The Contact Center of the Future Paper

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Customer Schism or Customer Vision?
What should and shouldn’t be in the contact center of the future.

“Schism” means disunion or discord. Many companies often seem determined to push their customers away from them via bad service, chaotic treatment, and frustrating processes, creating a customer schism that creates attrition, disloyalty and customer detractors from the company.

Leading companies know that a strong and smart customer vision is required to improve experiences, create new modes of interaction, and ultimately create an energetic base of loyal customer advocates. These visions manifest themselves in new strategies, new technologies, refined processes, and superior execution at the front line.

In this paper we’ll illustrate the good and bad, the old and new, the dark and light – customer schisms and customer visions. See which side your operation falls closer to, and think about where you’d like it to be.

I. Jack and the ScreenTalk

Wanting to keep in touch with his college-bound son, Jack bought a new fully set-up PC from a major manufacturer with a built-in, bundled video conferencing package – marketed together as ScreenTalk (it’s actually a co-branded partnership between a PC maker, the video hardware seller, and an online service). Upon getting it home and set-up, he had a terrible time getting the unit to function properly. Already frustrated, Jack calls the 800 number to get some help.

Customer schism: Jack becomes an angry detractor

This is what happens to Jack and the ScreenTalk partnership:
• Jack navigates through three layers of IVR prompts before he dead-ends with nothing that sounds right. So he hammers on the 0, the #, and the * key until the IVR informs him that he can speak to a representative.
• It’s a high-traffic time at the call center. Jack is placed on hold for 10 minutes. He fumes at burning cell phone minutes.
• Calls are sent to a demand queue and default with the billing department. The first rep hears Jack’s problem and transfers him to tech support.
After another wait, Jack explains his problem to tech support, who opens a ticket but soon realizes it’s a problem with the packaged video camera. Jack is given a separate 800 number to call.

After another call, another set of IVR prompts, and another wait on hold, the video camera partner center asks Jack to repeat the problem. The agent recommends calling the first 800 number again or checking the website.

After Jack refuses to call the first number, the video camera agent transfers Jack to the call center manager who instructs Jack to take the package back to the store where he bought it as it must be defective.

Jack spends his evening building a new website entitled “ScreenTalksux.com”, which attracts over 2,000 posts in its first day.

Customer Vision: Jack becomes an advocate

Just like before, Jack calls frustrated with his purchase, but this time much different events take place:
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<th>Capabilities and Technology</th>
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<td><strong>1. Jack calls and is authenticated by voice</strong></td>
<td>Authentication occurs by analyzing Jack’s voice (he already had an account from the Internet provider, that’s where he got the first offer). There’s no need for logins or passwords.</td>
<td>Voice print analysis Authentication occurs using voice print analysis, so there is no need for account numbers and passwords</td>
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<tr>
<td><strong>2. Natural language interface provides answers</strong></td>
<td>ScreenTalk’s service line uses a natural language voice interface and asks Jack to state his reasons for calling. Jack says “technical problem – software”, and he’s presented with a self service speech dialogue which captures key elements of information required to help solve the problem. (This information would be impossible to capture through a touch-tone phone, but Jack doesn’t think about that). Jack also doesn’t think about how his queue time is used more effectively and seamlessly, he’s happy he’s making progress. Jack also isn’t aware that the speech system can capture more information before a transfer, and in many cases can answer his questions without ever going to a live agent. Throughout this call, Jack is never asked to repeat anything. Again, a person only notices that when they are asked over and over again.</td>
<td>Speech Recognition Speech Recognition is further used to capture certain pieces of information which enable the agent to focus on core problem-solving skills (high value) versus commodity data capture skills. This has enabled the company to remove its first-line support function at considerable savings to them.</td>
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</table>
| 3. System senses its time to talk to an agent | The first several recommendations for fixing the device seem on target, but Jack's all thumbs with “techno gizmos”. The speech system recognizes that Jack has a “level 2 frustration” based on tone of his voice, it routes him to technical support after capturing the core information. Waiting time for tech support is always under two minutes (and always is at ScreenTalk). While waiting, he is given a proactive but brief status on recent account highlights (account balance, technical updates). | **Customer wait time**
Customer wait time is managed by advanced work force management and call forecasting, which refines call forecasts every 15 minutes and adjusts staffing level. This is achieved by paging in new agents or releasing agents through flexible buy-back strategies. Wait time is also managed by customer priority, which is scored using customer value, vulnerability (which is based on detailed customer scoring) and tone of voice. An integrated and global staffing pool allows for acceptable service levels at any time, day or night. Proactive presentment of current status/account highlights:
Relevant information such as billing balance, open orders etc. is provided based upon analysis of the current call and makes wait times more productive for the customer. |
|---|---|---|
| 4. The agent is prepped through Knowledge Management system | At the call center, an advanced knowledge management system analyzes the voice exchange and proactively provides instruction and content to the agent. Before the agent has even finished introducing herself, the knowledge management system has provided recommendations and links to troubleshooting content. | **Skills based routing**
Skills based routing is used to align available agent skills around the globe with customer needs and preferences based on the type of transaction being undertaken. **Offshoring**
Calls can be fielded anywhere by competent agents who use accent neutralization to build acceptance. **Knowledge Management system**
The Knowledge Management system has progressed from a stand-alone system that agents type in queries, to a system which is integrated into the process and is engaged based on the spoken exchange that is happening real time. Speech systems analyze the exchange and feeds lookups to the KM system on a real time basis. Options then present themselves on the desktop as a constantly updated list for selection by the agent. |
| 5. A remote diagnostic is performed over the web | In addition to talking through the problem in a way Jack can understand, the agent also runs a diagnostic on Jack’s PC over the internet, which helps her isolate the problem. | **Cross-channel integration**
Capabilities across channels are linked, enabling agents to work with clients online, on the phone, and through devices seamlessly. |
| 6. Agent solves problem and recommends “next best action” | The agent identifies a workable solution and guides Jack thorough the process to resolve the issue. On the agent’s desktop is an offer management system that suggests the ‘next best action’ as a product offer, personalized for Jack and the context of the interaction. The agent is able to offer Jack additional memory for the computer, which answers some of Jack’s earlier concerns about slow video speed. Jack finds the sale helpful and contextually appropriate. | **Retention and sophisticated cross-sell marketing**
Retention and sophisticated cross-sell marketing create personalized offers based on detailed analysis of customer trend information, demographics, behavioral information, and other indicators. Advanced analytics review customers’ entire portfolio and transaction history before making the offer. Data is as current as 60 seconds ago. |
### 7. Automated analysis and follow-up calls.

