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”

1900 Age of manufacturing
Mass manufacturing makes industrial powerhouses successful
- Ford
- Boeing
- GE
- RCA

1960 Age of distribution
Global connections and transportation systems make distribution key
- Wal-Mart
- Toyota
- P&amp;G
- UPS

1990 Age of information
Connected PCs and supply chains mean those that control information flow dominate
- Amazon
- Google
- Comcast
- Capital One

2010 Age of the customer
Empowered buyers demand a new level of customer obsession
- Macy's
- Salesforce.com
- USAA
- Amazon
Few companies deliver an outstanding experience

- Very Poor (0 to 54): 1%
- Poor (55 to 64): 10%
- OK (65 to 74): 42%
- Good (75 to 84): 37%
- Excellent (85+): 11%

Top Customer Service Trends For 2015

Trends 2015: The Future Of Customer Service

- **Pain-free**
  - Frictionless journeys
  - Mobile enabled

- **Proactive**
  - Proactive engagement
  - Preemptive service
  - Cognitive engagement

- **Personalized**
  - Decisioning
  - Journey analytics

- **Productive**
  - Improved agent experience
  - SaaS deployments
  - Technology consolidation

Source: Forrester Research, Inc. Unauthorized reproduction or distribution prohibited.
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

- Help or frequently asked questions (FAQs) on a company’s website: 76% in 2014, 67% in 2012
- Conversation with a customer service representative or agent via telephone: 73% in 2014, 73% in 2012
- The response to an email that I sent to customer service: 58% in 2014, 68% in 2012
- Instant messaging/online chat with a live person: 43% in 2014, 58% in 2012
- Online forum or community with other customers: 31% in 2014, 50% in 2012
- Voice self-service*: 58% in 2014
- Screen sharing: 29% in 2014, 46% in 2012
- Using an online “virtual agent”: 28% in 2014, 43% in 2012
- Using a self-service mobile phone application*: 42% in 2014
- Sending a mobile/SMS message to the company: 24% in 2014, 38% in 2012
- Contacting a company using Twitter: 22% in 2014, 37% in 2012

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)

*Denotes categories where data is only available for 2014

Source: Forrester Research, Inc. Unauthorized reproduction or distribution prohibited.
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])

- Conversation with a customer service representative or agent via telephone: 76% (2014) vs 69% (2012)
- The response to an email that I sent to customer service: 71% (2014) vs 60% (2012)
- Help or frequently asked questions (FAQs) on a company’s website: 70% (2014) vs 59% (2012)
- Instant messaging/online chat with a live person: 67% (2014) vs 63% (2012)
- Using a self-service mobile phone application*: 63% (both years)
- Screen sharing: 63% (2014) vs 61% (2012)
- Online forum or community with other customers: 62% (2014) vs 59% (2012)
- Using an online “virtual agent”: 62% (2014) vs 55% (2012)
- Sending a mobile/SMS message to the company requesting assistance: 59% (2014) vs 61% (2012)
- Voice self-service*: 56% (both years)
- Contacting a company using Twitter: 55% (2014) vs 56% (2012)

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


*Denotes channel for which data is only available in 2014
Typical Savings For Proactive Communication Services

<table>
<thead>
<tr>
<th>Savings on carrier costs</th>
<th>Lower costs for agents</th>
<th>Less infrastructure</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Decreased number of calls</td>
<td>• Fewer agents</td>
<td>• Fewer space requirements</td>
</tr>
<tr>
<td>• Fewer incoming lines</td>
<td>• Lower overhead &amp; training</td>
<td>• Fewer support staff</td>
</tr>
<tr>
<td>• Reduced long-distance charges</td>
<td>• Lower recruitment costs</td>
<td>• Support for green initiatives</td>
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</tbody>
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Outbound Opportunities

**Calling on Accounts**
- Revenue retention
- Loyalty call
- Welcome campaigns

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

**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

**Right-Party Connect Campaigns**
- Common in Healthcare, Insurance and early stage collections
- Service Desk Follow-up
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

IVR touchpoint processing
- UX
- Business logic
- Data capture
- Authentication

Web touchpoint processing
- UX
- Business logic
- Data capture
- Authentication

Interaction data normalization and filtering

Analytics

Agent desktop integration

Mobile touchpoint processing
- UX
- Business logic
- Data capture
- Authentication

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)?

- Multichannel integration
- Upgrade the contact center to VoIP
- Computer telephony integration (CTI)
- Mobile application integration for scheduled call back
- Add speech-recognition applications to IVR
- Adding social media as a communications channel
- Adding chat as a communication channel
- UC integration for presence and access to others
- Adding video as a communication channel
- Upgrade interactive voice response (IVR)
- Proactive outbound notification
- Support for home workers

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

Proactive Notification Server

TXT/SMS  Phone  Email

Your prescription renewal requires authorization.
A Basic Notification Use Case

Patient Data

Intelligent Routing

Specialist
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

Self-Service & IVR

Agent Assistance

CRM

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

Contact Channels

Proactive Customer Engagement
- Outbound notifications
- Outbound customer surveys
- Outbound dialling campaigns

Customer Experience

Measurement & Reporting

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

Enghouse Interactive

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

Agents are at 100% utilization on inbound interactions
Outbound Dialer is idle

Agent utilization falls below 100% for inbound traffic
Outbound Dialer places calls to maintain 100% Agent utilization

Agents back 100% utilization on inbound interactions
Outbound Dialer ceases to place calls

50 Agents

Inbound Interactions
Outbound Interactions

0 Agents

10 AM 11 AM 12 PM 1 PM 2 PM
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