



Enghouse
Interactive

Deliver Proactive Customer Service:

Customer Satisfaction and Increase ROI at your Contact Center

Featuring:



Art Schoeller | Forrester



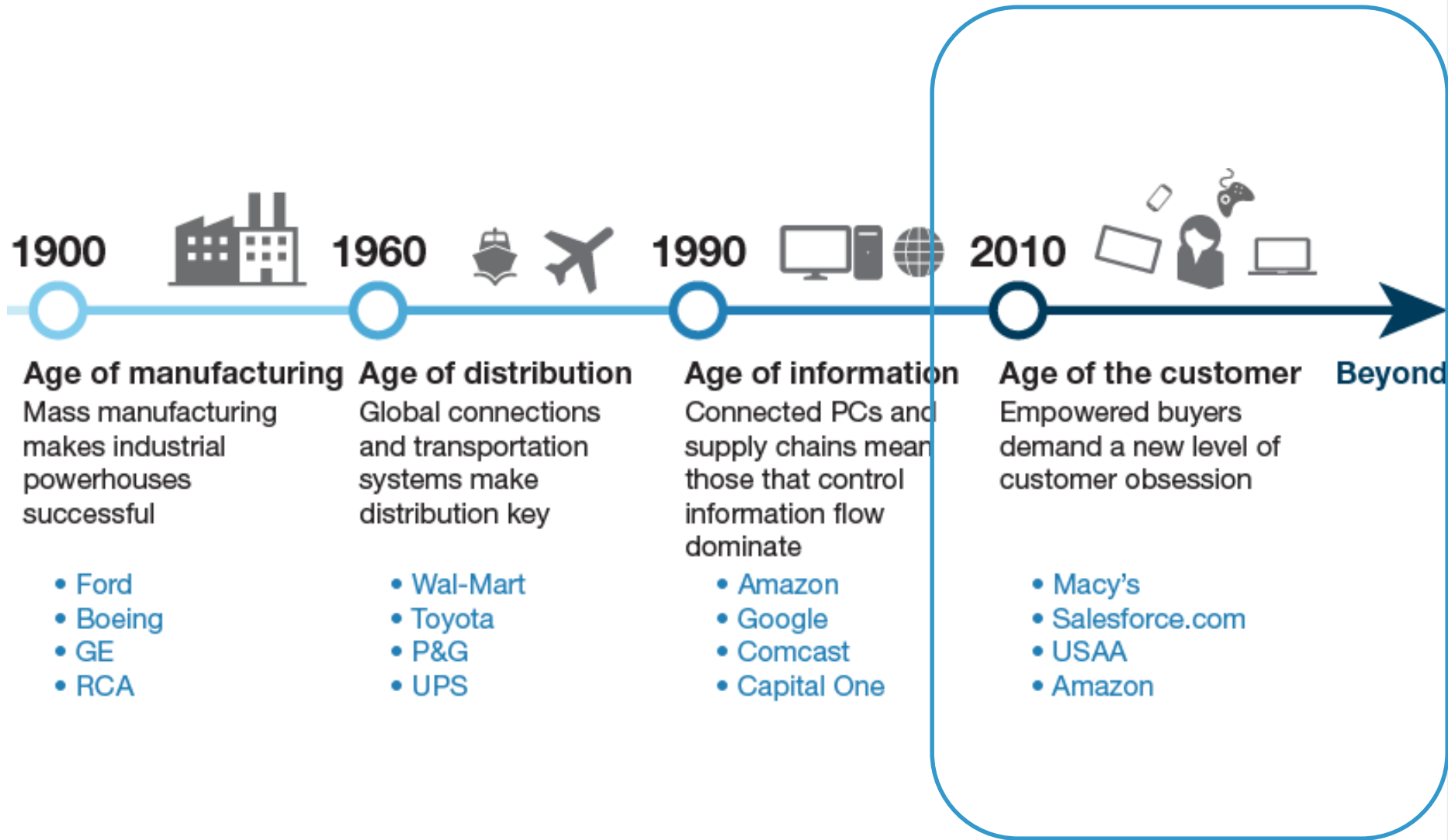
John Cray | Enghouse Interactive



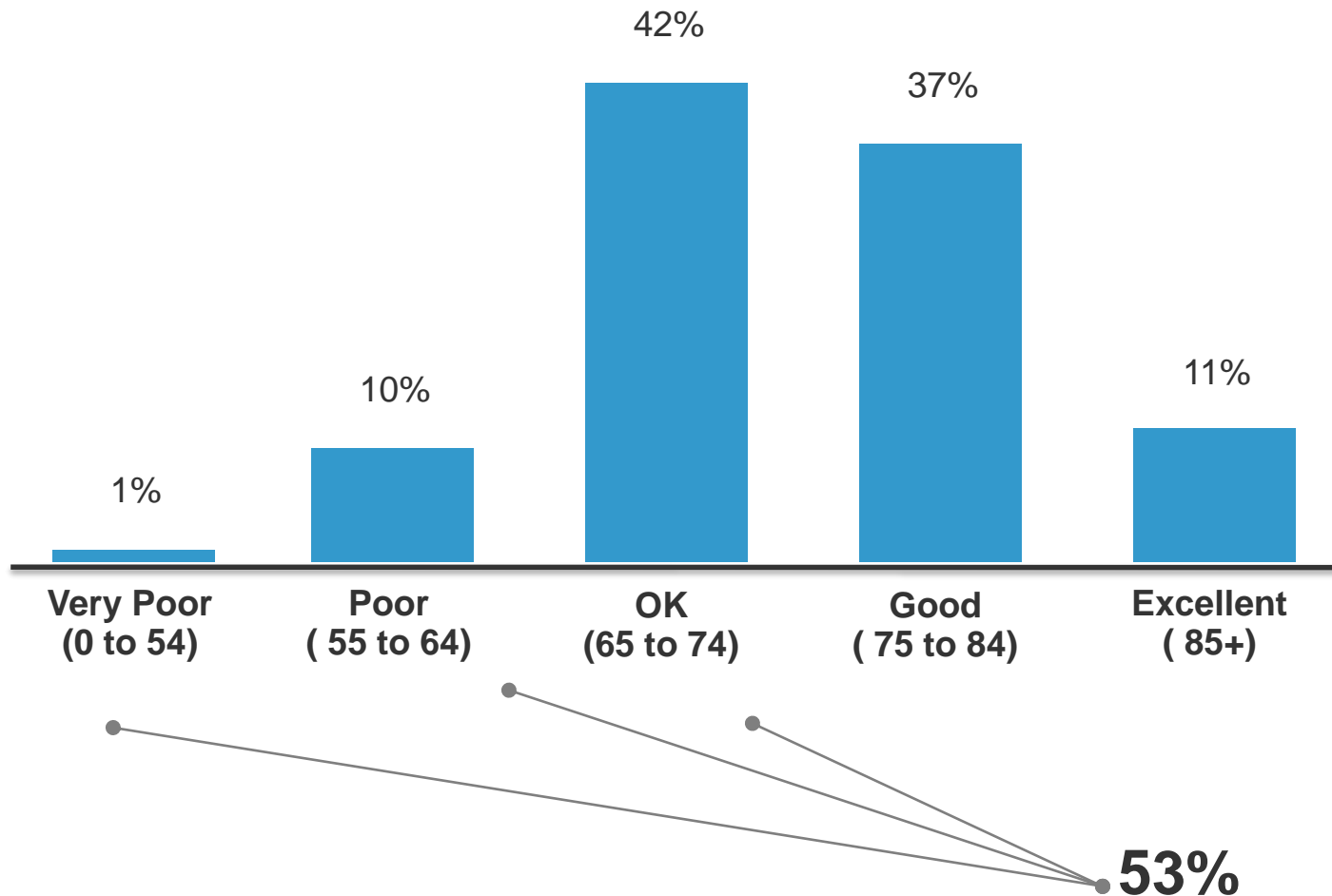
Boosting customer engagement via proactive outbound notifications

