7 Key Decision Points for Implementing an Omnichannel Contact Center

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INTRODUCTION

When choosing an interaction management system, people are confused as to what technology to use to support their contact center. Many are now looking toward Customer Relationship Management (CRM) vendors to supply the customer experience center tools and systems required to support a large customer base, while others continue to evaluate traditional contact center technologies.

CRM based customer experience tools are designed from the ground up to provide information about your customer base, and they can supply channels easily in an integrated and cookie cutter fashion when dealing with small volumes of interactions or customers.

CRM solutions fall short in several areas when providing service for large, formalized contact centers; namely their lack of support for other critical business applications, their inability to provide channel flexibility, data 'leakage' from missed interactions, a poor agent experience; and their inability to provide the business with the tools and key performance indicators needed to manage agent and customer populations in a formal contact center environment to improve overall service delivery and customer satisfaction.

For informal or department level service providers, CRM based tools provide excellent ad hoc tools to provide easy entry into the realm of customer service.

For formal contact centers, businesses should look to the 30 years of evolution in contact center infrastructure and recent trends in omnichannel flexibility to truly provide exceptional customer service. Managing an industrial grade contact center requires setting and tracking of consistent key performance indicators across all channels, and taking action on the information captured.

When evaluating your contact center in the context of the omnichannel customer experience, there are 7 factors that must be taken into account:

1. Business Application Support
2. Business Tools
3. Customer Context and 'Data Leakage'
4. Agent Experience
5. Customer Experience
6. Channel Flexibility
7. Key Performance Indicators

1. BUSINESS APPLICATION SUPPORT

I have not yet encountered a contact center who uses a single agent application to provide customer service. I have heard the dream – the 'single pane of glass', but I've never actually encountered it operating in a contact center. A large health care organization I spoke with had a CRM team who seemingly had the mandate to finally provide that mythical desktop. I spoke with various stakeholders across the business, and discovered that, although the business was fully bought into the idea, there was a cognitive dissonance at work. A critical business application used across the business was "never going away" – it was out of scope for the CRM initiative. Further exploration found that there were multiple other vertical business applications in use, and in fact, there was another large area of the business that used a completely different CRM system – and that wasn't going away.

Now you may say "wow, that's crazy", but more likely you're saying, "yeah that's us." I know this, because from our information, 71% percent of our customers continue to use a vertical business application.

In that same poll of our customers, we found that the average number of business applications used for customer service was 7.3. One analyst tells us that businesses really should target getting down to 3, and a major Canadian telco has a best practice of 4. The implementation of a system that replaces every single customer facing business application and process used in your organization quickly becomes an exercise in boiling the ocean and is therefore significantly scaled back, leaving an even more complicated agent desktop. Of note, in our short survey we also found that almost 50% of businesses also used 2 or more CRM systems concurrently.

When looking to fulfill the requirements of providing customer service, CRM becomes one more (albeit major) business application to be used to help provide customer service. By using CRM to provide interaction handling and the customer experience center capabilities, other business applications are left as islands. A properly implemented contact center infrastructure should result in channel-less business applications, so that it can be used to leverage not only CRM, but also to extend the life of the other business applications and to help improve customer experience by ensuring that agents have the same toolsets and capabilities regardless of the application they use to service the customer request. This allows the business to use consistent management doctrine across everyone business unit that impacts customer service.

2. BUSINESS TOOLS

The blossoming of interaction channels has seriously complicated service delivery, which has led to a recent decline in overall customer satisfaction. Businesses struggle to deal with interactions on digital channels that continue to increase in volume. Contact center professionals are well versed in the tools needed manage a voice based call center. But those same subject matter experts seem to have 'left the building' when it comes to ensuring that those tools are available for new interaction channels.

Providing agent automation tools and integrations to business applications assists the agent in service delivery, and are actually quite visible to the caller on the other end of the phone. But these integrations are often left out of the equation when evaluating the cost benefits of supporting digital channels. This leads to inconsistent information and partial customer context. Agents with different tool sets will respond differently to the same request because of the information made available to them, severely

impacting service delivery. Normalizing interactions across channels lets a business integrate once and cost effectively ensure that tools used by the agent are consistent, improving the customer experience, improving accuracy, and reducing training development and delivery costs. This also allows your business applications to remain channel-less, and provides a consistent set of information and processes for use across the business, regardless of the channel used, and regardless of the application used to fulfill the request.

3. CUSTOMER CONTEXT AND DATA "LEAKAGE"

Enabling the multiple applications used in a contact center ensures that every interaction is captured, regardless of how it is fulfilled.   Even industry leaders that look to CRM solutions to capture and track interactions agree that the number of phone cases opened in the CRM application didn't match the number of calls listed in the PBX. This is data leakage and it's a bad thing.

There are three types of data – data that is accurate, data that is wrong, and (the worst!) data that looks accurate and is wrong. It's the last case that we encounter when tracking customer contacts in CRM. When the agent goes off book to resolve a customer's issue and uses the AS/400 billing application or the vertical market healthcare application, the interaction isn't entered into the 'single pane of glass' CRM application. That results in a customer interaction history that looks complete and accurate, but actually isn't.

