Transitioning to an Omni-Channel Contact Center?

Here's what you MUST consider to boost Customer Experience!

NewVoiceMedia

Introduction

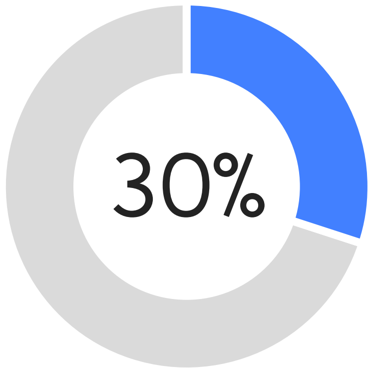
With everyone competing on customer experience, one would expect customer satisfaction to be soaring. However, customer experience (CX) plateaued or declined for most companies in 2017 according to Forrester's 2017 CX Index™ . Even worse, 30% of companies will see their growth potential decline due to poor CX according to Forrester's 2018 Predictions. Why?

Customers today are highly empowered and digitally savvy, with ever-increasing expectations which make them unforgiving when they receive poor customer service.

Unfortunately, while companies correctly invest in adding and supporting digital channels to meet customer demand, they frequently fall into the trap of independently managing each channel and using the same approach to tracking and managing Key Performance Indicators (KPIs).

Even more significantly, they implement channel strategies without considering the natural, symbiotic relationship that exists between the CRM and the contact center. This causes unnecessary effort and frustration for today's customers, resulting in CX that falls short of expectations and encourages a move to the competition.

Succeeding with CX involves transitioning to the right Omni-channel solution and transforming how you manage your digitally transformed contact center. In this paper we focus on transforming from a Multi-Channel to an Omni-Channel operation and the practical areas for you to consider.