**Art Schoeller – VP & Principal Analyst
Forrester Research**

We have entered the “age of the customer”



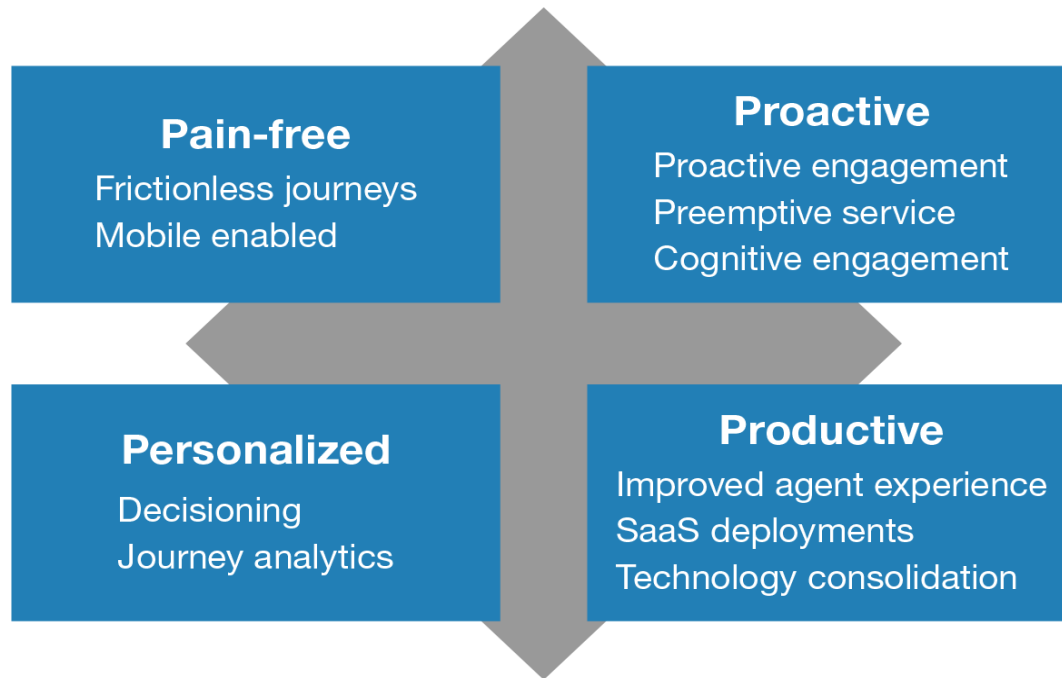
Few companies deliver an outstanding experience



Source: January 21, 2014, "The Customer Experience Index, 2014" Forrester report

Top Customer Service Trends For 2015

Trends 2015: The Future Of Customer Service



What is Proactive Customer Service?

Outbound communication to customers with timely, personalized information via their preferred channel—phone, text (SMS), email, or social

“Waiting for your customers to contact you and only servicing them when they do is unproductive, unpredictable, and creates issues with managing resources through peaks and troughs of traffic. Instead, proactive outbound communications offer you the opportunity to keep customers productively informed.”