| Behind the scenes, an auto-survey analyzes the exchange based on voice tone, stress level, and other indicators and provides a CSAT score and QAM results for management. Several days after the call Jack is pleased to receive a follow-up message from the agent who had helped him to confirm that the problem has been fixed and to see if there was anything else he needed help with. A training “genie” adjusts the agent’s training curriculum based on her performance during the call. Overall, Jack is delighted with the experience despite originally being frustrated with the package he bought. Jack’s attitude towards ScreenTalk improves and he recommends it to other fathers he knows who have kids in college. |
| Customer satisfaction Customer satisfaction is measured without the need for an intrusive survey. Advanced voice analytics scores the interaction based on the pitch, tone, and stress level of the customer. The analysis includes a QAM component which reviews the adherence to measures of quality without the need for human observation. Genie base training agents Genie base training agents keep track of knowledge delivered, measures performance, and adjusts training plan based on results and new products/content to be added. Tracking and management Tracking and management of follow-ups are used to improve the customer experience and present a proactive and responsive face to the company. Follow-ups are also used to monitor and reverse any dissatisfaction that was left within the previous transaction. |

### Looking “behind the scenes”

Today, the contact center is viewed largely as a cost center. It handles the greatest proportion of client contacts (80%+), but as these scenarios demonstrate it can define a company as uncaring, unresponsive, and cruel, or spin the company towards helpful, proactive, and impressive. A single interaction can make or break a relationship, and the typical call center operation may have thousands of these events each day.

Within the next 10 years, we expect to see a maturing of customer contact capabilities and the enablement of new technologies and approaches that will greatly simplify the nature of customer interactions and improve the precision and personalization of the experience. Imagine where improved global telecommunications and supporting applications seamlessly move agents on and off-line in a precision dance to meet call volumes. Imagine the detailed matching of individual agent skills with call requirements to handle each request beautifully – all thanks to proactive, automated force and load managers. Imagine a new customer vision for call centers.
In the customer vision, call centers are smaller because more staff work from home, high speed data connections are available everywhere, and dynamic work forces are used. Agents’ skill levels achieve an ideal level due to virtual training agents on the desktop which adjust their information delivery approach based on call volume, call mix, and handle times. Struggling agents are given more training, leaders are promoted to work on more challenging calls. The training genie on each desktop is a virtual skills manager, coaching each employee to build success for themselves, the company, and the customer.

II. Assurance of Insurance? How Jen Invests her Time
After getting an enticing offer in the mail, Jennifer decides to purchase a new investment-style insurance policy (similar to whole life). After searching on Nsure Insurance’s website, she can’t find a product or an offer that matches the offer she remembers receiving in the mail. She’s frustrated trying to find terms, minimums, investment options, and beneficiary schedules.

Customer Schism: Jennifer won’t even take the time to tell you she’s angry
• She finally sorts out what she thinks is the right policy features and enters them into the online form.
• After almost completing the application, she returns to a previous page to correct her entry, but receives a ‘load error’ and the previously entered order disappears.
• Jen searches for the contact center phone number, which is hard to find, and makes the call.
• Irritated by irrelevant IVR options for existing customers, she presses zero to speak to an agent.
The agent has no access to the web because it is company policy in its centers. The agent can only present options again one by one.

- The application is re-keyed by the Agent over the phone.
- The agent explains that the pricing is contingent on her meeting with a broker and cannot even provide a ballpark of the fees or benefits.
- Jen is asked if she would stay on the line for a customer satisfaction survey. “Forget this” she says. She would have given them a poor score – but she can’t stand to talk to them for another minute.

Customer Vision: Jen Signs ON

Just like before, Jennifer has trouble with all the options. This time she gets the help she needs.