Missing interaction data means that you can't understand your customer experience; that means you can't improve your customer experience. And worse, it means you don't know these things so the actions taken may be wrong.

> *A large telecom provider undertook to track First Call Resolution. The numbers were good. At a time when the industry average was 70%, this company had an FCR rate of over 80%.*
>
> *This posed a conundrum for the CEO, who wanted to understand why, if FCR was such a great satisfaction metric, their customer satisfaction was at an all-time low.*
>
> *Fast forward to the answer. To calculate FCR, the technical gurus had decided to count repeat calls in the IVR system. Since the IVR would prompt for the customer's phone number, they simply looked at repeat calls within three days, and got a mid-80% FCR rate.*
>
> *The problem was with their Computer Telephony Integration. They didn't transfer that phone number to most of their agents.*
>
> *It turns out that there were many repeat calls that were not being captured, because the team doing the calculation had ignored the 20% of calls that had no phone number.*
>
> *But they realized that people who called in the first time entered their phone number. And the agent didn't get it. So when they called back the second (third, fourth) time, they didn't enter the phone number because they knew it wasn't going to be sent to the agent.*
>
> *The FCR rate was actually in the mid-60%'s.*

One solution that is proposed quite often is to simply enter the interaction information into the CRM system so that the information is properly logged. This leads me to my next point and favorite soap-box:

4. AGENT EXPERIENCE

CRM solutions were built for sales teams. They were built to provide automation for ad hoc departments that needed to understand and manage the customer relationship.

Contact center agents have a clock over their shoulder. 60% to 70% of contact center costs is in salary. In a large contact center, a 2 second increase in handle times translates to a million dollars of added cost. Regardless of the company's focus on 'customer satisfaction', interactions must be dealt with efficiently (although correctly as well!) to be able to provide profitable service.

As a result, the average agent in a busy contact center is dealing with 60 to 80 interactions a day, every day. They do the same thing over and over and over. So telling them to stop and go and fill in a CRM case on every interaction, when they didn't use the CRM system to resolve the issue, is pure management overhead to them. It's time that is held against them (longer AHT), and ultimately it costs the company money.

Another area of concern for an agent is simply the number of mouse clicks or keystrokes they need to perform to get to the place they need to be. Loading web pages; moving forward and back through CRM screens; scrolling screens up and down, all take time, cost money, and increase agent frustration. CRM has not been designed with this in mind and as a result usually ends up providing a less than stellar agent experience.

Providing good management information about agent performance across all channels allows management to focus on the problem areas and choke points in service delivery, and improve the agent experience as a result.

5. CUSTOMER EXPERIENCE

At the core, omnichannel customer experience is about providing a single customer experience across any channel – providing the same level of service as you would for a phone call, for an email, or for a chat or SMS, or a new channel in the future. Organizations need to be able to consistently provide good service, and meet or exceed customer expectations.

An omnichannel customer experience requires agents to understand the customer journey across time and across channels. This requires consistency – of information, process, and performance regardless of channel; consistent service levels, and consistent measurement.

Contact center analytics and KPIs are critical to understanding customer activity and preferences. Knowing who is contacting the organization and why empowers the contact center to optimize where and when digital channels are offered, and to whom they are offered. Being able to provide this level of personalization is key to the exceptional omnichannel customer experience.

Increasing customer satisfaction means offering a true omnichannel experience which is effortless for the customer. They can use any contact method and consistently receive the same level of service and personalization.

6. CHANNEL FLEXIBILITY

A key area that needs to be looked at is channel flexibility. CRM applications tend to be large, complex applications that instantiate some often very complex business logic. Adding new channels is never easy. Implementing a contact center infrastructure that normalizes interactions allows you to add new channels easily as the need arises, and insure that the tools and capabilities used by the agent and management are inherited across those channels.

CRM provides a set of tools that can be used out of the box, but they are typically not integrated with the voice channel, and as new channels arise, they are often not supported. Adding in a new channel paradigm into a complex business application – even if it is already supported as a channel – is not a cheap exercise and will require significant investment. If the channel is not supported by the CRM solution, then the business will likely opt for a stand-alone provider, thus creating yet another channel silo.

Channel silos are the enemy of the customer experience. They are visible to your customers; they impact your agent performance, and they increase your business costs in the long run. Channel silos are the wall that ensures that performance cannot be tracked consistently, and as the axiom says, "what can't be measured, can't be managed".

7. THE IMPACT OF KEY PERFORMANCE INDICATORS

When evaluating CRM tools, third party connectors to your PBX are used to provide integration and basic efficiency metrics for voice, but little else. On their own, these connectors do not provide direct **customer satisfaction information**, they don't provide **quality monitoring** and **workforce management** information, and they don't provide **First Contact Resolution** information. Most importantly, *they don't provide the basic contact center metrics in a consistent fashion for digital interaction types*. If you look at the metrics that are provided (and are important to a call center) – things like Average Handle Times; Schedule Adherence; Queue Wait Times; Occupancy rates – almost none of these numbers are provided for digital channels through a CRM-based infrastructure. And those that are – *are calculated differently than the phone system.* So for a customer who contacts a business on multiple channels – there is no consistent set of metrics as to how the contact center performed; how the agent performed, or what the final outcome was for the customer. Key Performance Indicators become channel specific and measure the efficiency of a channel, not the effectiveness of the customer experience.