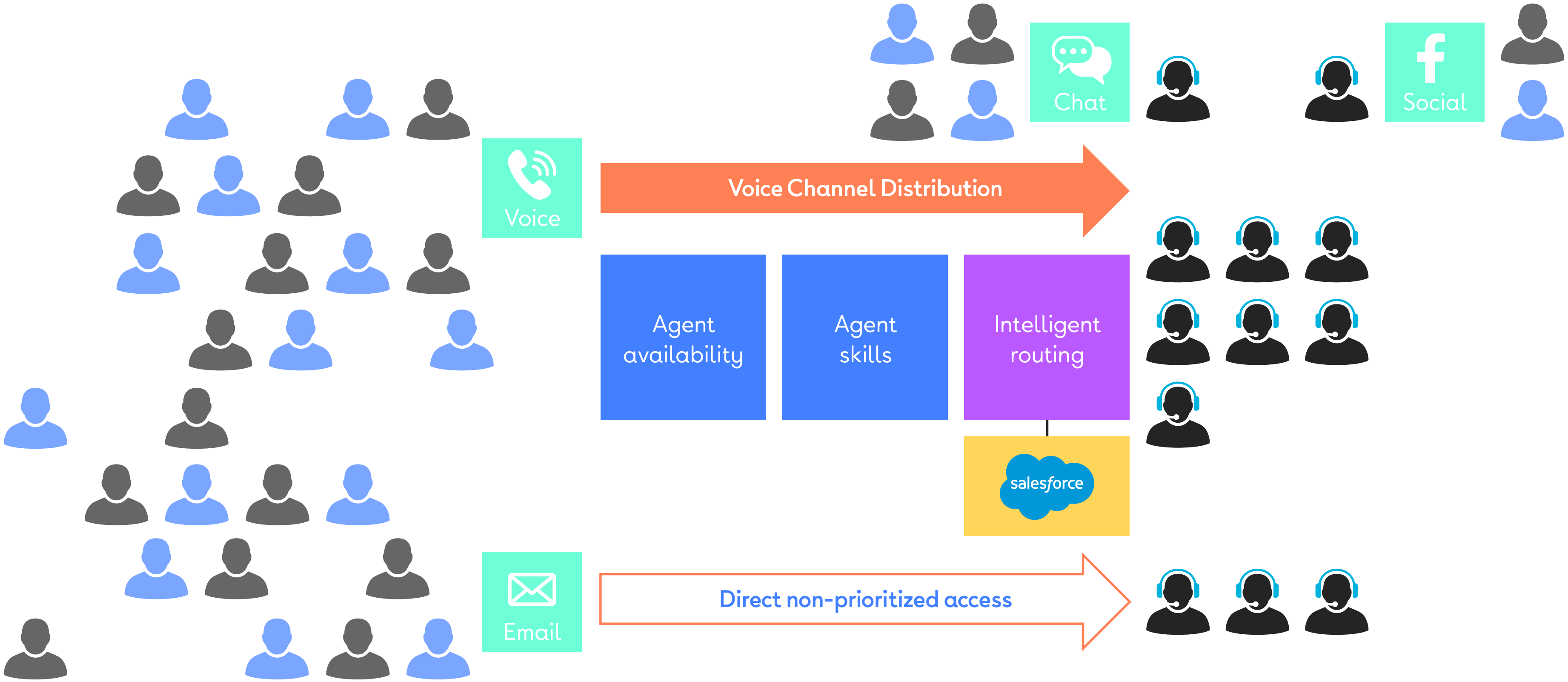


30% of companies will see their growth potential decline

Background:
Multi-Channel vs Omni-Channel operations

Most contact centers operate in a Multi-Channel mode. They have evolved by adding digital channels, piece by piece, with no larger strategy in mind. This results in a sprawling, Multi-Channel operation that allows customers to interact via many channels, but affords limited visibility, coordination or control to the business.

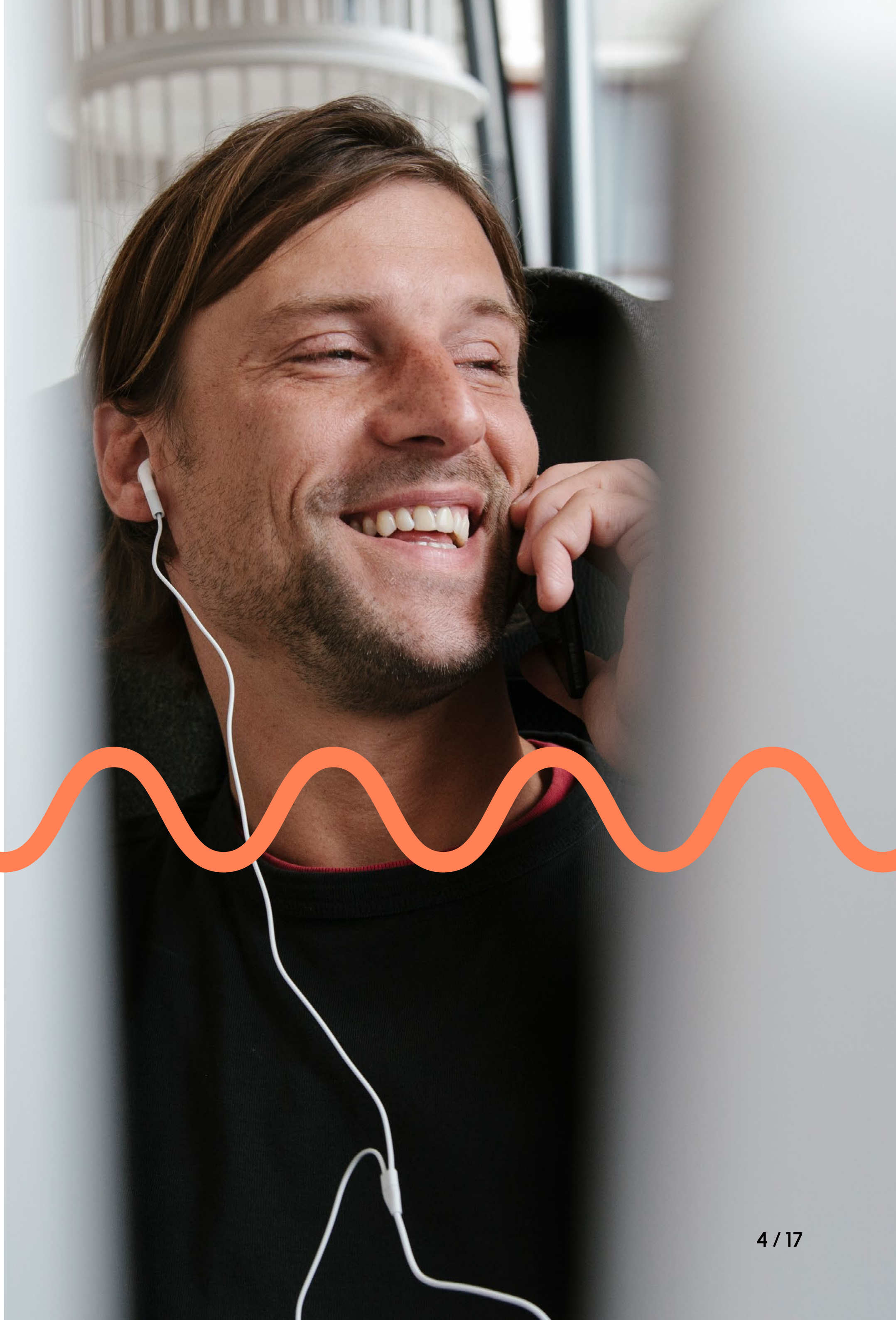
The following illustration depicts a Multi-Channel customer service operation, where the contact center uses two uncoordinated teams to separately manage voice and email. In addition, responding to chat is a sales function and watching the social channel is a marketing function.