*Alex Black, CTO
Enghouse Systems*



Customers expect effortless service



**55% will abandon
online purchases if
they can't find a
quick answer**



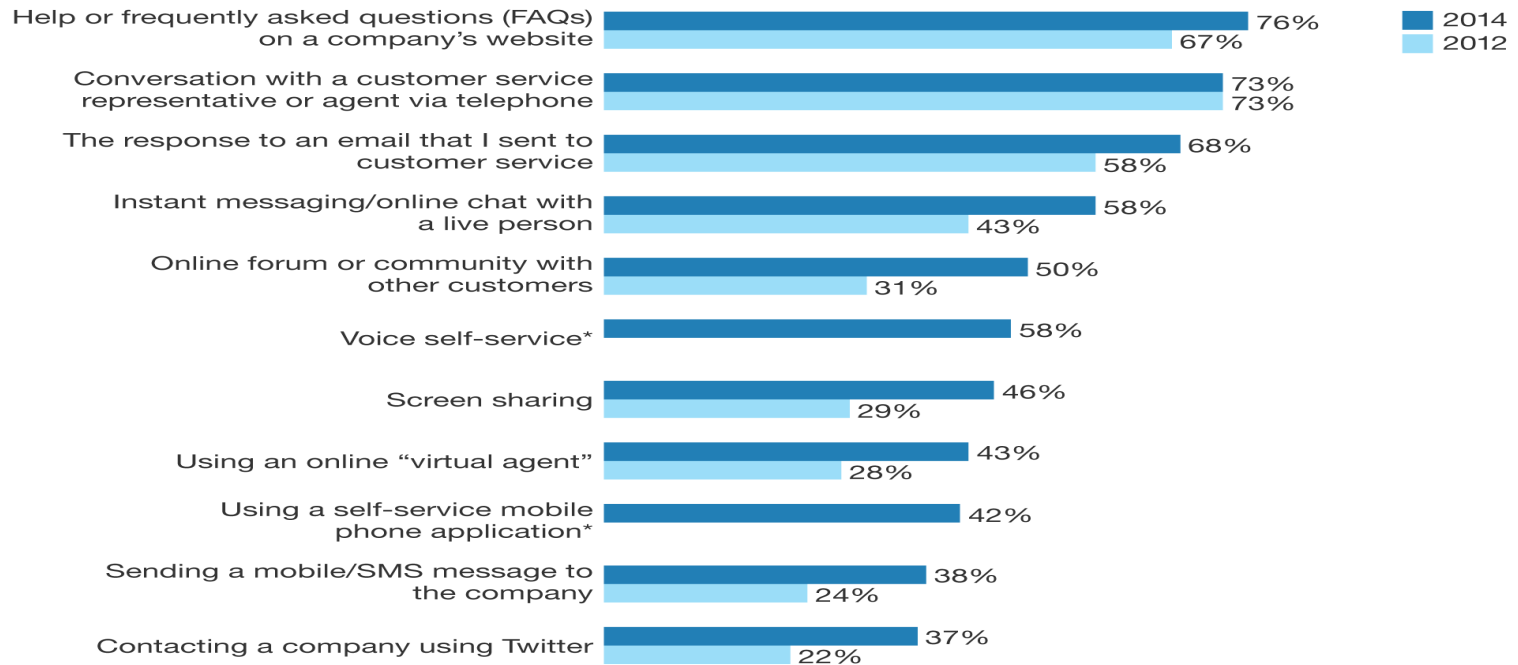
**For 77%, valuing their
time is the most
important thing a
company can do to
provide good service**

Source: January 2015, "Channel Management Core To Your Customer Service Strategy"

Consumer Adoption Of Communication Channels Has Noticeably Changed In Two Years

Channel Management: Core To Your Customer Service Strategy

Percentage of US online adults who have used the following customer service channels in the past 12 months



Base: 4,509 to 7,411 US Online Adults (18+) who have used the specified customer service in the past 12 months (multiple responses accepted)

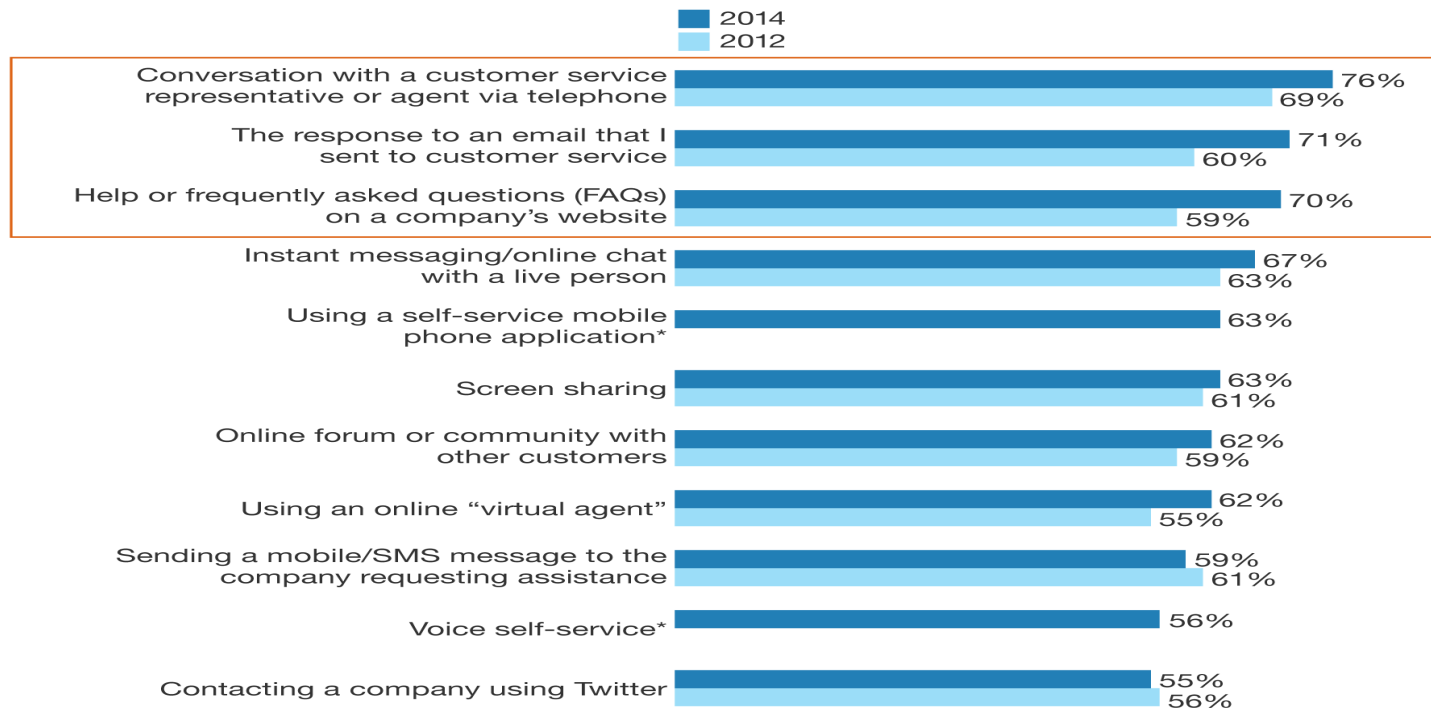
Source: Forrester's North American Technographics® Customer Experience Online Survey, Q4 2012 (US); Forrester's North American Consumer Technographics Customer Life Cycle Survey 2, 2014

*Denotes categories where data is only available for 2014

Satisfaction Is Still Highest For Traditional Channels, But Not By Much

Channel Management: Core To Your Customer Service Strategy

Percentage of US online adults who have adopted and reported satisfaction with the following customer service channels in the past 12 months
(4 or 5 on a scale of 1 [extremely dissatisfied] to 5 [extremely satisfied])



