, joining the company in June 2010. Previously, he spent 10 years with TRX/TATA Business Support Services as the Vice President,

Operations, responsible for the operational performance and strategic direction of the US contact centers as well as a contact center located in Berlin, Germany and Leicester, UK.

Between 1998-2000, he worked with Provident Financial located in Fairfield, Calif., leading a team of more than 1,000 credit services professionals. Layun began his contact center journey over 30-years ago at American Express in Plantation, Fla.

He holds a B.S. degree in Business Administrative Studies from Nova Southeastern University and has completed MBA coursework in International Management at Lynn University.

## ABOUT RADIAL

**Radial**, the leader in omnichannel technology and operations, provides award-winning Customer Service centers powered by brand-focused customer service agents and industry leading technology solutions. Backed by a 30-year track-record of success, we help retailers and brands around the world deliver the customer experience consumers expect to succeed in the age of the consumer. Contact us at **877-255-2857** or visit us at **www.radial.com**.

<sup>4</sup> "The Aspect Consumer Index," Aspect. May 2016.

<sup>5</sup> "2016 Radial/CFI Study," CFI Group. May 2016.

<sup>6</sup> Crawl, Jonathan. "How to Provide a Personalized Mobile Retail Experience: 3 Critical Steps," *Mobile Business Insights*. Mar. 13, 2018.





# Successfully navigate your customer experience transformation

In this digital age, customer experience is your key differentiator. Customers want more than just a transactional relationship. They expect positive, personalized engagement that makes them feel special and compels them to continue the relationship. These experiences create loyal customers and a strong brand reputation. Choosing the right technology is essential—but it's only one step in the customer experience transformation journey.

Customer experience success entails the right mix of skills, processes and technologies that work together to achieve key metrics and meet specific business needs. Determining this optimal combination requires insightful planning as you design, deploy, operate and evolve your customer experience.

Every journey to customer experience mastery is different; there's no one-size fits-all plan. Select a strategic technology partner who will navigate your success using proven best practices and guidance to drives value from your investments. With this collaborative approach, a trusted advisor guides your journey before, during and after deployment.

## SET YOUR STRATEGY

There's a lot to consider when you begin a customer experience transformation. The first step is to learn what's possible from new technology and what that means for your customer experience. Identify areas for improvement in terms of revenue, efficiency and engagement.

Next, evaluate your existing customer journey and processes to develop a clear plan to achieve your vision. You must understand your customers' needs to ensure your technology deployment supports them. Complete a comprehensive analysis of *who*, *what*, *where* and *when*.



- *Who* will you serve?
- *What* do you want to accomplish?
- *Where* do you want to take action?
- *When* will you implement these changes?

You also must identify where to implement new capabilities or process changes to meet goals and objectives. Supporting omnichannel engagement requires mobile, social and traditional channels; integration with back-office solutions; improved workforce management; and a platform that gives you a 360-degree view of every customer—for every interaction. Through proven best practices, you'll uncover missed opportunities that could generate value and enable you to create small and realistic business steps to rapidly increase your business outcomes.

Shape your vision by building a roadmap with the best solutions to

meet your business requirements and customer experience goals. Documented use cases provide a concrete analysis of improvements and expected benefits. Understanding the financial effects of improving your customer experience is critical to creating a solid business case and validating your request for investment.

ROI rationalizes your investment in a new technology, providing directional data and determining the efficiency of existing investments. Before finalizing any purchasing decision, consider key costs as well as the value they create:

- **Subscription/license costs:** Understand the subscription or license cost for the software, how many seats you will require each year and if you'll need additional, seasonal seats.
- **IT labor and support costs:** Determine if your solution requires IT staffing to ensure uptime and maintenance of hosted services—



and if that team will configure complicated IVR menus and workflows. Calculate the time and cost needed for software user support, onboarding and permissions. Finally, establish which team will build customer reporting or perform custom integrations and development.

- **Implementation costs:** Create an implementation timeline and consider if you need to add hardware to your existing infrastructure. Be sure to include any professional services needed during deployment, as these will add expenses.

#### GET READY

As your framework takes shape, evaluate job roles and responsibilities, internal processes, and skills development. Preparing for your transformation results in a more seamless transition and increased value realization.

IT and business leaders must work together to ensure the plan meets everyone's expectations. Start with new technology and plan to change related business processes. Track progress as you go and set clear metrics for your success. Don't forget to measure your performance against goals to ensure you have met your ROI.