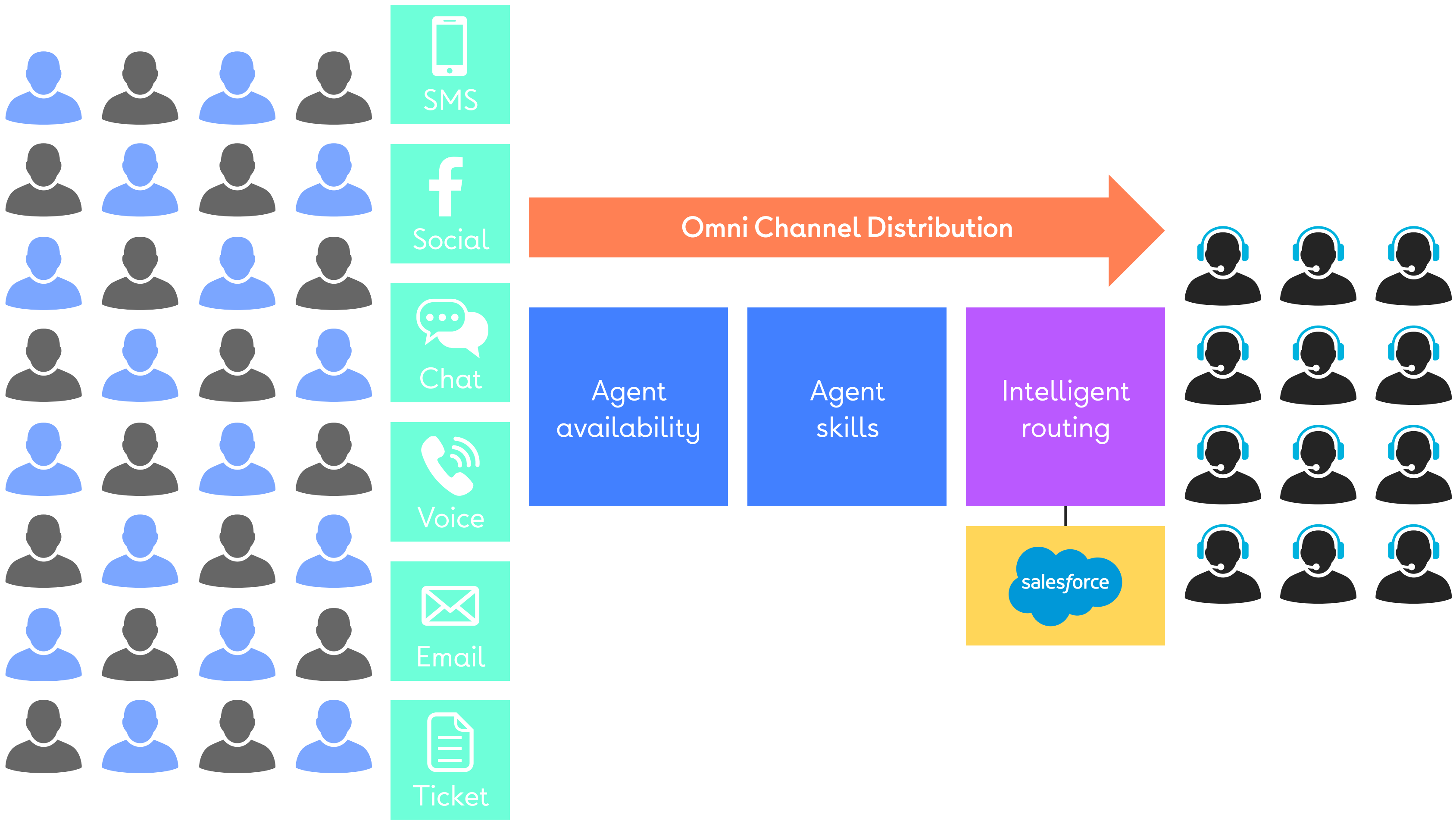
The impacts of Multi-Channel include:

- Each channel is provided by a different vendor and/or managed by a separate team.
- Interaction history from each channel is stored in its own silo or not at all.
- Customer information stored in the CRM is poorly integrated with each channel, if at all.
- KPIs are focused on individual channels and their siloed teams.
- Too much effort is required to produce timely insights for intraday management, forecasting and scheduling, or measuring CX.

In an Omni-Channel operation, all communication gets routed in a unified manner through one digital pipe to create one source of data to deliver a consistent experience that is rich, personalized and immersive while optimizing agent resources. Managers use a common rules-based routing system, governing all channels to control and prioritize which agents receive which interactions.



The following illustration shows an Omni-Channel customer service operation, where all channels are routed into the contact center, including chat and social.



Managing Omni-Channel Contact Centers to Boost CX

As you implement your Omni-Channel strategy, you'll need to rethink how you set up and manage your operations. In order to transform your contact center into a hub for seamless CX, take into consideration the following areas:

- A. Utility of each channel
  (the continued importance of your voice channel)
- B. Existing channel traffic
- C. Relationship with your CRM
  (the most important consideration)
- D. KPIs
- E. Dashboards

A.

Utility of each channel

Omni-channel means "all," but not every channel will be relevant for your customers. Some channels may be bridges to nowhere. Others may truly improve CX and overall efficiency. Identify the right channels for your business.

01 Voice will continue to play a significant role in CX. When a situation becomes emotional, complex or needs a relationship boost, people want to engage with people. Conversations will become more complex and higher value as other channels are added and customers engage in self-service for basic queries.

02 Chat has a mixed history. It can be very successful when used for short answers. But, when it is deployed for call deflection, its track record is poor. Unfortunately, most chat initiatives fail to reduce total calls coming into the contact center. Worse, chat conversations can take longer than calls, consuming agent time and availability. If chat is desirable, then set clear rules of engagement to limit conversations and steer customers to voice for faster resolution.

