

TOP 5 WAYS TO **OPTIMIZE YOUR CONTACT CENTER**

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INTRODUCTION

It's a well-known fact that customer experience is becoming a more important differentiator of a brand than products or price.

That's why it's critical to have a contact center equipped and enabled to deliver a top-notch customer experience at every interaction.

The ability to do this requires having your contact center fully optimized to deliver that superior customer experience (CX). And this often requires having the right strategies, technologies, people, and processes in place.

In this eBook, we define the top five ways to optimize your contact center based upon our extensive experience and work developing CX solutions for many of the top brands in the U.S.



1. DEVELOP AN OMNICHANNEL STRATEGY

Omnichannel is a buzz word that is constantly thrown around, and for good reason. It's a challenge to achieve but those companies that are successful stand out from the crowd.

So what is the definition of omnichannel? Essentially, it's a cross-channel business model and content strategy that companies use to improve their user experience. It is an integrated way of thinking about people's relationships with organizations. Rather than working in parallel, communication channels are designed to cooperate and build a coherent, evolving, cross-channel experience.

Or, in simpler terms, it's communication that uses all the channels your customers use to connect with you. That can include everything from chat and email to social media, phone, home devices, and text messaging.



→ Companies that have omnichannel customer service report an 89 percent customer retention rate, while companies that don't use an omnichannel system only report a 35 percent customer retention rate. That means that if you're not yet omnichannel, it's important to develop a strategic roadmap to become so. This roadmap should define the technologies you want to bring in, when you want to bring them in, and the benefits you can derive from an omnichannel system, such as reduced handle time and improved First Call Resolution (FCR).

One of the main challenges to developing an omnichannel strategy is that each of the different channels are often managed by different parts of an organization. For example, an Interactive Voice Response (IVR) system is typically managed by IT or the contact center operations, while social media is managed by marketing. To effectively develop an omnichannel system, you have to eliminate the silos and integrate the various systems where customer data is stored, like ensuring your IVR is integrated with your Customer Relationship Management (CRM) tool. By giving your customer service agent not only data on their previous interactions in support, but also those within marketing and sales, they can get a more holistic and personalized view of the customer, deliver a better experience, and resolve issues much faster.

Note that to be truly omnichannel, you don't just connect all of the channels; you also report against them. This allows you to be predictive, proactive, and personalized based on that journey. Using the data gleaned from all of the interactions, you can leverage your 360° knowledge to provide personalized treatments for specific journeys and subsequently predict those journeys.



Keep in mind that you don't have to do it all at once. Select the channels that have the highest volume, and unfold your plan accordingly. Strive for a balance between the channels with which your customers want to interact with you versus the modalities in which you are able to deliver service of the quality you want. Include asynchronous messaging — i.e. contact that's initiated by SMS or chat but that doesn't require an immediate response — on your roadmap, though perhaps for the future. This channel is appealing to many consumers, particularly Millennials and Gen Z, as a relatively new self-service channel, though, many organizations will need to build out the people, process, and technology for asynchronous self-service.



2. MEASURE THE RIGHT THINGS

Measuring and tracking your outreach efforts is critical to the success and improvement of your contact center.

However, you have to ensure you're choosing the right metrics to follow – the ones that align directly to your business objectives – otherwise you could wind up drowning in irrelevant data. You can start by reviewing those objectives to ensure that they are aligned to the metrics you're reporting on. If you determine that you need to refine or add to the data you're measuring against, remember to baseline the new measurements so you have a clear benchmark for seeing any changes.

Leading contact centers routinely track FCR, Net Promoter Score (NPS), and call handle time. Depending on your business objectives, other metrics that might be appropriate include sales, conversions, utilization, agent-to-agent transfers, and escalations. →

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If you know which metrics accurately measure your business drivers, you'll also know how to empower your agents to deliver the service level you want.

- Make sure that you empower agents to deliver the right level of service. Mis-prioritized metrics can drive unwanted agent behavior. For example, if FCR is a priority for your organization, but your agents are evaluated on talk time, they may prioritize handle time over eliminating the next interaction — which isn't the result you want. So you need to ensure that the metrics and their relative priority within the contact center are known and understood by all agents, as well as aligned to what the Quality team measures.

Ultimately, when it comes to metrics, it's all about alignment. If you know which metrics accurately measure your business drivers, you'll also know how to empower your agents to deliver the service level you want.