Teams also need the skills and procedures to drive success. One of the most underestimated aspects of a customer experience transformation is the cultural change required to achieve and sustain it. Integrating systems and people into a holistic service and solution requires communication and resource orchestration across organizations. Define clear roles, streamline milestones and phases, and prepare to go live. You also must train frontline employees to effectively use these new tools and coach them on how to manage interactions. Leverage interaction analytics to pinpoint opportunities for improvement.

#### GO LIVE

When your platform goes live, the work is just beginning. This is when

you need to monitor your operation to determine if you're on track with the expectation you set during the strategy phase. Expect to see fluctuations that test your plans and then modify, as needed. You also must keep your technology aligned with evolving customer expectations and business needs.

Because deployment is just the start of your customer experience journey, your vendor must be clearly committed to your long-term success. With a true partner, the relationship will deepen as you address evolving goals and new challenges.

#### CHOOSE A VENDOR WHO FOCUSES ON YOUR SUCCESS

Because today's customer experience technologies are so complex, you need more than just a vendor selling a solution to succeed. Choosing a strategic partner that guides your journey as you design, deploy and deliver your customer experience gives you a clear advantage. The Genesys® PureSuccess framework provides both a comprehensive delivery platform and a trusted advisor to guide you through every step of your transformation.

The PureSuccess customer experience framework gives you everything you need during your customer experience journey. Three comprehensive PureSuccess offers let you choose your level of engagement; the flexible subscription plan lets you meet new challenges or objectives, as needed, or decrease use when you require less assistance.

- **PureSuccess Drive**—Receive guidance, hands-on leadership and reviews during each phase of your journey.
- **PureSuccess Guide**—Leverage instructor-led training and live consultations to adopt the skills, processes and technology you need to deliver the best customer experiences.

- **PureSuccess Equip**—Operate your solution independently with a full journey toolkit to create an exceptional customer experience. Access the extensive Genesys eLearning library as well as best practices and tools for testing, monitoring and troubleshooting.

Each PureSuccess offer provides educational materials and training to improve your customer experience capabilities year after year. You also gain access to a range of supplementary services from the PureSuccess catalog—at no additional cost.

And leveraging the PureSuccess framework gives you access to a Genesys Advisor to guide you throughout each phase of planning, deployment, utilization and evolution. Leveraging years of commercial expertise and customer success, your advisor is a single point of contact for orchestrating adoption and realizing the full value of your Genesys Customer Experience Platform. No matter which level of engagement you choose, your advisor will work toward your best interests—every step of the way. ■

**Learn more** about how the PureSuccess framework positions you to use Genesys technology to its full potential so you can make customer experience your competitive advantage.

[www.genesys.com/resources/Genesys-PureSuccess-BR-EN.pdf](http://www.genesys.com/resources/Genesys-PureSuccess-BR-EN.pdf)



PureSuccess



# Everybody Loves a Bot: How to Wow Your Customers with Robotic Process Automation

In a world of instant gratification, it is difficult to impress the average consumer. They are demanding faster, more convenient, personalized service and support—and they want it delivered via the channel and device of their choice. You need to reduce or eliminate internal human effort wherever it does not add value or is not essential, but how can you do that using outdated legacy infrastructures and systems?

Robotic process automation (RPA) is the answer. This relatively inexpensive and fast technology can deliver transformative customer experiences at a time when your business needs them most.







This paper will help de-mystify RPA and help you get on the path to implementing RPA solutions in your contact center.

## WHAT IS RPA?

RPA is the use of software “robots” or “bots” to automate tasks as if a real person were doing them. These software robots can be customer facing and can run non-invasively on an employee’s desktop, interacting with one or more existing applications and systems in the same way as a human user.

You can use RPA to augment, as well as fully automate, tasks to improve speed, accuracy, and efficiency. When thoughtfully applied, RPA has proven to have a significant impact on handle time, work accuracy, security, compliance, customer satisfaction (CSAT) performance, effort, cost savings, and sales revenue.