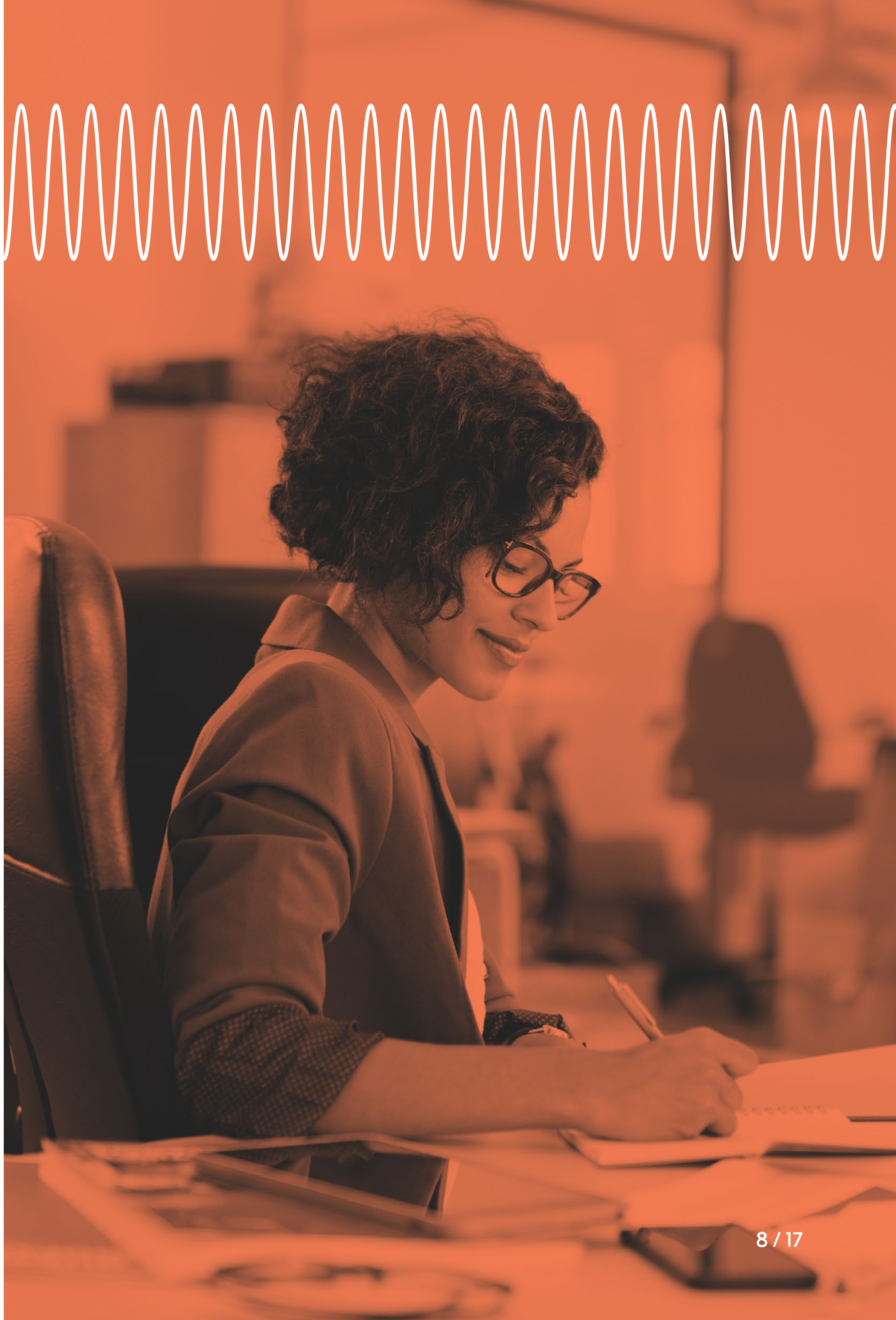
03 Email is an effective channel when written explanation may result in a clearer understanding of what is wrong before providing help. Email also is ideal for making the most of agent downtime. But it does require a different skill set than voice, so check resumes for spelling and grammatical errors and create written tests to ensure that agents can deliver the appropriate customer experience. Also, note that many agents will see moving off phones to email as a form of career progression.

04 SMS is a very effective channel for updates on service issues. Permission should be requested before using this channel, or you risk upsetting the customer (e.g. survey your customers to see what percentage have mobile plans that limit total SMS).

SMS for post-conversation surveys is also the best way to capture customer sentiment in terms of response rates. Surveys must be short; aim for a single question. Ideally, auto-log the reply into the customer's activity record in your CRM for future reference, and to create consistent data for CX reports.