Base: 1,620 to 5,374 US online adults (18+) who have used the specific customer service in the past 12 months

Source: Forrester's North American Technographics® Customer Experience Online Survey, Q4 2012 (US); Forrester's North American Consumer Technographics Customer Life Cycle Survey 2, 2014

*Denotes channel for which data is only available in 2014

Typical Savings For Proactive Communication Services

Savings on carrier costs

- Decreased number of calls
- Fewer incoming lines
- Reduced long-distance charges

Lower costs for agents

- Fewer agents
- Lower overhead & training
- Lower recruitment costs

Less infrastructure

- Fewer space requirements
- Fewer support staff
- Support for green initiatives

Outbound Opportunities

Calling on Accounts

- Revenue retention
- Loyalty call
- Welcome campaigns

Outbound Sales

- Telemarketing up-sell / cross-sell opportunities
- Contract & warranty renewals
- Fundraising

Right-Party Connect Campaigns

- Common in Healthcare, Insurance and early stage collections
- Service Desk Follow-up

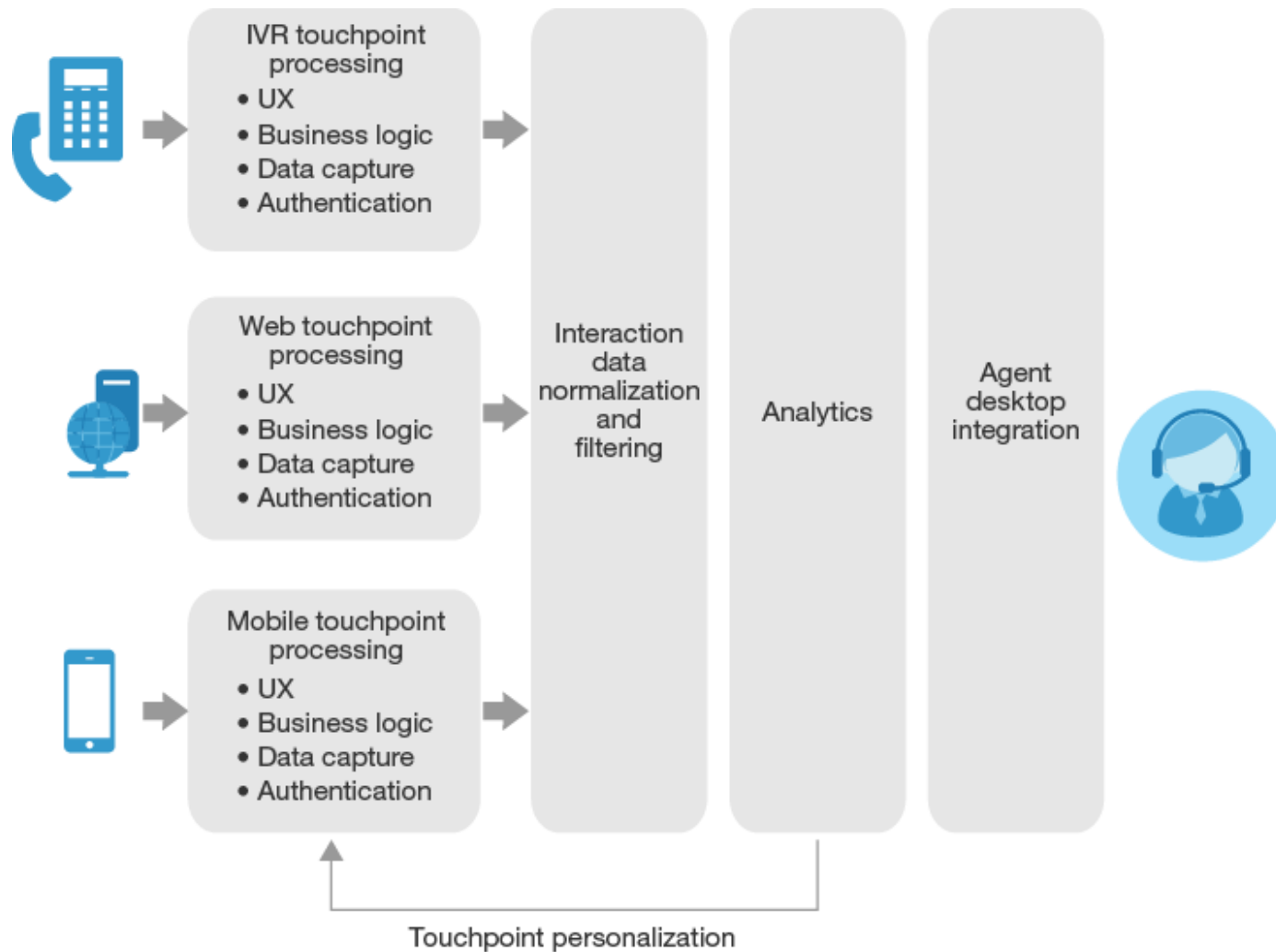
Message Delivery Campaigns

- Account status
- Fraud detection
- Payment alerts
- Appointment reminders
- Emergency / outage / closing notification
- Prescription refill reminders
- Sales & promotion alerts
- Warranty expiration alerts
- Outbound surveys