## AUTOMATION BENEFITS

 <b>BETTER CUSTOMER EXPERIENCE</b> <ul style="list-style-type: none"> <li>Faster, more accurate, more consistent, lower effort interactions</li> </ul>	 <b>ACCURACY, COMPLIANCE, SECURITY</b> <ul style="list-style-type: none"> <li>100% accuracy, no errors, no rework</li> <li>Complete audit trail of transactions, tasks</li> </ul>
 <b>PROFITABILITY AND COST REDUCTION</b> <ul style="list-style-type: none"> <li>Cost of a bot typically a fraction of a human</li> <li>Quick to implement and short time to value realization</li> </ul>	 <b>LOWER RISK, NON-INVASIVE</b> <ul style="list-style-type: none"> <li>Bots typically overlay on existing systems</li> <li>Avoids complexity and risk associated with updating legacy systems</li> </ul>
 <b>PRODUCTIVITY AND EFFICIENCY</b> <ul style="list-style-type: none"> <li>Bots can typically complete tasks 4-5 times faster than a human worker</li> <li>Work on demand 24/7/365</li> <li>Free people to focus on higher value tasks (e.g., service to sales)</li> </ul>	 <b>OPTIMIZE OPERATIONS</b> <ul style="list-style-type: none"> <li>Improves response times, accuracy</li> <li>Scale and update to meet demand</li> </ul>

## HOW CAN WE USE RPA?

Here are just a few examples of areas in which companies are applying RPA to drive service innovation and business outcomes in their contact centers:

- Regulatory Compliance
  - Auto-population of fields across systems to ensure entry accuracy
  - Regulatory compliance, disclosure automation, metrics compliance

- Security and Fraud Detection
  - Single sign-on, identity and password management
  - Automated call fraud detection, secure payments, data masking
- Desktop Automation
  - “Click of a button” task automation, cut/paste, data entry
  - Eligibility checks, comparisons, data collection and analysis
- Personalized Care and Selling
  - Dynamic offer generation based on customer profile, purchase history, and product availability
- Intelligent Case Tracking
  - Case prioritization and service level monitoring
  - End-to-end case tracking and management

## HOW CAN RPA AND BOTS HELP CONTACT CENTER AGENTS?

One of the most common starting points for RPA in the contact center is the agent desktop. The typical agent desktop environment is a myriad of systems and applications that are often disjointed and challenging for agents to navigate. Agents frequently have to work with 10 or 20 different systems, knowledge bases, and applications as they handle different callers and chats over the course of a single day.

Agents need to read, cut and paste, search, compare, and validate information across systems, all while under constant pressure from customers who demand personalized attention and accurate answers in real time. Tedious, time-consuming, repetitive tasks distract the agent from focusing on the customer, and complex procedures are prone to error and inconsistency, making it difficult for agents and care operations to perform at their best.

These challenges make the agent desktop an environment ripe for application of RPA. With RPA, all or a portion of these daily tasks can be automated, freeing agents to focus more on customer engagement, important decision-making, and desired business outcomes.

With RPA, agents can deliver a more focused, consultative engagement, resulting in a higher quality exchange with the customer. Other benefits include:

- Improved service consistency and script compliance
- Reduced customer callbacks
- Lower average handle time (AHT)
- Higher customer satisfaction and improved Net Promoter Score® (NPS®)
- Better utilization of knowledge base and agent tools
- Reduced agent training and onboarding time



RPA can also benefit other areas, from reducing or eliminating security, fraud, or compliance risks to improving case prioritization and management and back office work.

### WHICH TASKS SHOULD WE AUTOMATE?

When looking at potential areas for automation, it's crucial to be discriminating. You need an understanding of the kinds of tasks and workflows that are *not* suited to automation, as well as those that are. Good candidates for chatbots and RPA are repeatable with simple steps, well mapped, seldom changing, and frequently performed. Poor candidates for RPA are highly complex, infrequently performed, often changing, and involve frequent exceptions that require human decision-making.

Identifying the right types of processes will help you avoid attempting to automate the wrong things. Below are a few of the characteristics you can use to determine what types of tasks you can automate with chatbots and RPA:

- **Data-intensive:** users need to manipulate or verify data across multiple fields or systems
- **Highly repetitive, high volume:** tasks completed thousands of times a day or week
- **Rules-driven:** "if X then Y" types of decision-making
- **Well-structured:** clear task starting and end points, inputs and outputs

Other criteria that can be signals for RPA candidates include processes or tasks that are:

- **Prone to human error:** complex, lengthy procedures with intense analysis, calculations, or policy interpretation
- **Highly regulated:** high risk of regulatory penalties if work out of compliance
- **Highly sensitive:** involve unnecessary exposure of customer or business data, potential fraud
- **Training intensive:** significant training time needed to teach users to be accurate and proficient

The most successful implementations are those where all or most of these characteristics are met, resulting in a strong business case and ROI.