05 Social is an inbound communication channel, but it is typically sponsored and owned by Marketing. Work with Marketing to service the social channel or own it entirely. Customers have learned that escalating service issues into public channels can produce faster resolution (or at least satisfy their frustration at lack of resolution).

06 Web-to-case or email-to-case is a useful channel. Permitting customers to initiate their own cases is an effective call-deflection technique, and it allows them to explain their problem in their own words. Proper CRM integration will allow these cases to be distributed under the same SLAs, which will maintain continuity of service.



B.

Existing channel traffic

Avoid the mistake of developing a strategy without looking at the history. This will help with determining the right channel mix relative to your resources and CX goals.

01 Understand customer preference. If running a B2B customer service operation, conduct a survey. If B2C, identify customer demographics and pay attention to customers' ages, which strongly influence channel preference. Try a survey if possible.

02 Study your competitor's channels. They may have a clearer understanding of customer preference than your operation. Submit a request and see how long they take to respond. Did they answer your question? How much effort did it take? How did it make you feel?

03 Gather the historical activity of your current channels. If you cannot get a year's worth of data, aim for a month. If you cannot get a month, get a week.

04 When looking at these statistics ask yourself, "Was this channel properly promoted and managed?" This might require you to consider how the channel was launched, or if customers decided the channel was useless.

C.

Relationship with your CRM

The relationship with your CRM is probably the most significant focus area that can make or break your CX delivery and future proof your contact center. Successful organizations recognize that they cannot operate without deep integration between the contact center and the CRM. The CRM is the single source of truth for customer information. For every separation point between it and your contact center, there will be a reduction in agent efficiency, management control and the CX. Your CRM should be an integral part of your contact center operations and decision-making,

01 Make your CRM your contact center interaction data repository. Avoid creating and managing a separate data silo that contains the interaction history, which is the source of so much inefficiency in the contact center.

02 Auto-log into your CRM as much as you can, including call detail records, post-call surveys and call recordings. Relying on manual data entry for everything is problematic. Auto-logging will boost the total quality of CRM data and make analyses much easier.

03 CRM integration should drive routing and be dynamic. The CRM will have the best and most up-to-date information about customers. Dynamic routing ensures that any new information in the CRM, like changing a customer's status from Gold to Platinum, will automatically be incorporated in routing decisions. An Omni-Channel routing engine uses this data and business rules to consistently prioritize each conversation regardless of channel. Click here for more information on Omni-Channel routing.

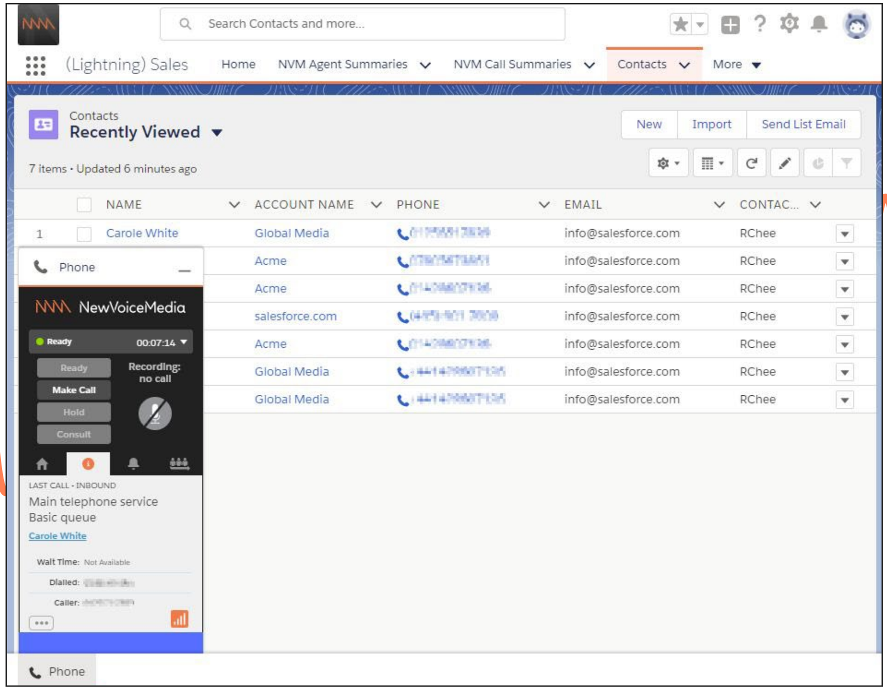
04 Proper customer identification and context boosts the customer experience. Prepare agents with CRM activity history and other context before they engage customers. Customers respond when they feel recognized, versus having to repeat their problems and issues. The ability to choose any field in the CRM for a screen pop or caller notification is key.