3. MAXIMIZE THE CONTEXT FOR EVERY INTERACTION

To optimize every step of the customer journey, you need to integrate your case management, knowledge management, and CRM solution center into your contact center from end-to-end.

This will allow you to draw — in a comprehensive manner — on all possible data about a customer when contact is established.

If necessary, redesign your IVR and chatbots to leverage this context. In addition, make sure the system pushes the data to the agents and they are trained to use it to proactively to personalize the experience. Even the manner in which agents greet customers should reflect what you know about them and why they might be contacting you. →

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Leveraging context is crucial when it comes to delivering a good CX because it allows you to provide a personalized, predictive experience.

- For example, if the data shows that a customer has been comparing loans online, then the greeting should be, “I see you were recently comparing rates online. Can I answer a question about our loans for you?” instead of, “How can I help you today?” It saves the customer time, speeds up the call handle time, and gives the customer the personalized attention they are beginning to expect from companies they do business with.

The same goes for any contact you have. Leveraging context is crucial when it comes to delivering a good CX because it allows you to provide a personalized, predictive experience. While these highly personalized experiences used to “wow” customers, they are increasingly expected by consumers.





4. OPTIMIZE THE WAY YOU DELIVER INTERACTIONS TO YOUR EMPLOYEES

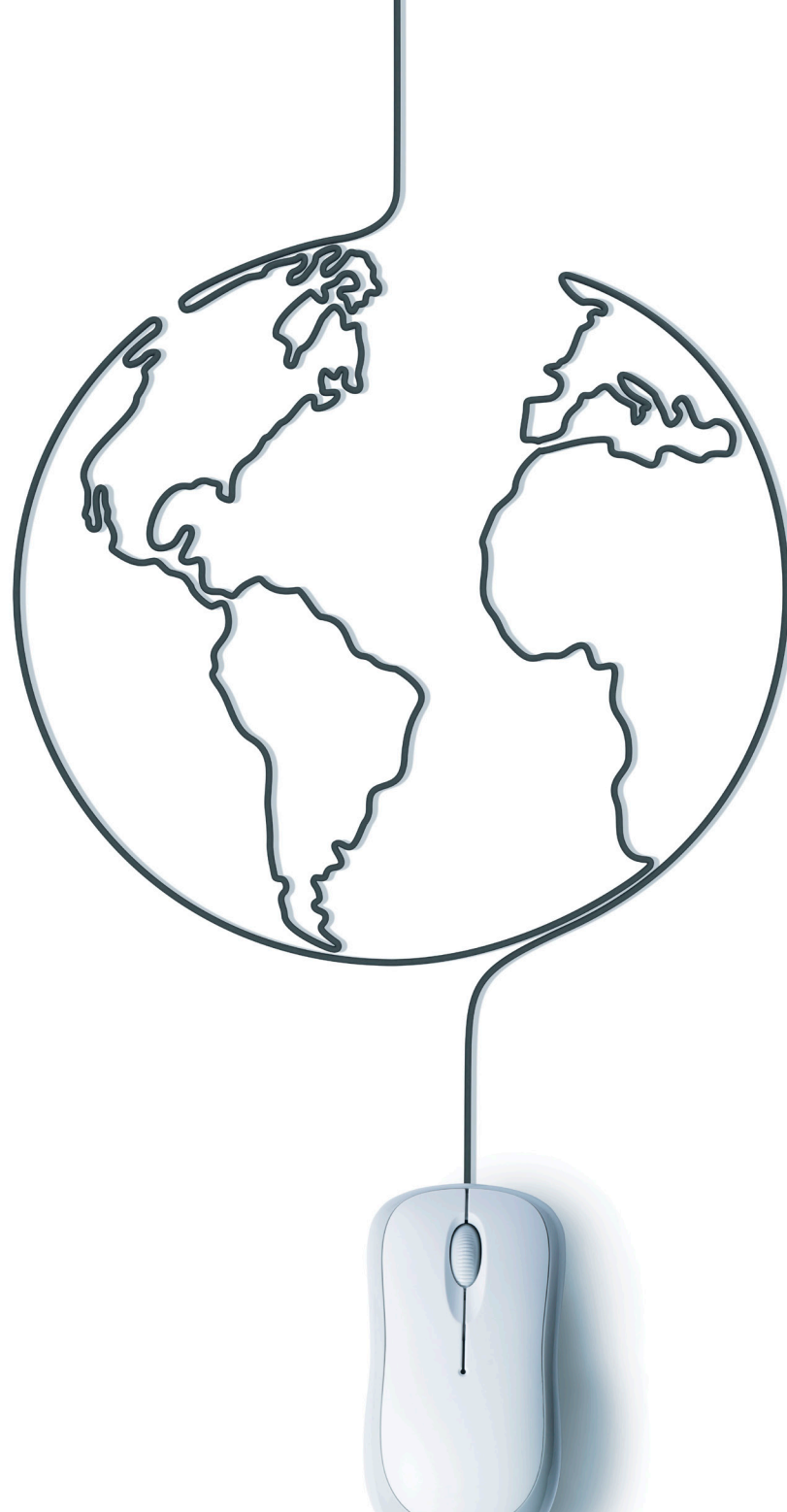
When it comes to your employees and how they receive customer inquiries, you should create a system that connects customers with agents based on their skills and your business objectives.