### KEY TAKEAWAYS

- **Select the right process/task.** Trying to accomplish too much at once or selecting an end-to-end process that is too complex often increases the potential risk of failure.
- **Don't believe all the hype.** Not all RPA implementations are as simple as some vendors may have you believe, and not every project will be "turnkey" capable of transforming your operation in a week. While some RPA solutions take as little as 2-4 weeks from development to implementation, others require business

#### CASE STUDY:

### Automating Tasks with the Click of a Button

A global communications company was struggling to consistently address customer billing inquiries in a timely manner. Their customers were dissatisfied with the time it took to get an answer from agents on why their monthly bill had changed.

Convergys conducted a thorough time motion analysis of the customer "billing inquiry" journey and identified a set of repetitive process steps.

A billing comparison "bot" was built to automate these steps at the click of a button, reducing processing time by almost 60 percent, while generating a more consistent response to the caller's inquiry.

process and organizational changes, as well as technical factors such as deeper program integration, thus increasing time to benefit.

- **Don't implement RPA in a vacuum.** As with any technology-driven change, leaders need to think holistically about how RPA affects their services, processes, procedures, customers, and employees. Internally deploying RPA at scale can create a major culture, talent, and work shift, which may challenge established norms and raise concerns with your workforce. Timely, clear communication and coordination with all stakeholders is key to adoption and long-term success.
- **Do it yourself or get help?** No matter where you decide to start, some ongoing governance, development and maintenance, and business continuity planning will be necessary. You will need to decide if you want to handle these tasks yourselves, such as training current employees, hiring new technical talent, and maintaining and updating the technology, or outsource all or parts of your model.
- **Get started now!** Generally, early adopters of new technologies generate more shareholder value and market differentiation than those that wait. We believe organizations should start small, evaluate lessons learned, and scale best practices across their organizations along the way. ■

#### Why Convergys?

For over 30 years, Convergys has provided industry-leading technologies and services that balance customer satisfaction with cost reduction. We currently manage RPA for more than 30,000 users and 30 clients across a wide variety of front and back-office processes. Our typical RPA projects are self-funding, completed in weeks, and supported by our proven, industry-leading global operating model.





# The Five Parts of Smart Customer Service

While there is no standard definition for “smart” customer service, most people would agree that it is service that is Scalable, Multichannel, Agile, Relevant, and Timely. Here is more about these five parts and how they lead to smart customer service.

## 1. SCALABLE

Scalable customer service not only refers to the ability to support a large number of users, but also to the ability to scale service quality. One could argue that customer service is even more mission-critical than employee-facing applications since moments of truth in customer service expose your brand more than any other customer interaction. Make sure your customer service system is proven in large-scale deployments. Moreover, a knowledge management (KM) system is essential to scaling quality of service across the agent pool and customer self-service systems. Without KM, your customer service systems will be “flying blind,” leading to agent frustration and customer defection.

## 2. MULTICHANNEL

Today’s customer is not “going multichannel”—they are “born multichannel”! These customers often undertake multichannel journeys to make a purchase or complete a service interaction. Remember “a journey saved is a customer earned or kept.” For instance, according to a recent Gallup poll, 40% of Americans have showroomed (researched in brick-and-mortar stores and bought online) at least once. A recent Harris poll revealed 69% of Americans have webroomed, where they browse Amazon and then pick up goods at physical stores. There’s no doubt that businesses that are able to design and deliver connected and consistent multichannel journeys will be better positioned to grab an “unfair” share of the market.

Customer Engagement Hubs (CEH) are fast emerging as the best approach

to deliver such journeys. A concept advocated by Gartner and increasingly embraced by market leaders, a CEH consolidates interactions, knowledge, processes, analytics, and administration into a common platform. The benefits? Connected multichannel experiences, improved contact center productivity and sales conversion, and reduced Total Cost of Ownership.

## 3. AGILE

Consumers are adopting and discarding communication channels and devices at breakneck speed. Look no further than MySpace and Blackberry. How can you keep up with today’s fickle consumers? Again, a CEH is the answer—the hub allows you to plug in new interaction methods and devices without creating new silos, frustrating customer experiences, and perpetual integration projects.

## 4. RELEVANT

Irrelevant service is as bad as no service. Providing smart guidance to customers across their multichannel journeys, reactive and proactive, can make or break customer journeys. A KM system that can deliver fast and accurate answers and help execute processes and next best steps that are compliant with best practices and regulatory compliance is key to success here. Look for a unified KM system that combines the power of multiple search methods, case-based reasoning that mimics human intelligence, and easy multichannel, multi-device access to take journey guidance and relevance to the next level.