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| 1. Virtual Agent pops on the scene | Jen presses the ‘contact us’ button on the side of the screen and a virtual agent window opens up with a direct connection to an online Nsure agent (video). Jen explains her problem. | VoIP-enabled website
Voice over Internet Protocol-enabled website links directly to universal queue.
Skills-based routing
The ‘contact me’ button is linked to the content the customer was searching on that page. Skills-based routing delivers the customer to the correct agent who knew about different investment products. |
2. Interactive chat helps find the problem

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<th><strong>Jen mentions an insurance product that the agent doesn’t recognize. He asks her to type in the name of the package in a text chat session that is automatically created when the direct video connection was established. Jen types in the product, which the agent recognized as one from a competitor.</strong></th>
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<tr>
<td><strong>Web conferencing</strong></td>
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<td>One-way video conferencing can project either the agent or an avatar. Online chat is available to facilitate live conversation.</td>
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3. KM research finds competitor’s offering

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<th><strong>The Agent explains to Jen that the product mentioned is from a competitor but he’s sure Nsure has one that is “even better”. The agent uses his Knowledge Management system to quickly identify the features and premiums of the competitor’s package and is able to bring up a comparable product that Nsure offers.</strong></th>
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<tr>
<td><strong>Knowledge Management system</strong></td>
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<tr>
<td>Knowledge management is used to keep agents informed of competitive offerings and enable them to research and understand products quickly and effectively.</td>
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4. Agent finds a better offer with his company

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<th><strong>In both the interest of helping Jen and making sure she doesn’t stray to the competitor, the agent remotely directs her web browser to the relevant web site for the Nsure investment product. Jen is pleased with the policy (and the fact that she can stop insurance shopping). The agent is able to customize the product using collaboration technology to push updated changes to her “real-time” to show her different benefit amounts, investment schedules and terms.</strong></th>
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<td><strong>Web collaboration</strong></td>
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<td>The agent is able to manipulate the user’s browser, send custom pages to the user, and help users fill-out forms. This type of interaction creates a ‘hand-holding’ experience where the customer is less likely to be frustrated or lost.</td>
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5. Application happens quickly in real-time online

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<th><strong>To sweeten the deal, the Agent is able to present a multi-product discount if she wishes to move her auto insurance. This was prompted to him via his dashboard. Jen finds the offer perfect. The agent pushes an application page to Jen who completes it immediately and ‘posts’ it back to the agent. The agent spots a minor mistake, updates the form, and sends back one final review to Jen to confirm and to append an electronic signature (to prevent fraud at the agent’s end).</strong></th>
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<td><strong>Personalized offers</strong></td>
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<td>Based on the context of the interaction, and in other cases, demographics, behavior, customer history and other customer data, the agent is prompted through their systems with customized offers for each customer which are presented at the right time during the interaction.</td>
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6. A time is set to finalize with agent house call

| **6. A time is set to finalize with agent house call** | The agent then thanks Jen for the order and directs her to a web page where they are able to agree upon and schedule a two-hour window for an agent to come by with detailed paper work to sign. The agent asks if anything else is required and promises to e-mail her the interaction record and his direct extension if she needs any help. |
| **Web collaboration** | The agent is able to manipulate the user's browser, send custom pages to the user, and help users fill-out forms. This type of interaction creates a 'hand-holding' experience where the customer is less likely to be frustrated or lost. |

7. Jennifer can already customize her preferences

| **7. Jennifer can already customize her preferences** | At the completion of the application, Jen is presented with an easy to read ‘summary statement’ which estimates her expected premiums, fees, and schedules. The web site asks for her contact preferences and introduces her to the finance education and tools section of her account, where she can learn about different investment options and model a sample portfolio. |
| **Integrated experiences** | Sales and service are integrated into the larger customer experience. In this example, product features were delivered right at the end of the sales transaction. |

**Looking “behind the scenes”**

This scenario shows how sometimes “a call” is the last thing a call center should be doing. By being able to communicate and collaborate on the web, the call agent is able to maintain the channel of the customer’s choice, present information interactively, and maintain the customer’s attention before they can explore competitive options.

To enable this, companies must be able to combine new technologies with a new attitude towards how their agents (and the company itself) decides to interact with customers. Today’s customer interacts on multiple channels – they research online, shop at the store, perform service on the phone, bank at the supermarket, and get alerts through their devices. Companies who are able to meet them and keep pace with them will end up being the best to do business with.
III. The Countdown

Emergency! Tom dropped his cell phone and it broke. He needs a new one pronto - he’s catching a flight for business that afternoon and is swamped writing a proposal. His wife, Carrie, is already out in the car running errands with their daughter. All Carrie has to do is quickly shop for a phone while driving, pick it up at the store, and drop it off at Tom’s office within the next two hours. Can it be done?

Perhaps the question should be “Can it be done RIGHT”. It’s been two years since they’ve signed up for their first plan, so it’s a good time to reconfigure their plan. Carrie knows that whatever plan she picks will be theirs for at least a year. Plus, it’s a good time to look into a new family plan since their daughter is old enough to get a new phone.

The company that can meet Carrie’s needs will make the most of an emergency and win a life-long customer. If they fail, Tom’s trip will be impaired, an afternoon will be wasted, and Carrie will likely shop elsewhere for new phones for the family.