Regular routing platforms allow you to send interactions to specific agent groups — but beyond that, agent availability determines which interactions are connected to which agent. In contrast, a state-of-the-art, “intelligent” routing platform offers much more control and enables a far more granular delivery system. It allows you to rank agents of a single team based on their skills and training as well proficiency within that skill, so that each agent’s competency level, product knowledge, and expertise are considered when it comes to contact delivery. That means that you can deliver your best customers to your best agents whenever possible, even under peak volumes. →

- This type of intelligent routing also facilitates a faster time-to-productivity for new agents. New hires can be trained on basic tasks first, and calls that pertain only to those basic tasks can be routed to them. That way, the least experienced agents interact with customers only at the most basic level, but can do so closer to their start date.

In addition, intelligent routing platforms also provide dynamic ways to handle unexpected spikes in volume. Regular routing platforms require agents to manually switch systems in order to take on excess calls or inbound inquiries. Intelligent routing platforms can be set up so that during increases in volume, interactions are automatically distributed across all available agents. In addition to reducing wait times and preventing other possible issues, this also minimizes the need for real-time management of resources, leaving the workforce management team free to focus on forecasting.

In short, with the right platform, you have the freedom to route customers the way you want while simultaneously unburdening your workforce management team.





5. ALIGN YOUR SERVICE STRATEGY TO YOUR BUSINESS OBJECTIVES

Having a solid customer service strategy is key to providing a great experience.

A service strategy can involve many elements, and may include ensuring all of your employees are aligned on messaging and up to speed on product knowledge, having a solid infrastructure, training employees in emotional intelligence, etc.

The one thing that is key in whatever way you approach: Your service strategy needs to be informed by your business objectives. Review (or define!) your service strategy among the key stakeholders in your organization, typically including business, IT, and each of the groups involved in providing customer service in any channel. The strategy should prioritize business objectives such as FCR or ASA, map them to metrics, and supporting initiatives. If you're providing customer support for a healthcare organization, then your services need to be delivered through channels that comply with all pertinent regulations.





→ Similarly, if your target audience consists of primarily Millennials, then you'll need to consider including asynchronous messaging.

You should also segment customers based on their value to your business, which you may measure, for example, by the number of policies customers have, their lifetime value, or their propensity to buy.

It's also advisable to differentiate service in a way that your best customers are delivered to your best agents — or alternatively that brand new customers are delivered to your best agents. You could also roll out asynchronous messaging to your best customers first. This is where having the right routing platform plays an important role, as was described in the previous section. At the same time,

differentiated service could involve identifying those customers who show an inclination for expanding their relationship with you and connecting them to agents who are trained to both deliver great service, as well as increase their value to your business, for example by purchasing an additional policy or enrolling in a new plan. In short: The choice regarding which customers are connected to your best agents should be conscious and deliberate, and with the right system you can intelligently and automatically make this happen.

Your service strategy needs to align to individual agents and must be what the Quality team measures. All things considered, the strategy on the contact center floor should be the same as the strategy being determined at the top.

CONCLUSION

Clearly, there are many moving parts in a contact center that, when not properly aligned, can get in the way of achieving the results you need.

Yet you need to find ways to overcome all the challenges and integrate your systems in order to gain a holistic overview of the customer journey, deliver a seamless customer experience, and move ahead of your competition.

The best way to do this is with the assistance and support of professionals who consider your people, processes and technology and suggest a solution accordingly.

At PTP, we specialize in helping organizations develop and implement CX strategies that are innovative and align with their unique business objectives.

Contact us today to learn more about how we can help you.



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