## 5. TIMELY

“Better late than never” is not acceptable for customer service. Make sure you deliver on your promise by setting the right policy and leveraging service level management processes, including workflows that trigger alarms to proactively manage compliance. Note that customer expectations for speed of response vary across channels, industries, and the nature of the business.

While a multi-hour response time might be OK for email customer service, it might be tardy enough to take down a brand in a Twitter storm of complaints about a business’ non-response in social.

## GETTING TO “SMART”

Like anything else, getting to “smart customer service” is a journey. Start by understanding the channel and device preferences of your customers, implementing the most popular touchpoints first. As the next step, prioritize journeys, including the touchpoints and the nature of the “touches” that are the most common and deliver the highest value for the business. Make those journeys memorable and friction-free. Take your service vision to reality with a knowledge-guided CEH approach to get “smart” for today and “smarter” for tomorrow. Going with a proven partner like eGain with best-of-breed customer engagement solutions, a unified multichannel platform, pioneering cloud capabilities, and 20 years of domain expertise has helped market leaders go from “smart” to the “smartest” in customer service, and so can you! ■

## About eGain

eGain (NASDAQ: EGAN) customer engagement solutions power digital transformation strategies for leading brands. Our top-rated cloud applications for social, mobile, web, and contact centers help clients deliver connected customer journeys in an omnichannel world. To find out more about eGain, visit <http://www.egain.com>.

Headquartered in Sunnyvale, California, eGain has operating presence in North America, EMEA, and APAC.

To learn more about us, visit

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# VERINT®

## Service with Sizzle: Using Knowledge Management to Drive Better Customer Engagement

There's a lot of talk surrounding customer service—specifically *excellent* customer service—and how to deliver it effectively. Why? Because service is a true competitive differentiator, and no matter how skillfully your organization attracts and engages customers across channels, you won't keep them for long if your service isn't great.

To wow customers with service that sizzles, start with the fundamentals: the ability to provide your employees with the right knowledge to respond effectively to customer inquiries. Your goal is to put the best tools and resources in the hands of the skilled practitioners who significantly impact the customer experience. This is the realm of knowledge management, and it's key to delivering complete, consistent, and contextual experiences. Let's take a closer look.

### DELIVERING COMPLETE EXPERIENCES

You may already be weaving the various points of interaction together seamlessly for your customers, but what about for your employees? Knowledge management can provide them with key customer information that spans across products, lines of business, and communication channels, so they can deliver informed service that reflects the complete customer experience. Having all of this information in one place also helps address potential barriers to delivering top-notch service, such as the need to toggle between too many systems, lack of guidance for completing new or complex processes, and long handle times spent searching for information.

### PROVIDING CONSISTENT ANSWERS

Knowledge management databases are equipped to contain a lot of information—anything an employee would need to know to deliver the right answers and resolve issues. Having a single, central knowledge base helps



ensure that your customer service team provides a consistent set of answers every time, regardless of location or channel. It can also empower employees to resolve issues on the spot, rather than having to pass customers on to subject-matter experts. It's a simpler, "one and done" approach for customers—and for your employees, too, since they can use a single interface to complete tasks and follow processes. In addition to looking up answers to common questions, your staff can input new information they've discovered, which can help expedite future interactions, while further reinforcing delivery of consistent answers.

### OFFERING CONTEXTUAL VIEWS

Employees are most empowered when they're provided with a contextual view of the customer to personalize their interactions. A "contextual view" is all of the information—data points and next best actions—needed to answer questions and follow processes. Data points about the customer can be used to predict what knowledge and other information is likely to be needed next. Instead of searching

through the thousands (or millions) of articles in the knowledge base to answer a question reactively, the most likely candidates can be presented proactively based on the customer's contextual data points. This can make interactions faster and more natural, allowing employees to hone in on the customer and deliver personalized service. In turn, customers are more likely to feel valued and that their issue really matters to your organization.

Verint® offers knowledge management and other solutions that can help your organization simplify, modernize, and automate customer engagement. We can help you turn customer engagement into a sustainable competitive advantage, while reducing complexity and cost in customer operations. Contact us today. ■

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# A Practical Guide to AI in the Contact Center

Are you interested in how artificial intelligence (AI) might impact your contact center?