Customer schism: Too Late for Tom

- Already on the road, Carrie calls their cell phone company, CP-Mobile, to get a new phone.
- She has to pull the car over to get through the IVR prompts as she can’t safely drive and select keypad options simultaneously.
- Upon getting to an agent, she explains her problem. The agent says she’ll try to help.
• Even though Carrie and Tom both use CP-Mobile, the agent can’t combine both of their accounts. They’ll need to cancel their plans and create new ones.
• The agent also has trouble describing the phones and features over the line. There are too many options between models, pricing plans, features, etc.
• Despite taking both Tom’s and Carrie’s detailed account information and going half-way through the sales process, the agent recommends that Carrie go to a nearby retail location. She’s already wasted 25 minutes on the phone!
• Carrie has trouble taking down the driving instructions and gets lost. It takes her an additional 20 minutes to find the store.
• At the store, the clerk explains that the model of phones for her desired plan are out of stock. She can pick another plan or she can go to their other location. She doesn’t want to be stuck with the wrong plan or the wrong phone and heads out.
• The other location is across town – nearly 40 minutes away.
• As she rolls into the parking lot, Tom calls her from the office. It’s too late. He has to catch his flight. It is going to be a rough trip without a mobile phone. He’s already missed four calls from clients.
• Carrie returns to her car deflated. She’s failed her husband. She didn’t get to her errands. She wasted an afternoon. Her daughter had to miss her ballet lessons. Although Carrie hasn’t decided which cell phone company she’ll eventually use, she definitely knows that it won’t be CP-Mobile.
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| 1. Carrie researches family mobile plans | As Carrie drives towards town she uses hands-free Bluetooth to call the CP-Mobile service center. Using natural language she interacts with the center via a voice portal. The system identifies and authenticates Carrie based on her voice print and dynamically assembles menu choices based on customers previous interactions and preferences. She is able to quickly shop for options while driving. | Voice print authentication  
Authentication and identification of customer based on automatic scan of voice print. |
| 2. During lunch, Carrie beams options to Tom from her phone | Carrie and her daughter stop to pick up some sandwiches to go. While her daughter orders the food, Carrie requests that CP-Mobile (the center) e-mail a few options over to Tom for review. She's able to send detailed plan options and 3-D images of the phone models using voice commands. | Pervasive computing  
Advanced phone devices will be used for browsing and interactivity.  
Advanced natural language speech  
Advanced natural language speech will allow customers to speak freely without constraints on grammars or menu selections that are required today. |
| 3. Tom signs up and finishes order online | Tom finds the plan that he thinks would work best for the family. The system puts together a custom package for his family including all new phones and recommending some cool upgrades, including a fun, MP3-equipped phone for his daughter.  
His account information is pre-populated so ordering is a snap. He indicates that he needs a rush pick-up. He's able to schedule a pick-up at nearby location.  
With a few clicks, he's able to send GPS driving directions from the CP-Mobile site to Carrie's car. | Multi-channel integration/Integrated customer history  
Storing customer interactions across channels and making the history available across channels, with most recent interaction added every few minutes. Product interest, channel preferences and other data is used to create a better experience and targeted offers.  
Integrated offer management  
Real, practical, personalized offers to existing/new customers which leverage all we know about the customer |
| 4. The phones are preprogrammed and ready to go | A clerk at the retail location calls Carrie back to let her know the phones are ready to go. It's only been about 15 minutes. The clerk asks Carrie if she needs directions. "No thanks" Carrie says, she's already pulling into the parking lot. When they arrive at the store, their phones are waiting for them and are preprogrammed with their information. Since they have time, Carrie and her daughter decide to buy a headset, a cool carrying case, and a gift card for an online MP3 store. | Supply chain integration  
Timely inventory information to support the customer experience. In this example, the ‘center’ knew the inventory of the store.  
GPS functionality and integration  
Enabling the ability to use GPS functionality in mobile devices and download information such as locations for mapping of directions. |
| 5. The family drives to the airport together. Tom makes his flight. | Carrie arrives at Tom’s office well before he has to catch his flight. They decide to share a ride to the airport together so they can eat their sandwiches and enjoy each other’s company before Tom takes off. Tom is amazed that they made it. Carrie thinks “no sweat!” During the ride, Carrie is called by the call center to see if they are happy with their new service. They’re delighted. | **Proactive Service**
Follow-ups, reminders, thank yous, and other outbound contacts provide an opportunity to build relationships and find dissatisfaction before it becomes a deal-breaking event. |

**Looking “behind the scenes”**

In the future contact center environment, communications will continue to become more integrated with the way we live and work. Rather than arranging a call or contact around a desk, or other physical location, our devices will travel with us and more and more customer interactions will occur on the go. It will allow us to integrate what we want and how to get it. The role of the contact center and the modes of interaction will continue to advance and become more integrated with the way we live our lives.

Higher degrees of integration in capabilities across the organization will be required to improve the customer experience and meet customer expectations. In this scenario we describe the customer buying process, order placement, and delivery while the customer is moving from place to place.
**IV. Stan and the Business Plan**

Stan is the office manager of a mid-sized company which is growing rapidly. Stan realizes that he is quickly outgrowing his current telecom plan which includes a complex array of telephone lines, 800 numbers, equipment leases, internet access, networking services, and other bundled services. He’s been adding lines, services, bandwidth, new equipment and call time to his plan as he’s needed it. Plus, the business has had to open and close locations quite often to deal with their growth. He’s been too busy to even think about how much he was paying, it was just important to focus on growth.

Stan takes a moment to look over his telecom charges through Calltec’s website. As he reviews his plans and the fees, he realizes that they are paying way too much.