05 Watch for your custom CRM fields, which can indicate what makes your operation unique.
If your operation needs a custom field in your CRM, consider its potential relevance for routing your customer inquiries or for providing contact identification before conversations start.

06 Agent consoles within CRM are more effective. Your agents will not have to toggle between apps while they check CRM or enter information.

To read how other operations integrate their CTI solution into their CRM, click here.

The following is a screenshot of an agent's NewVoiceMedia Contact Pad residing within Salesforce Lightning CRM. The agent is looking at a list of recently viewed customers. Should the agent drill down to look at the customer's page in the CRM, the ContactPad will remain open and present.



D.

Choose Your KPIs

Contact centers suffer from a "fat and starving" data paradox that gets in the way of differentiating on CX. Contact centers have more metrics than any other department. Yet most of these are ACD-generated metrics that focus on routing or agent efficiency. If agents are judged only by Average Handle Time, then expect that result.

If the goal is to differentiate operations on CX, then consider categorizing your measures by contact center efficiency, customer effort and customer satisfaction. Some measures, like transfers, impact all three categories. Others, like Average Handle Time, may perversely achieve efficiency at the expense of satisfaction, when customers get hustled off the phone or transfered to non-functional queues to reach a desired AHT.

The following KPIs deserve special consideration in an Omni-Channel contact center focused on improving CX.

- First Contact Resolution (FCR) - Track across all channels to ensure that each channel is providing the right level of resolution. If your digital channels are set up to handle the easier, repetitive issues, they should have high FCRs. Continue to focus on your increasing FCR in your voice channel, especially if that's where the more complicated, high-value calls get routed. Lastly, relying on your CRM to officially declare "FCR" is much easier and more effective than tracking callbacks in an interaction-only CTI data silo.

- Customer Satisfaction (C-Sat) - Customer satisfaction should be tracked separately from FCR. Customers may see their issues resolved, but be completely dissatisfied with the process. Short surveys (e.g. one question) are best, and should be sent quickly after the interaction and automatically stored in the CRM.

- Net Promoter Score (NPS) - This is a variation of customer satisfaction, with an emphasis on measuring customer loyalty. The Net Promoter Score is an index ranging from -100 to 100 that measures the willingness of customers to recommend a company's products or services to others.

- Service Level Agreements (SLAs) - Answering a customer interaction within a desirable time period is key to successful engagement. An Omni-Channel routing solution will make this much easier because the data from multiple channels is normalized and stored in CRM.

- Transfers - Transfers are a strong indicator of problems. The trouble is finding the source. Was a transfer required because of poor routing logic, agent training or customer confusion? The impact of a transfer is clearer when paired with FCR and C-Sat/NPS. Cross-channel transfers should also be tracked separately from same-channel transfers (e.g. from one agent to another in the voice channel) to make sure the conversation is concluded and follows a desired path.

- Average Handle Time (AHT) - AHT is a core efficiency metric and is needed to predict agent schedules. AHT gets complicated when used for channels where multiple conversations can occur at once, like chat or social. A good Workforce Management (WFM) solution will sort that out. The reliance on AHT should decrease when adding C-Sat and FCR, which is the path towards better CX.

- Agent Adherence - An Omni-Channel solution makes agent adherence easier to track because some digital solutions do not track if agents are actually logged in and following a schedule.

E.