What are the practical benefits of AI today? What kind of challenges arise from automation? What are the underlying technologies at play?

In our latest e-book, *A Practical Guide to AI in the Contact Center*, we've answered these questions and more. We have examined AI from a pragmatic lens and offered suggestions to minimize costs and maximize returns.

## WHAT IS AI?

People tend to generalize their discussions of AI with all the underlying technologies. The artificial intelligence definition is open to interpretation. After all, there are several levels of "intelligent." For the purpose of business, we typically consider technologies that simulate or supplant human action as "AI."

The ambiguity of AI makes it a difficult concept to invest in. The idea of advanced technology deposing human effort has overt appeal. However, without a directive, AI is wasted intelligence.

Do you want a chatbot that can take and place orders in lieu of call center representatives?

Do you want a program that analyzes customer data and serves personalized marketing materials? Do you want an IVR that can understand natural language and route customers to appropriate agents?

## LET'S LOOK AT SOME OF THE UNDERLYING TECHNOLOGY AND POTENTIAL BENEFITS:

### Natural Language Processing (NLP)

Understanding language is a huge part of the AI equation. Language is complex and variable. Computers become more powerful and user friendly as they ingest language formulas and convert words to command functions. Whether through audible inputs

or chat, the more accurate the NLP, the better the AI can interpret inputs and match appropriate responses.

### Voice Recognition

When a command starts as voice, AI must turn inflections and tones into text script. AI then interprets that text script and delivers a response. AI models that use voice recognition rely on trigger phrases and words for their understanding. When you ask Alexa or Siri what the weather is like, you are engaging voice recognition and an NLP system. Applied to the contact center, this type of digital signal processing (DSP) helps create advanced IVRs, voice transcriptions and some forms of advanced case management.

### Machine Learning

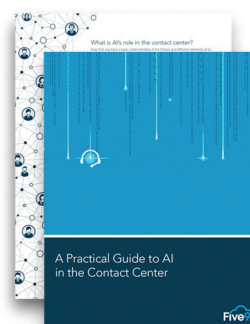
Machine learning is a foundational component of AI. The concept of machine learning is to have a base set of protocols that kick off a particular action. Then, have those protocols learn additional rules from responses to ascribed actions. We tend to think of machine learning as the scary doomsday element of AI – robots taking on more autonomous action than originally programmed. But actually, companies today are applying machine learning with narrow parameters, only allowing AI to learn specific tasks without broad variability.

### Chatbots

Chatbots are an increasingly popular use case for an NLP and machine learning combination. You may have seen news of Facebook chat sessions led by fully automated service chatbots, but the idea of autonomous communication is nothing new. Similar to voice recognition, chatbots follow key words and phrases to assume an appropriate response. Often companies limit chatbot responses to a list of potential commands. If a query does not meet answer criterion, the chatbot may push the chat to a live agent. Chatbots today are mostly used as FAQs or as an additional form of call deflection. Chatbots may also serve as a routing tool, first used to decipher a customer's need and then pushing that context to a live agent.

### Cloud

Cloud creates synergy. Its main function is to relieve the strain of on premises IT infrastructure and shift resources to a more centralized system. Cloud allows companies to appropriate processing and data storage power at scale. Companies can add more computer power to serve advanced program functions, and scale down if they need to conserve their IT spend. It's a much more economical model than buying a bunch of computers that may or may not accommodate needs. Cloud is the reason many companies can deploy AI today. Rather than pay for their own super computer, companies can lease AI through the cloud network. That, or they can build their own AI that scales according to demand rather than constantly monopolizing computational bandwidth. ■



Download the full [Practical Guide to AI in the Contact Center](http://www.five9.com/media_library/ebook/eBook_AI_Contact_Center_Practical_Guide.pdf) at [www.five9.com/media\\_library/ebook/eBook\\_AI\\_Contact\\_Center\\_Practical\\_Guide.pdf](http://www.five9.com/media_library/ebook/eBook_AI_Contact_Center_Practical_Guide.pdf) to learn more about AI's role in the contact center, how it's being used by companies today, how to prepare for an AI future, and more.

### About Five9

Five9 is the leading provider of cloud contact center solutions, bringing the power of the cloud to more than 2,000 customers worldwide. Five9's solution helps contact centers create exceptional customer experiences, increases productivity and boost revenue. For more information visit [www.five9.com](http://www.five9.com) or call 1-866-898-4019.