Proactive outbound – key architectural tenants

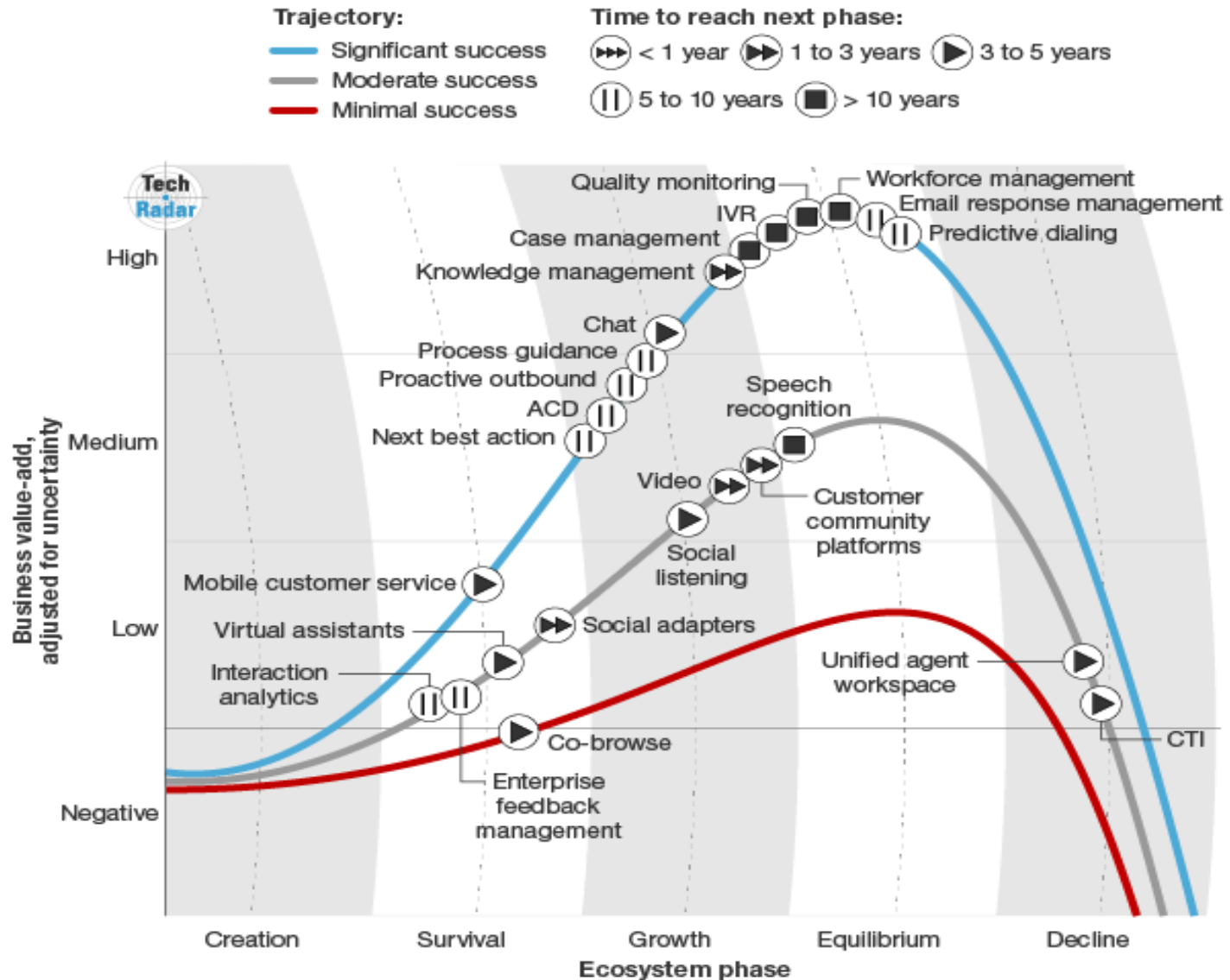
- › Customer preference portal (channel, event, time of day)
- › Business rules - anticipatory versus reactive
- › Integration to event source(s)
- › Integration to all channels (e.g. text, email, voice)
- › Ability to connect the outbound to inbound, including personalization and contextual data
- › Caution about marketing / spamming vs service

Key Attributes for a Cross-Channel Integration Architecture



Source: February 2014 “Connect The Dots Between Customer Self-Service And Contact Centers”