Use an Omni-Channel Dashboard

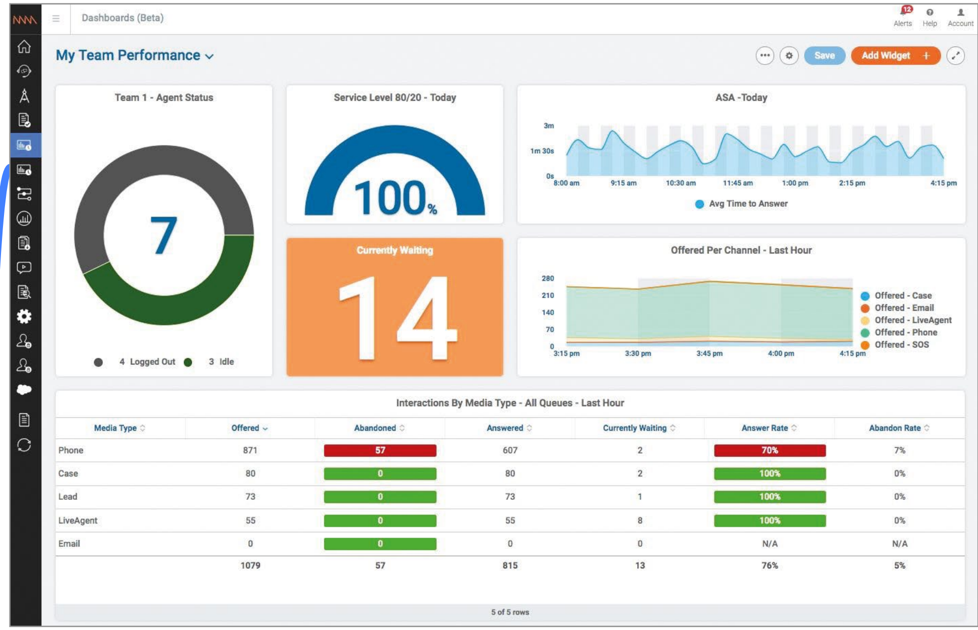
Once you have arrived at the correct mix of KPIs, it is time to consider how and where the KPIs are used.

To drive success, you need the right information in your dashboards. Moving to an Omni-Channel solution and placing interaction data in the CRM brings new clarity across your entire operation. At a macro level, contact center managers can understand interaction activity across all channels, with satisfaction scores, First Contact Resolution and activity KPIs all tracked together. Ideally, this information is available in real time to improve intraday crisis management.

At a micro level, an agent can see a customer's journey while trying to solve their issue. Or, an analyst can quickly jump to statistical outliers while understanding customer context.

Successful operations will ensure that management and agents are on the same page about their performance. It makes no sense to judge agents on C-Sat or FCR (or other efficiency stats), if they cannot see the KPIs, or get the information too late to change their behavior.

Lastly, wallboards are dashboards too. Using real-time data, they allow the entire operation to more easily work together. Consider showing more than the standard queue-metrics, such as C-Sat and/or FCR, to remind everyone how your operation should be evaluated. What gets measured, gets managed.



Click here to learn more about Omni-Channel Dashboards .

CONCLUSION

Every business claims to compete on customer satisfaction, but the goal remains elusive. Customers want a personalized customer experience with low effort and expect it consistently across all channels. In order to succeed with CX, you must transition to Omni-Channel operations. The key takeaway is that you can ease your transition from your current set-up by carefully considering your channel mix, consistently managing digital and voice channels, recognizing the symbiotic role of your CRM, and placing your emphasis on the right KPIs and dashboards.

Focus on these areas to deliver a great customer experience and drive business success.

NewVoiceMedia

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NewVoiceMedia is a leading global provider of cloud contact centre and inside sales technology that enables businesses to create exceptional, emotive customer experiences to serve better and sell more.

Its award-winning platform joins up all communications channels without expensive, disruptive hardware changes and plugs straight into your CRM for full access to hard-won data.

With a true cloud environment and proven 99.999% platform availability, NewVoiceMedia ensures complete flexibility, scalability and reliability.

NewVoiceMedia's 700+ customers include Canadian Cancer Society, Ebury, FCR Media, FlixBus, JustGiving, Kingston University, Lumesse, Paysafe and Vax.

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