- Stan begins looking at plans and options. He was hoping for a little more help in planning his business, but then he never seems to get much help. He is able to hobble together a plan online, but the site requires that he calls the sales center to get pricing.
- Stan calls the center and is asked to enter his account number by the VRU. Despite this, the agent still asks for the account number after a long hold time. Stan describes his current situation and growth needs to the agent. After the explanation, the agent informs Stan that this is the consumer center and transfers Stan over to the business center.
- After entering his account number and waiting on hold again, he finally gets to repeat his story to the business agent.
• After hearing the story, the business agent thinks it would best for Stan to talk to the business billing center, and he's transferred again.
• The agent agrees with Stan, he's got a perfectly awful plan that doesn't suit his business at all and is probably costing him an arm and a leg. Stan wasn't happy before, but now he almost feels the company knew they were taking advantage of him.
• The agent tries to push a bundle that would save Stan a little money, but the package has parts that Stan doesn’t need and doesn’t address his company's need to be flexible down the road. The agent applies unwanted pressure on Stan (after all, the agent's commission is riding on it).
• Stan refers the agent to a bundle he's seen online. The agent doesn't know about it.
• Stan is also interested in making changes to locations on file (e.g., cancellations, moves).
• The agent finally asks Stan to repeat his needs again so the agent can write them down on a scrap of paper. The agent also takes down the location changes. The agent takes Stan's number and promised to call back with a quote. The agent will also look into the offers Calltec is making online.
• Two weeks go by and no one calls. Stan picks up the phone again, dreading the interaction with Calltec which will surely be a repeat of his first time.

**B2B Customer Vision: Fast lane to a happier business customer**

In this scenario, Stan still finds himself reviewing his uniform leasing and supply plan for his rapidly growing company, but this time Calltec is ready.
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<td><strong>1. Stan is able to configure his package and his business spend</strong></td>
<td>Stan reviews current account and usage information on Calltec's web site. Their web site has an advanced product recommender that continuously analyzes customer usage and allows the customer to enter growth plans. The Recommender shows Stan how to optimize his company's current spend and make best use of their dollars, account for growth and understand projected spend going forward. Stan is pleased with the personalized plan which also calls out competitor options and a few alternatives. While online, Stan updates store locations and changes, which automatically generate change requests at Calltec.</td>
<td>Advanced product configuration and recommendation Software-based configurators take into account the entire scope of products and match them with detailed customer information. Dynamic business analytics Analytics happen in real-time within the system (not later in batch or performed off-line by an analyst) to change the behavior of software, communications and business process as its needed.</td>
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<td><strong>2. The company segment changes and an account exec is notified.</strong></td>
<td>Inside Calltec, the growth plans entered by Stan indicates that the company should be moved from a small company classification, to a medium (high growth) segment. Calltec’s business analytics applications detect the changes, and automatically revise the segmentation, treatment, and account handling structure. New skills are assigned to the account. New routing and agent pools are assigned to care for the account, given its potential. A premise sales rep is automatically assigned and receives notification of the account status and key executives/ contacts. He immediately begins to set appointments to go over and see the customer.</td>
<td>Real time segmentation and treatment adjustments The company is able to change how it recognizes and then treats a customer based on their segment. Automatic, real-time account support model adjustments As segments change, how they are supported changes as well. Customers migrate to different service provision models (such as self-serve to account rep) as their relationship changes with the company.</td>
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<td><strong>3. A workflow process gathers approvals over multiple channels</strong></td>
<td>Because the changes require review and authorization from a number of key account roles within Stan's business, a work-flow management process is automatically enabled, which builds the decision process and initiates contacts to the individuals in the customer side with approval authority. The CFO and the VP or Operations automatically receive a note about pending account changes to their preferred devices (one via Blackberry, the other via e-mail) and are able to quickly authorize the changes. The system tracks the status of these approvals, sending follow-up communications as necessary, and then advances the process to the next stage, once approvals are received.</td>
<td><strong>Automatic work flow management for approvals</strong></td>
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<td><strong>4. Stan and his colleagues discuss the plans with the agent</strong></td>
<td>Stan reviews the options with the other decision makers within the company who agree with the bundle, but they would like to make two modifications. Stan and his colleagues conference the 800 number and are routed to an agent. They don’t realize it, but they are automatically routed to an agent who serves the medium business segment key account pool and who is also located off-shore. Accent neutralization and translation capabilities make the exchange simple, efficient and accurate. Prior to receiving the call, the agent receives a profile on Stan’s company and the details of the pending order, including the pending location changes. The agent is informed of the recent treatment change, and understands that this is a high potential account.</td>
<td><strong>Skills based routing</strong></td>
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5. A technician is brought on to discuss some customization

Stan describes the bundle he is interested in with the two modifications he requires. The agents advanced Knowledge Management capabilities integrated into the desktop and the CTI, automatically provides links to content that could be useful for the conversation. Reviewing the rules on the bundle Stan is requesting, the agent sees that modifications require engineering involvement and verification. The agent pulls a technician representative into the call. The technician sees the account growth potential, and sees that this customer could benefit from a T1 connection versus using a large number of individual DSL lines for business. The technician initiates a collaboration session and works out the specific changes with the customer and creates an initial price quote. Meanwhile the Agent has validated that bundle pricing can be offered with this package of services. Stan and the team are happy with the quote and the agent converts the quote to an order (with only a few mouse clicks) and starts the provisioning and billing process.

6. Within an hour, Stan receives a notification that their new plan is active.

Within an hour, Stan receives an order confirmation and a welcome package that contains all the details he needs to feel comfortable with what was purchased. Also included in that package is a note confirming the account changes that were requested. A note from the VP of Sales soon follows, providing a personal contact number and advising the customer what an important customer they are.