# Get Social With Your Customers

## HOW SOCIAL MEDIA HAS IMPACTED CUSTOMER SERVICE

It wasn't long ago when the power of social media was often debated as more of a trend or phenomenon. But think of all the people you know who haven't heard of Facebook, Instagram or Snapchat... Not surprisingly, it's not very many. Social media has become so embedded in our everyday lives, it's no wonder that many companies are also turning to social channels to promote themselves, gain fans and followers.

And in return, customers are turning to these channels to seek out customer support. With social media being such a public platform, companies need to create a social media strategy for dealing with customers in order to stay competitive and maintain their image.

## THE VALUE OF SOCIAL SERVICE

A recent study by Aberdeen Group<sup>1</sup> found companies that embraced social media as part of their customer service strategy saw results in a variety of areas:

- 5.3% increase in first contact resolution rates
- 5.3% decrease in customer complaints
- 6.7% increase in year-over-year revenue

In comparison, companies who did not incorporate social media saw:

- 2.4% decrease in first contact resolution rates
- 4.6% increase in customer complaints
- 12.1% decrease in year-over-year revenue

## SOCIAL MEDIA – A TWO WAY CONVERSATION

The rise of social media has clearly impacted how we need to look at customer service. It's no longer good enough for a company to simply have a presence on social media. Customers are expecting social media to be part of their experience with you. Just like you use your personal social media accounts to connect with your friends, customers are looking to use these same channels to build their relationships with your company. A 2013 study from J.D. Power and Associates surveyed more than 23,000 U.S. online consumers<sup>2</sup> who had interacted with an organization's social media channels. Of these, two-thirds had used the businesses' social resources to receive customer service. By

comparison, only one-third engaged with social marketing campaigns. A social media campaign that only focuses on marketing, rather than service, is limiting in terms of the potential for developing genuine client relationships.

## GET PERSONAL

Social media is all about making connections. And as impersonal as it may seem, it really is personal. We put up photos of our special moments, write our innermost thoughts and express our honest opinions. Social media channels are spaces where people create portraits of themselves and share what they want people to hear. It's also the space where many people choose to inform others of their own positive or negative experiences. Just one interaction with a company's products or services, good or bad, is enough to influence the opinion of tens, hundreds or even thousands of people they are connected to. Developing a strong social customer support strategy is vital to curb any customer service disaster and for continuing the stewarding of positive relationships. Personalization is key in this realm for managing relationships in a space where customers can make even their "private" conversations public in the blink of an eye.

When agents are available, addressing customers by their online name and noting the subject of their post automatically makes that customer feel valued and already heard. Everyone likes to feel unique. Social media spaces are not any different. In fact, it is these platforms where the need for feeling unique is arguably heightened.

## MANAGE EXPECTATIONS

Not all companies can afford to have customer service agents monitoring their social media channels around the clock. If your agents are not available after hours, or if you have a higher than normal number of customers needing support, it's best to be honest in letting your customers know if/when they are receiving an automated message and when they can expect an answer.

Some customers will send requests or messages through social media that you will not be able to handle through the same channel. By outlining clear guidelines on what your social media channels can or cannot do at the very beginning, you will minimize the amount of



potential customer frustration (for example, if you are not able to process payments through Facebook, orders through Instagram, etc.). All in all, to stay relevant, social media needs to be embraced as a platform for companies to connect with their customers.

By providing high-quality support through social media, businesses can drastically improve the chances that they'll see a greater amount of positive mentions and likes. Conversely, a subpar effort will turn off customers, and they'll already be in a prime position to share any negative experiences they've encountered with your company and your brand. Telax Voice Solutions provides a world-class Cloud Contact Center solution that allows for social media integration, ensuring that your company and your agents are on top of commentary, feedback and mentions made towards your company from your customers originating from your social media channels, helping your company achieve remarkable customer service results to help elevate your brand reputation.

We can help ensure that you get the human capital you need to ensure your agents are empowered to deliver optimal customer service. Furthermore, unlike most over-the-top cloud solutions, Telax's unique partnership with your Communication Service Provider enables your cloud contact center platform to become part of your unified communications by integrating directly within your Service Provider's network; delivering increased reliability, superior voice quality, and faster more accurate resolve times. Contact us today! ■

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<sup>1</sup> <https://www.forbes.com/sites/andrewstephen/2017/09/28/when-it-rains-data-focus-on-customers-needs-skills-and-good-governance/#388606c01803>

<sup>2</sup> <http://telax.com/the-rise-of-social-customer-service/>



# Improving Customer Experience through Improving Your Customer Support Stack

Have you ever finished a call to customer service thinking, “Wow, that was too easy” and felt like that customer service team has their ducks in a row? Amazon is masterful at the art of customer service and is a standard that many companies in the B2B realm are also trying to replicate. Think about the last time you had to deal with Amazon on a return where a bot helped you through the process and predicted your next question, or immediately sent you to the right Customer Service Rep (CSR). Don't you wish that all customer service interactions were that easy?