A set of standardized Key Performance Indicators will allow you to improve that customer experience economically. Understanding the reason for and outcome of any customer interaction, regardless of the channel used, allows contact center management to improve the customer experience overall, and not just on a single channel. Eliminating the apples to oranges comparisons across channels *for providing the same service* allows management to focus on process improvement, better agent training, and over-all business intelligence.

Normalizing interactions across all channels and collecting a single set of performance indicators will directly impact several areas of the contact center almost immediately. Their primary function and benefit is to provide management with the information they need to run a customer service department as a single functional business unit. Secondary to that is the ability to manage service delivery across departments and provide a single consistent customer experience (for example, social responses

delivered through marketing in response to escalations from the voice based contact center). Some suggested examples of key performance metrics are as follows:

Average Handle Times - Costs per Channel
Providing cross channel handle time information allows a contact center to develop a true interaction cost model and assign resources appropriately.

Average Solve Rate (ASR) per Channel
Agent Solve Rates provide actionable information on how well an agent is performing at resolving customer interactions. Comparison of ASR across channels will point out the best channels for handling specific interaction types and identify process and agent performance problems. ASR is a direct derivative of First Contact Resolution metrics.

Customer Effort
Understanding customer contact patterns allows contact center management to preemptively determine a next most likely contact and act accordingly, eliminating many superfluous contact requests.

Channel Containment
Understanding a customer's cross channel behavior is key to understanding how well a channel is performing. In an era where email and chat volumes are increasing, while telephony rates continue to rise, understanding how customers move between channels and what can be done to improve channel containment is key to controlling costs and improving the customer experience.

Schedule Adherence
Workforce Management applications abound for optimizing agent scheduling for telephony channels. Extending this information to all digital channels is key to developing and maintaining an industrial grade contact center.

Net Promoter Scores (NPS) / Customer Satisfaction (CSat)
Measuring NPS and CSat across channels provides information about how well digital interactions are being handled. Pushing customers to use Chat may decrease your costs and handle times, but if Chat has an overall lower NPS/ CSat score, the effort would be detrimental to your business. Conversely, if Chat has a higher CSat score then it make sense to improve/ increase your website presence to drive more interactions through this channel.

SUMMARY

Evaluate your contact center technologies based on a) how well you will be able to manage the business unit, and b) on their ability to provide a great customer and agent experience. CRM may be touted as the new platform for a great customer experience center, and will provide a tremendous amount of value in tracking customer records to supporting business processes and workflows. But the complexity of CRM means that, for the reasons outlined herein, it is best to separate the needs of the business for CRM from the needs of the business for interaction handling.

Integration between your contact center infrastructure and CRM can enhance your CRM's value, and your customer's experience, while enabling the measurement capabilities needed for a formal contact center. It can also leverage the residual value of many vertical market applications. A flexible solution which separates interaction handling from business process allows an organization to use connectionless business applications. This allows a company to continue to evolve its internal needs and business requirements independently of its interaction channels and the communication needs of its customer base; independently of other applications, and independently of other business units.

ABOUT UPSTREAM WORKS SOFTWARE

Upstream Works provides organizations around the globe with omnichannel contact center software to increase agent success and build exceptional customer experiences. Our all-in-one, intuitive, smart agent desktop suite with seamless integration, reporting and analytics provides omnichannel interaction management and a unified view into the entire customer journey for insightful, personalized service excellence across every communication channel.

With over 15 years of award-winning, omnichannel innovation, we bring contact center expertise and a proven, market-leading solution that extends our partners' contact center capabilities. We're committed to achieving the highest standards of excellence from product design to implementation and support.

ABOUT THE AUTHOR

Rob McDougall, President and co-founder of Upstream Works has been a catalyst for change within the contact center industry for many years. With Upstream Works, he developed a successful business that provides contact center solutions to many high profile customers.

To ensure that Upstream Works continues to be a leader of innovation, Rob plays an active role in promoting the company through corporate evangelism, articles, and various speaking engagements. Rob is the author of many of Upstream Works' whitepapers.

Prior to the creation of Upstream Works, Rob held the role of R&D Director for TSB International/Telco Research, where he was responsible for product development and the tactical direction of InterLYNX CT, which served as the basis and the origins for Upstream Works' Business Interaction Management. He graduated as an Electrical Engineer from the University of Western Ontario.

FEEDBACK AND MORE INFORMATION

Thanks for reading this report. I hope that you have found some valuable information that will help you achieve your contact center and corporate goals. I welcome your comments about this white paper, and invite you to suggest other topics that you would like us to address.
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