Looking “behind the scenes”

Business-to-business customers are often the last ones to receive advanced capabilities in the call center. It often makes sense since there are typically fewer of them, and their higher account value usually justifies account managers. Also, automation is usually reserved for the less-profitable masses. The problem with this reality is that B2B clients build their expectations through their experiences
with the entire commercial world. They are growing to expect interactions that can happen online and over the phone. They are looking for tools and ways to make their interactions easier. They understand their value, and expect treatment in accord.

Business-to-Business customers have a need for support that is based on moderate to very complex transactions and inquiries. As the number of products increases, and the lines between company-owned support and third party support blur, there is an increasingly complex customer interaction that needs to be managed. Given this situation, the agent is increasingly reliant on good systems and automation capabilities to meet increasing customer and company expectations. In many ways, this may double-burden companies serving the business world, they will have to maintain much of their account manager treatment levels while also raising the sophistication of their online and self-service options. Sophisticated companies will find the right balance, often through further segmenting their customer base and building a better understanding of their customers’ true expectations.

V. Autobiography of a Car Shopper

Mark has had two leases with his car company over the past six years. He’s coming up to the point where it’s time to get a new one. The new Letango is out and the Letango marketing team has smartly decided to reach out to Mark to make a catch. These two scenarios become a tale of two databases: in both stories, Letango has identified Mark as a hot prospect, but how they execute is wildly different.

Customer Schism: Institutionalized Forgetfulness Kills the Deal
• Targeted by marketing in a ‘coming off-lease’ campaign they conducted through their data service bureau and marketing agency, Mark receives a new car brochure in the mail and is somewhat interested.

• A few days later he browses the web site to take a closer look at the car specifications, various quality surveys, and car rating information.

• That weekend, Mark stops at a dealer booth at the mall to take a look at the car. The attendant insists on getting Mark’s name and address, but can’t (or refuses to) explain why they need it. Mark knows – “a salesman is going to call me later” he thinks. He gives the attendant the information. After all, he does need a new car.

• The next week, Mark visits the dealership to test drive the car. He’s pretty jazzed about the model and might be close to ‘pulling the trigger’.

• The dealer insists that Mark give his name and address so he can follow up. Mark tells the dealer that he’s already in the database. The dealer laughs “not in our database you aren’t!” How can this be? Not only did he give the information at the booth last weekend, he’s been a customer for years.

• Later that month, Mark gets a call from Latengo marketing with a special lease offer that national is providing. It’s also the one they’ve been advertising on television. Mark is very interested and wants to discuss some of the options he discussed with the dealer. Despite the number of contacts, and that Mark has leased two cars previously from the auto manufacturer, the tele-agent has no specific information about Mark and refers him back to a dealer.

• Mark figures the only way he can get through this is to figure it out with the dealer. The dealer has little recognition of their previous visit, his past interactions at the mall, the web and over the phone, and has to look through file folders to find his previous lease. The dealer begins his sales pitch from the absolute beginning and begins the ‘hard sell’ that has defined the long-clichéed archetype of the sleazy auto salesman.

• Exhausted and disgusted with the process, Mark can’t remember why he felt loyal to the Letango brand for the past two leases. Perhaps its time to check out some other car brands.
Customer vision: Mark buys a car

In this scenario, Letango Motorcars still has Mark in their ‘coming off lease’ campaign, but this time their information is coordinated from the beginning to the end, and they are able to retain, analyze and use that information to improve their sales process, create a better experience for Mark, and create a new sale while expending less time and resources.

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<thead>
<tr>
<th>Customer Vision</th>
<th>The Experience</th>
<th>Capabilities and Technology</th>
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</table>
| 1. Mark receives the custom e-brochure | Letango uses their knowledge about Mark to create a custom brochure that's personalized to him based on his sales and ownership history. Due to householding and other demographic information available on Mark, Letango is aware of his growing family and has incorporated a suspected need for a larger car into the offer. The brochure is sent via e-mail and there is an invitation to a personalized web portal where Mark can take a virtual test drive. The electronic brochure also tells him nearby locations of where the car can be seen over the next few weeks. | Customer-centric offers
Highly personalized offers are based on effective analysis of all history and profile information, including purchase history, interaction history, preference information, demographics, psychographics, and analysis performed on like customers. |
| 2. Data-enabled marketing refines an offer | He visits the web portal and is impressed with the car and his ability to check it out virtually. The Letango portal offers personalized price quote for a lease, which is based on his financial profile as an ongoing customer. Because of his loyalty and good credit standing, Letango is making a special lease package available to him, which is lower than the nationally advertised price. | Personalized web portals, created at the individual customer level Fully articulated mini-websites are dynamically created to create a unique and customized experience for each customer. |
| 3. Mark gets additional sales help from online agent | Mark has some additional questions on the car’s warranty and wants to have a different lease structure priced out. He decides to speak to an agent while on the web site by clicking the “call me now” button. Immediately, a window appears with a virtual assistant that listens to his request. The virtual assistant is able to answer the warranty question, but hands over to a live agent for the pricing question. Mark has a camera mounted on his PC that is enabled in the dialog. The virtual agent can associate Mark’s lip movements to his speech, substantially improving the agent’s ability to ‘read’ his request. Letango has created a profile on Mark based on all prior interactions. This indicates that Mark is serious about making a purchase within the next 2-3 months. The live agent thanks Mark for being a loyal customer and asks how his experience has been with his last two cars. There is a warranty repair that is available for Mark’s existing car and they schedule the appointment right there. The agent then discusses the changes Mark is interested on the lease terms. The agent is able to use all of the options and features Mark has stored online and provides a price quote, which is valid for 60 days. | Virtual assistants Intelligent, automated online assistants are able to interact with customers in a natural and intuitive way, providing an interface that is able to respond to customer inquiries as if they were having a real conversation. Visual Validation of Utterances By combining visual analysis of lip movements with Speech applications, automation systems are able to improve the accuracy of spoken input. “Call me” connection to a live agent Customers are always provided options to talk to a live agent during self-serve interactions to ensure no customer is lost to frustration. Live agent connections are easy and seamless for the customer. |
4. **The dealer is ready for Mark’s visit**