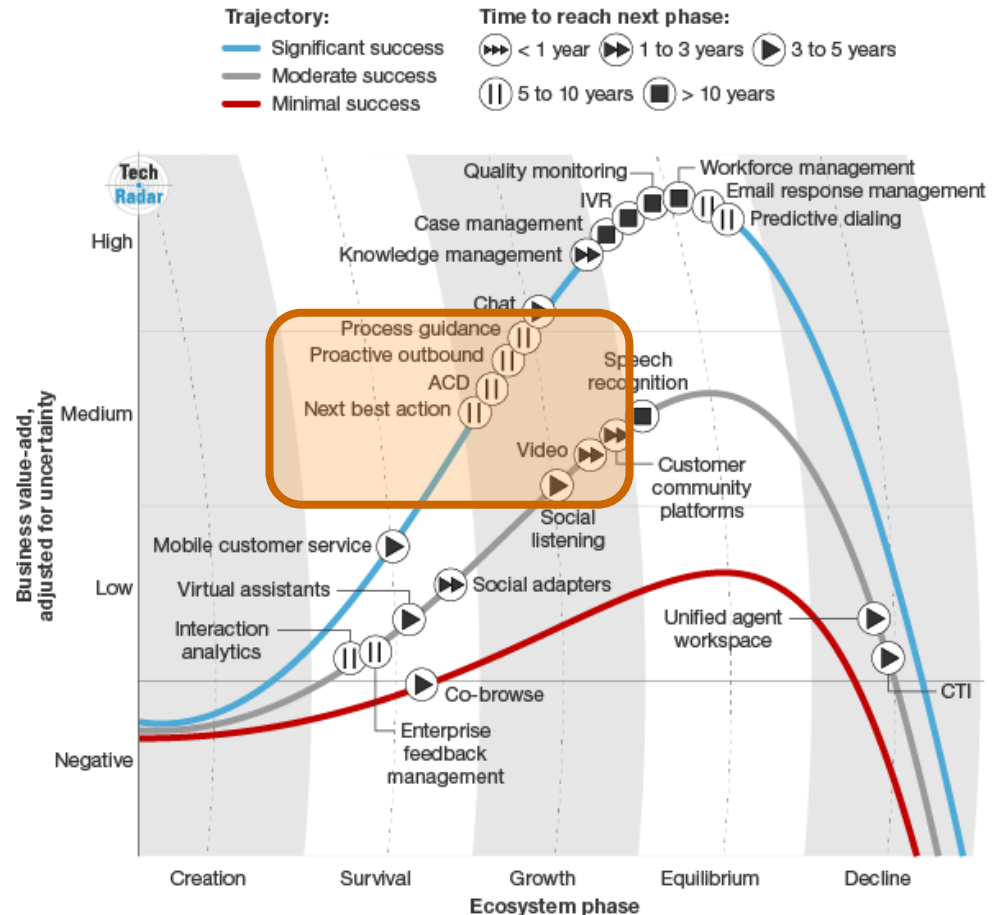
Contact Center TechRadar™



Source: TechRadar

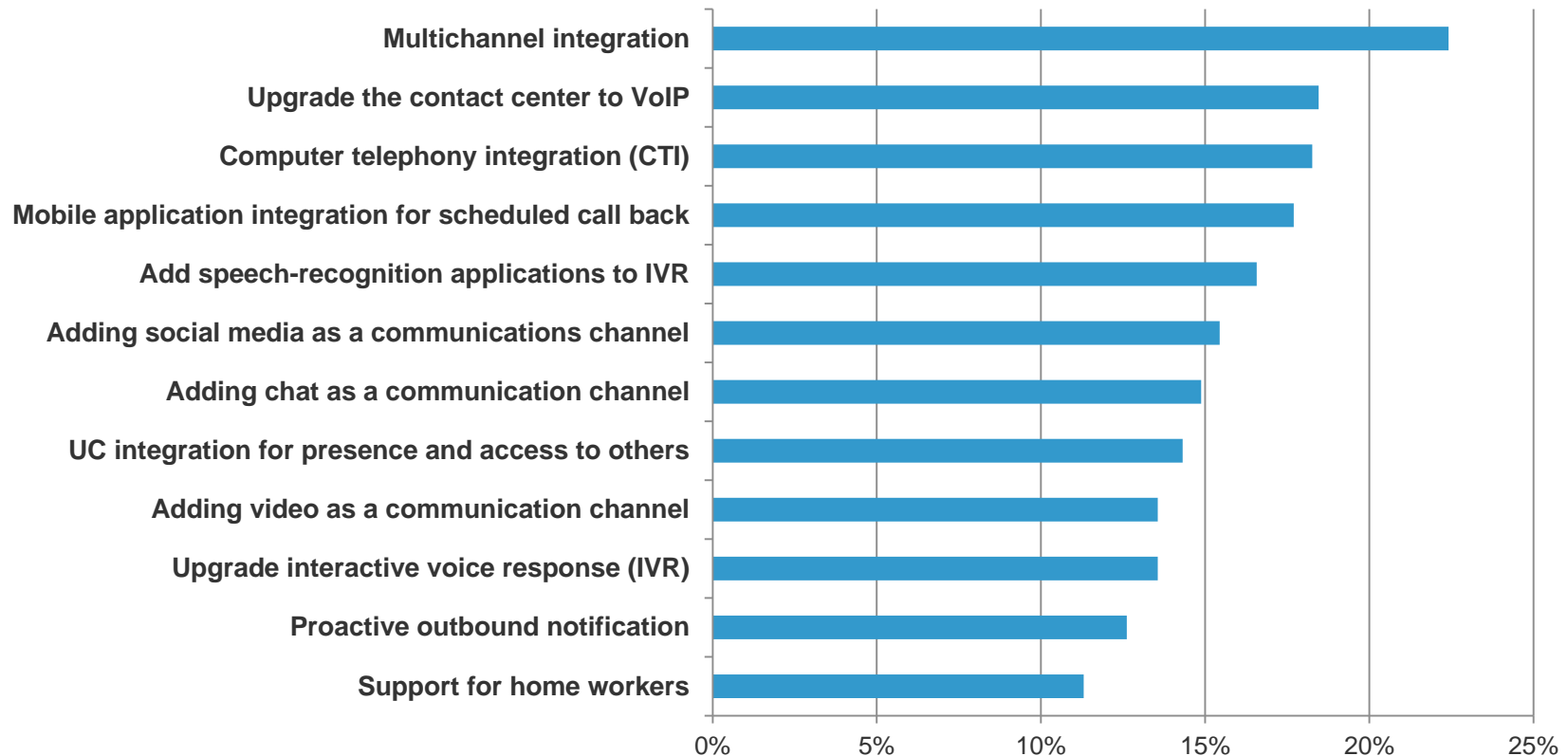
Digital channels grow in importance

- › Attention to **chat** and **mobile** grows
- › **Proactive outbound** are increasingly leveraged over new channels
- › **Knowledge management** fuels consistent service
- › **ACD** technologies standardize queuing and routing
- › **What it means:** Adopt best practices, explore modern ACDs and start the dialog with marketing



Upgrade priorities

Which of the following are the highest priority queuing and routing upgrades for your firm when planning to implement for your contact center(s)?



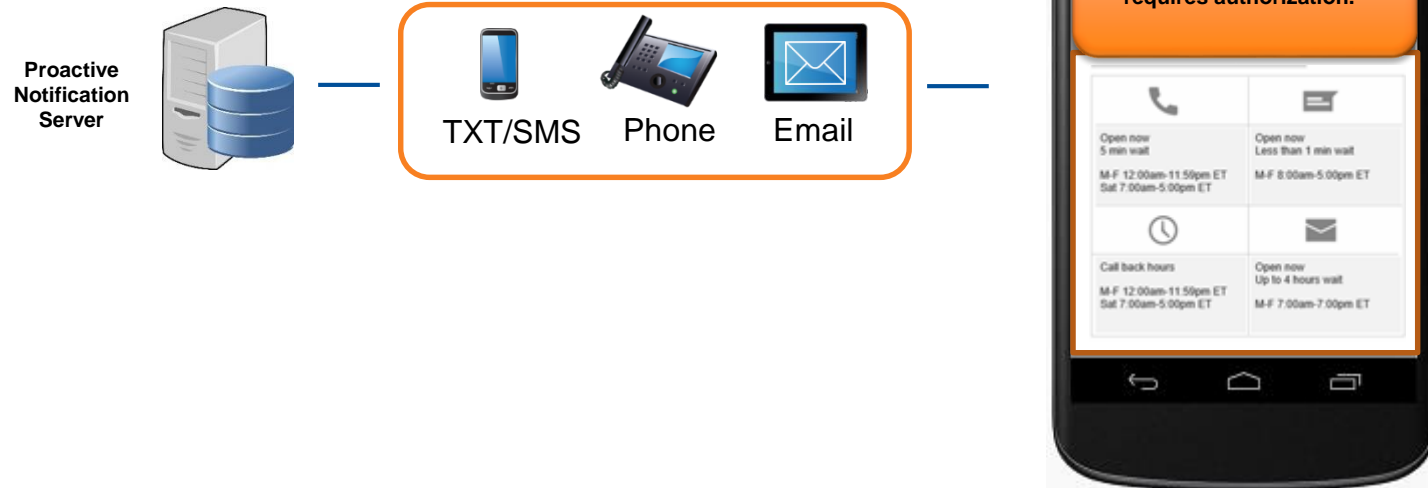
Base: 531 contact center decision-makers with 20+ employees and 50+ seat contact center