At Plus Consulting we get a lot of customers asking how they can improve their customer service using CRM to be “more like Amazon”, and as such we have become experts at scouting out the latest technology and implementing it for our customers. Our customers have seen incredible results from it, including a vast improvement in customer loyalty.

Below our Plus CRM practice directors share some of the coolest new trends in customer service CRM technology and how they will help you build a state-of-the-art customer service experience for your customers:

## BOTS

Bots are like smart virtual assistants that allow a user to engage with a customer in real time through a pop-up chat window. They use logic to predict what the customer needs are based on usage information (i.e. what page on the website they are on), triage the need to a deeper level and then direct customer to either a knowledge base article or a live person. This can either reduce the time a CSR needs to be on a call with the customer because there are more details about the case upfront or it can eliminate the need for a call to a CSR which frees up time for other calls.

## OMNI-CHANNEL ENGAGEMENT

Customers expect to be able to engage with customer service in many ways including, calls, emails, social media, and websites. Omni-Channel engagement is a way for a CSR to be able to handle every form of contact from one interface in their CRM. This reduces the time that a CSR needs to jump from one screen to the next

to be able to resolve a case. It also means that a case never goes unanswered.

## REAL-TIME CSR COLLABORATION ENVIRONMENTS

CSRs are able to connect with each other on a case seamlessly by providing communication channels within CRM environment. This reduces the number of case escalations because a CSR can reach out to other CSRs that have expertise in the area.

## AI TO ASSIST CSRS

AI can assist CSRs by suggesting knowledge articles in real time to a CSR during the middle of an engagement by recognizing keywords. Also, due to analytics, suggestions can pop-up about how to better serve the customer. This greatly increases agent efficiency due to the predictive nature of AI.

## PRIORITIZED CASE ROUTING

Prioritized case routing can send the customer to the right CSR the first time around. Top tier customers that have a high dollar Service Level Agreement can be sent to a CSR that acts like a concierge in their support of the customer. Using prioritized case routing can reduce the number of interactions when a call is sent to the expert that can help them the best.

## KNOWLEDGE BASES

Knowledge bases are articles that the customer can reference about common issues before they have to reach out to a CSR. This can reduce a CSR's time in handling the same type of call

## SELF-SERVICE

Self Service is a way for the customer to be able to solve their issues without having to reach out to a CSR and can include knowledge bases or bots. Self-service empowers the customer to be able to solve their issues without contacting a CSR and reduces the number of calls into a CSR.

## SERVICE ANALYTICS WITH REPORTS AND DASHBOARDS

Tracking and analyzing the data about the customer engagement goes a long way into improving the efficiency of the CSRs and tools they have. KPIs like, “time to close a case” or “number of interactions needed to



resolve a case” can be used in order to make improvements to processes. Analyzing data about customer engagement empowers a company to be able to make improvements.

## TELEPHONE SYSTEM INTEGRATION

Integrating the phone system in a CRM enables call tracking and recording and enables the CSR to be able to work within the CRM rather from disparate systems. This increases CSR efficiency as they do not have to spend time looking up the customer information.

## CUSTOMER COMMUNITIES

A forum for customers to collaborate and solve each other's problems can be created from a CRM. This can reduce the number of calls to a CSR.

## ACCESS TO ALL CUSTOMER TOUCHES

A CSR can see all activities at an account including products used or previous service issues in order to increase the speed at which they are able to solve a case. This can reduce the time it takes to resolve a case.

All of these capabilities within CRM give companies the ability to make customer service experience easy and effortless for their customers. Incorporating the latest features in your CRM will reduce overall support cost, increase customer retention and loyalty, lead to faster case resolution and greater CSR productivity. Customers will then be more likely to repurchase, increase your share of their wallet, and will virtually eliminate negative word of mouth. ■

For more information about implementing customer service tools into your CRM contact **Plus Consulting** at [info@plusconsulting.com](mailto:info@plusconsulting.com) or call 1-800-340-0155