Feeling like he’s already made great strides in buying the new car, Mark visits a dealer the next day. The dealer greets the customer and quickly accesses the customer’s interaction history and preferences. After thanking him for being a loyal customer, and acknowledging the active ‘offer’, a test drive is quickly arranged.

**Multi-channel integration**

Interactions are able to begin in one locus and finish in another without interruption in workflow and with complete transfer and continuance of information.

5. **Sale!**

There are no big surprises with the test drive. After all, Mark has been driving Letangos for the past six years. Happy with the vehicle itself, Mark decides to accept the offer. There is no pre-qualification process or negotiation. All of that was already taken care of with the auto manufacturer pre-screening, offer presentment, and the previous interaction with the live agent.

**Simplified shopping and purchase processes**

Mundane or difficult shopping processes are streamlined to both ease the customer through the transaction and to reduce the labor and mistake potential among sales employees.

6. **Multi-channel follow-up happens within a day**

Within 24 hours, Mark receives a welcome package from Letango – both by email and through the mail. The package includes details of the preferred customer program. He also receives a thank you note and a series of offers from the dealer for ongoing maintenance of the automobile. Each of these notes references the other communications, and are personalized to Mark’s purchase and profile, right down to the graphics showing his exact car.

**Contextual cross-sell and up-sell**

Companies recognize and capitalize on appropriate moments to sell additional products and services and extend the customer relationship.

7. **Mark happily conducts online survey and refers his friends**

Within 48 hours Mark receives a satisfaction survey by email that he can complete hands-free with verbal responses. The system also measures the customer’s spoken tones and incorporates this into the survey results. Mark tells the survey that he is very pleased with the car and the sales process and acknowledges that he has already provided two referrals for the same car to a neighbor and a work colleague.

**Tonal recognition**

Sophisticated sound analysis technology is used to dig deeper to find new insights into recorded customer dialog. Otherwise invisible emotive factors (such as anger, delight, or frustration) can be discovered, analyzed, and acted upon.
Looking ‘behind the scenes’
The improvement of the understanding and management of customer relationships is a key component of customer contact management. Managing customer contacts across channels and providing a deep understanding of past interactions and history is critical to deepening customer relationships. Closed loop marketing, which incorporates deep business analytics and highly personalized offers is a foundational element of managing customer contacts.

With all of these capabilities, keeping track of the customer’s interactions requires companies to keep track of and integrate customer data across the entire scope of the sales cycle. When the information loop falls apart, the customer can become frustrated and the company loses its dialog. When it all connects, the company stands to improve its dialog with the customer, making for more sales performed more efficiently.

VI. A Day in the Life of a Call Center Manager
Dan is the call center manager for a busy, multi-site, internationally staffed call center operation. Each day presents its own mix of problems – capacity management, staffing problems, resource management, outages, new programs from marketing and sales, and others. How does Dan spend his typically day at the office? Imagine two realities, one where Dan struggles with his operations and one where he excels at his business.

Call Center Schism: A Day in the Life of Dan
1. Dan reviews the havoc from the previous day.
Dan arrives at his desk to start the day. He starts by looking through the stacks of manually created reports and updates to understand the current center performance and issues, as reported by the overnight shift. During his review, he is interrupted by a panic call that service levels have fallen due to too many calls in the West location indicating a long wait time and frustrated customers.

2. Increase capacity! The Force/Load Group takes to the phone.
Dan hurries to the force/load desk to understand situation and is briefed by the manager who is frantically trying to understand the source of the problem. The force/load group begins making calls to staff to ask them to start their shifts earlier. This process takes several hours to increase capacity and redirect calls to the East centers.

3. Executive leadership needs answers now!
When Dan returns to his desk he receives requests for current performance metrics from the COO who is angry and irritated. The COO was awoken this morning by their very angry CEO who had just seen Lou Dobbs break a story about growing public concerns about declining levels of customer service and had used their company as the poster child for the problem. Worse yet, the CEO and COO have an analyst meeting that day. Dan calls a panicked ‘all hands’ alert to his management staff. They are to drop whatever they are doing and help generate a report. Dan spends most of the day manually creating bar graphs.

4. Fallen trees and loss of power take out a center.
Talk about timing! A tree falls on a main power line to a key center and the location goes dark. Someone forgot to fuel up the generator after the last storm. With 50% of agent capacity concentrated in this center, service levels plunge. The West center is already over capacity and the East center is now offline. An hour later, East is backed up and overflow calls are begin to flow to the center.