Source: Forrsights Networks And Telecommunications Survey, Q1 2015

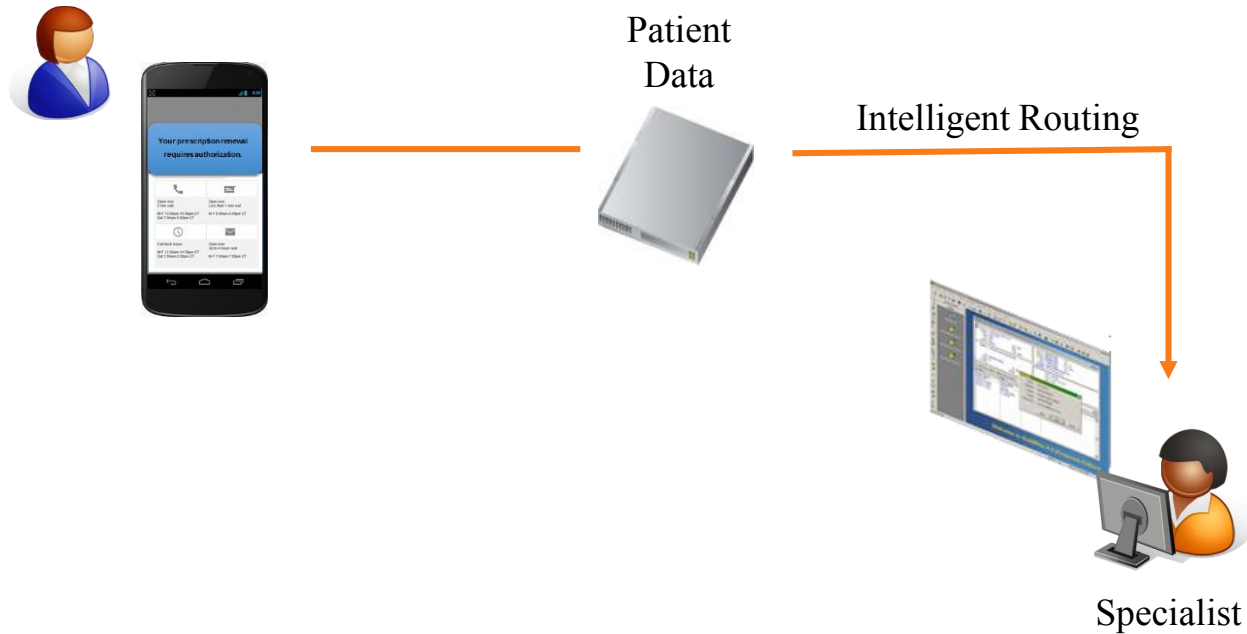
Best practices

- › Coordinate all source of customer communications
- › Assess current architecture and capabilities
- › Engage suppliers who can advise on industry specific communications
- › Always, always err on the side of customer preferences
- › Link outbound to inbound
- › POC should have a solid baseline of KPI's to weigh against
- › Keep on top of performance with solid analytics, including customer feedback

A Basic Notification Use Case



A Basic Notification Use Case



Methods of Good Proactive Communication

- Automated or Agent-Delivered
- Voice Call, SMS, Email, Social Media, etc.
- Allow agents to initiate contact via any channel from a universal queue
- Access the entire Customer Journey and view all interactions—past, present, or future—regardless of channel



Customer Contact

Self-Service

- Online FAQ/Knowledge Management
- IVR – DTMF or Voice self-service
- Mobile Applications

Contact routing to agent

- High value customer
- Upsell services
- Service escalation
- Self-service failure

PENNY >>>>

CRM

Customer information

- Customer Value
- Transaction history
- Contact history
- Contact preference

Service Levels

Contact Channels



Agent Interaction

Proactive Customer Engagement

- Outbound notifications
- Outbound customer surveys
- Outbound dialling campaigns

Customer Satisfaction

Understanding the Customer Experience

- Cradle-to-grave view of customer interactions
- Targeted customer satisfaction surveys
- Quality Management of agents and interactions

Management & Reporting

- Real-time metrics & change
- Adherence to scheduling
- Performance management
- Call Recording
- Scorecard & Evaluation
- Speech analytics
- Historical reporting

HI, PENNY, I SEE YOU WERE TRYING TO FIND INFORMATION ABOUT...