Agents in the East, taking calls from the West, are unaware that a huge mail drop from marketing hit, creating huge spikes in inbound calls for a product that most of them have yet to be trained in. Many agents can’t find product details to take orders. Many customers are calling for products not yet available. Dan starts frantically calling marketing for information. Customers claim false advertising and hang up in disgust. Is it worse that sales are lost or customers are angry? Dan can’t think about it now, he’s already behind schedule on the emergency CEO report and he hasn’t even been able to look at last night’s call reports.
Call Center Vision: A Day in the Life of Dan

Now imagine the same scenario, but Dan has the tools, processes and organization that enable him deal with problems effectively and excel at his business.

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<th>Customer Vision</th>
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| 1. Dan reviews the previous day on his way to work. | Dan is getting ready to leave home and receives automatic center status on his PDA. Key metrics and performance highlights are headlined in clear graphics generated by the automated dashboard installed in his office. He recites a few comments for the COO that are automatically attached to a note and forwarded to his device. | Contact center dashboard
Comprehensive and automated view of center operations are available real-time from multiple devices, including mobile. |
2. Key metrics and status data is on Dan's dashboard.

Dan arrives at the office and reviews the contact center dashboard which highlights key metrics and status information. Peak load had been experienced in the West location earlier this morning so the system automatically redirected calls to the East location with capacity and initiates a sequence to proactively page agents to adjust start times and increase the number of reps available. Additional overflow capabilities were available at other global locations. Agents have been identified down to individual skill levels, ensuring the contact center can route calls to the best available agent. Since off-shore centers are also scored in this manner, bringing additional capacity on-line for overflow can be done without a significant impact on customer experiences. This is all bolstered by advanced Knowledge Management and training which allows agents to learn during customer calls via proactive, contextual learning.

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<tr>
<th>Automatic/Intelligent work force management</th>
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<td>Applications are linked to dashboards to detect force/load problems and initiate fixes automatically (load balance, increase agent pool, adjust schedules etc).</td>
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3. Dan isolates problems and solves them.

Dan looks at an overall visual map of call flows and sees a few ‘hot spots’ where load and handle times appear long. By clicking on these parts of the call flow Dan is able to drill down to details, down to the level of actually listening to an active customer call, watching the systems interactions, and automatic quality scoring as the call progresses. He is able to isolate problems to particular combinations of customer segment, call flow stage, product, geography, and other key factors. Dan is able to compare key operating metrics for the ‘home’ center with live metrics (e.g. AHT, Bridge Rate, Close Rate, CSAT etc.) streaming to his dashboard from the centers handling rollover calls.

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<tr>
<th>Offshoring</th>
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<td>Taking advantage of lower labor costs overseas and moving center operations out of the country.</td>
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<td><strong>Advanced knowledge management</strong></td>
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<td>Today’s KM applications are static repositories of information – tomorrow’s KM applications will be pro-active systems that are context sensitive and will proactively provide active lists of potential help/search topics, based on call type, application screen being viewed, customer segment, etc.</td>
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[Virtual centers](#) Linking smaller groups of agents together in ‘virtual’ larger agent pools to take advantage of utilization and occupancy gains.

**Voice Over IP – VOIP**

Using internet protocol based networks to extend the reach and feasibility of existing networks, lower costs, and make more capabilities available to call centers.

**Skills Based Routing**

Identifying agent skills down to individual skill level and using this level of detail to route calls for more effective matching of needs and skills.
4. A power outage is dealt with efficiently. A tree falls on a main power line to a key center but back up power systems comes on-line immediately. Fuel status is measured and managed along with a list of key metrics on center.

5. After a good morning, Dan takes a jog around campus. Call levels are managed and the afternoon seems quiet despite huge amounts of inbound action generated from a marketing campaign. Marketing had long integrated their campaign planning into the call center capacity planning, and the centers were long prepared for the campaign. Dan decides to go for a run on campus, but takes his PDA in case there are any emergencies.

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<th>Table 1</th>
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<tr>
<td><strong>System Integration (CRM, Campaign Management, SFA)</strong></td>
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<tr>
<td>Linking planning systems and processes together to centrally plan business actions, such as campaigns, across the value chain and across inter-departmental functions.</td>
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**Looking “behind the scenes”**

Contact center strategies and structures will continue to mature over the next ten years. Advancements in performance measurement, automated scorecards and reporting, and more sophisticated management processes will drive towards the intelligent center. Center managers will have a comprehensive view of center operations on their fingertips, all the time. Advances in communications and networking technology at reasonable costs will loosen the shackles linking performance to large physical collections of agents and make virtual centers more viable – balancing the desire to work locally or at home with cost and economies of scale.

**Conclusion**

These stories show how companies can turn their customers’ call center experiences into visionary moments that build customer advocacy or into disharmonious ‘schisms’ that drive customers away. As companies begin using new capabilities and technologies, the customers’ expectation will continue to rise as they interact with the best and most sophisticated companies. Changes in one industry will be expected of others. Those that lead the way with innovative and customer-focused call center capabilities – those that adopt a customer vision – will be our success stories of the future.
About IBM Global Business Services and the Contact Center Practice

IBM clients – businesses worldwide, across industries – are today reaping the rewards of a self-sustaining approach to CRM that enables them to accurately assess their strengths and weaknesses, calculate risks, control investments, manage change and set reasonable expectations from the start.

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