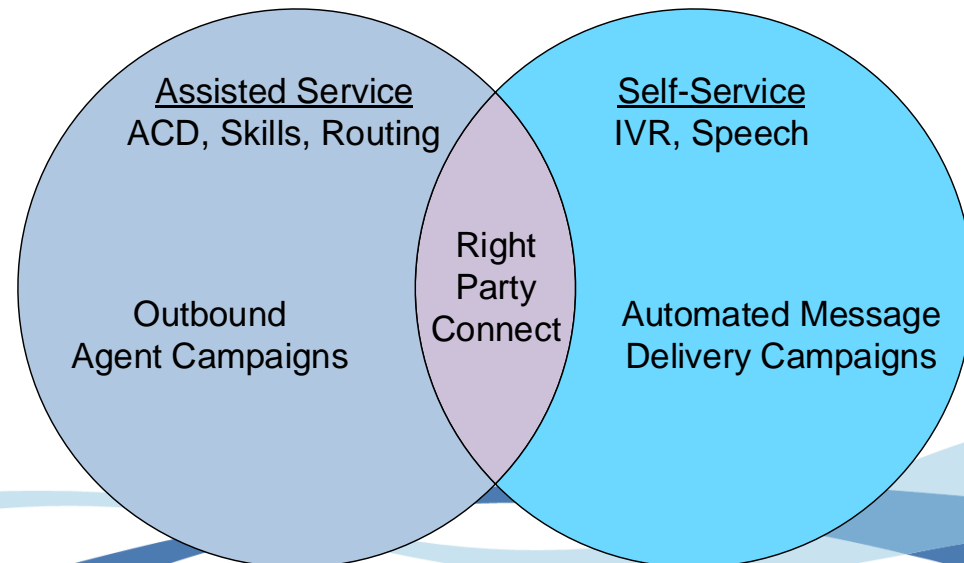
Blending

Inbound / Outbound

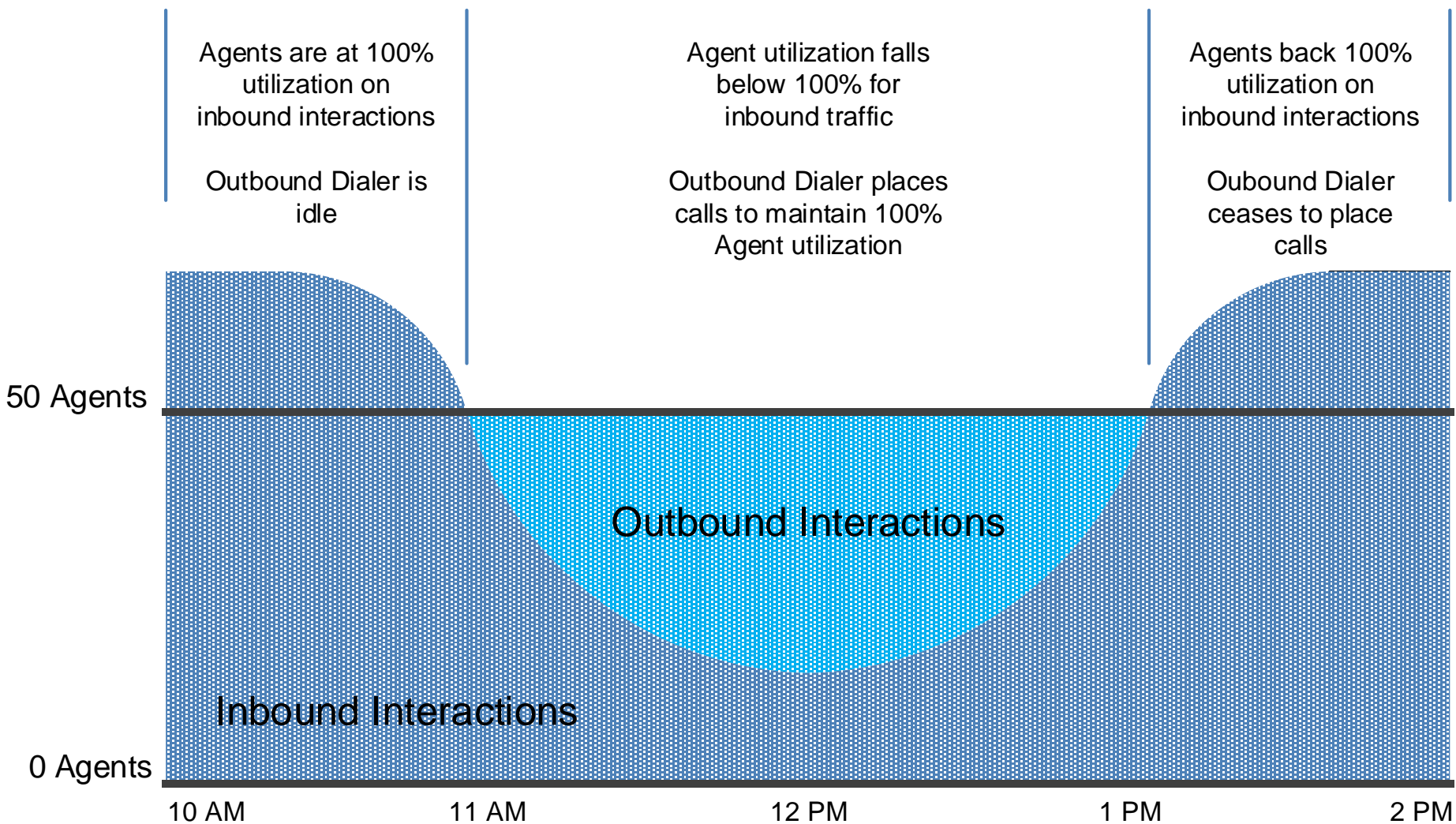
- Blended agent campaigns—inbound to outbound—to maximize success
- Outbound dialing modes: preview, progressive, power, and predictive dialing
- Multi-channel ACD, agent skills, workflow routing, queuing and distribution for campaign list management and automated outbound dialing

IVR / Voice Self-Service for Outbound Dialing:

- Agentless automated outbound message campaigns
- In / Out Voice, SMS, and Email
- Option to connect with Agent



Blending – Agent Campaigns



Compliance Peace of Mind

Compliance-Capable Tools

- Integration to national Do-Not-Call (DNC) lists
 - Internal DNC to track contact opt-out/opt-in
 - Configurable predictive algorithm and reporting to manage abandon call rates
 - Caller-ID transmission
 - Call Disclosure
 - Locale/Time Zone awareness
 - Call recording via Enghouse Interactive QMS
-
- Cell Phone Scrubbing
 - Manual-Only Dialing Platform



Cell Phone Compliance

TCPA regulations

- Detect and remove cell phone numbers for predictive/power dialing lists
- Provide a manual-only dialing platform
- One call opportunity to gain knowledge of reassignment

How to Adhere

- Check each phone number against the most current data available before it's dialed
- Exclude cell phone numbers and/or any other numbers you indicate
- Ability to “opt-in” individual numbers ok to dial once consent is given
- Employ Call Recording to catch new subscriber info, etc.



Right-Party Contact

Definition: Validation that the correct party has been contacted

- Leveraged in environments where a party needs to be identified before providing personal information
- 20-30 seconds of agent time is usually spent for right-party validation



Benefits of Proactive Outbound

- Enhance agent productivity – take advantage of low inbound volume
- Deliver lower costs by streamlining campaign management
- Enable compliance
- Boost customer satisfaction by being proactive instead of reactive to customer needs
- Personalize customer interactions

QA