Upstream Works

6 Elements of an Omnichannel Management Strategy

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New channels of customer communication are exponentially increasing the complexity of managing the customer's experience, with disastrous results. Companies need to develop a future-proof strategy for providing consistent service regardless of how the customer chooses to connect. This paper provides the core elements to be considered for any successful omnichannel customer experience management strategy.

ABOUT THE AUTHOR

Rob McDougall, President and Co-founder of Upstream Works has been a catalyst for change within the Contact Center industry for many years. To ensure that Upstream Works continues to be a leader of innovation, Rob plays an active role in promoting the company through corporate evangelism, articles, and various speaking engagements. Rob is the author of many of Upstream Works' white papers and is an Electrical Engineer.

INTRODUCTION

Trends in customer service are very clear. Analyst after analyst consistently places a multichannel strategy among the top ten initiatives that should be focused on in the coming year. Though the terminology used varies - with various analysts reviewing multichannel, cross-channel, transverse channel and the latest term "omnichannel" – they all consistently talk about the importance of being able to service any customer with a consistent context and with consistent service capabilities across any channel.

Providing great and consistent service across channels should be the least expensive, best and most profitable option for a business.

Focusing on the outcomes that the business is trying to achieve accentuates the similarities of servicing the customer's need, and minimizes the inherent technological differences relating to the channel used. This delivers results that are meaningful to both the customer and to the business and allows channels to be added easily, without affecting core systems and processes.

A seamless and consistent customer and agent experience can finally be realized by looking at an open framework that normalizes a customer's contacts, regardless of the channel of origin and regardless of the multiple channels that may be used for the entire interaction.

> **At a glance:**
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> Channel complexity is hurting customers.
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> New channels continue to proliferate.
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> Customers pick their channel of choice and then change it.
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> Adding new channels is increasingly expensive.
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> Focus on meeting the customer's need the first time.
>
> Dont lose information about customers - if they know, you should know.
>
> Dissassociate channel from process.
>
> Eliminate channel silos.

What is a channel?

Channels provide the medium through which your customers can interact with your business. They can interact with sales people or contact center agents (through assisted service); they can also interact with your business systems (such as your IVR or web portal) through self-service. Many businesses are focusing on providing enhanced self-service capabilities to reduce costs and to improve customer service (through high-availability of services).

Assisted service, however, remains the go-to medium for customers who have non-standard or complex requests. And unlike self-service, the number of assisted service channels continues to grow and evolve, and with it, the complexity of providing reliable and consistent service to your customer base.

Assisted service is the most expensive form of customer service and, when looked at across all industries, still accounts for the highest volume of customer interactions in general.

Currently, many organizations support voice, email and chat interactions with multichannel, siloed applications that share no common management or customer experience framework. This impacts customer experience, increases cost, and ultimately negatively impacts your brand in the marketplace.

We consider the following channels when evaluating assisted service.

Social Media

Everyone agrees that Social Media changes one thing in the paradigm of the business – it puts the customer in control of the interaction. Understanding how the customer experience delivered by the contact center is related to the social experience is key to a business understanding how to deal with these interactions.

As a channel, social media represents a variety of different applications, concepts, and business components. But how do you connect and interact with the customer if the social interaction is owned by marketing? Is it understood how you're going to transition that contact into customer service or sales, and when? Is there a consistent approach for measuring and monitoring response times, service levels, etc.? Providing an infrastructure that can deal with these issues and support these interactions as the volumes increase will differentiate the leaders of the future from the rest of the industry.

Instant messaging

SMS (Short Message Service) continues to evolve in the contact center but is still being used primarily as an outbound notification mechanism.

For SMS to work as a contact channel, the SMS messages must be considered as an ongoing conversation. Multiple SMS messages from a single person must be delivered to an agent so that context is retained. Future SMS messages must have a persistent history, so that future agents can still track the overall interaction and context. The customer has the history on their mobile phone; the agent should have access to the same information.

Mobile

Mobile is often talked about as a channel, but it really represents a collection of dissimilar and loosely related elements. Mobile can be a straight web interaction, a mobile app using a back end web service, or it may be a straight phone call. Or it may represent a combination of all of these elements, coupled with video or pictures. In the short term, enabling mobile service is often simply supporting the more traditional web and voice channels. True mobile may encompass a single customer contact that transverses all of these media for a single issue, going from web to voice to video during a single interaction.

Alternate voice

Alternate voice is a channel that is not being talked about much in the industry but has strong potential to change contact center infrastructures dramatically. Alternate voice can be as simple as a web click-to-call which ultimately generates a call back on the standard PSTN. Calls of this nature can be managed by existing call center systems.

Current channels - Voice, email, chat

Despite the massive growth of the new assisted channels, PSTN voice still accounts for 73% of the contacts that come into a contact center, and overall volume still continues to grow, albeit more slowly than the newer channels. Of the remaining 27%, email and chat are predominant. What is still not clear, however, is whether the growth of these new 'digital' channels is displacing voice or is in addition to the voice volumes. Industry dogma tells us that introducing a chat channel will not lower phone volumes at all; however, no information is available that tells us whether chats are new interactions with the customer, or if they are failing to provide the required service and still driving customers to the voice channel due to service issues.

Once the PSTN is taken out of the picture, the required infrastructure changes rapidly. Google Voice and Skype are internet technologies that are quite mainstream today yet are largely unsupported in a contact center. Newer capabilities such as Facebook Voice Chat have the potential to be extremely popular amongst end users.

WebRTC is a new technology that may be a game changer for contact centers. It is a standards based technology that provides the ability to easily create browser to browser based voice/video calls with no additional software downloads and has the ability to democratize voice applications to anyone with a browser. Companies could include voice and video communications in any web page with a few lines of Java Script. End users searching for a phone number on Google would no longer have to switch to the phone. They would be able to select "Talk" right on the browser search page and be directly connected with the call center.

These alternate voice channels, while largely unsupported in the contact center today, represent a significant change to the contact center's technological infrastructure, and should be considered in any long term planning.

Video

Video is still a wild card –it's unclear whether the public actually wants live video support to a contact center through mobile or other means. Interactions are trending digital which is moving the opposite direction when related to voice calls, being less impersonal rather than more so. There is, however, a strong case to be made around incorporating pre-recorded video in self -service. Video is very well suited to these applications – for example, instructions on how to configure a cable box.

Historical channels

Historical channels are often ignored when planning for a true omnichannel customer experience. Consider that customers have interactions with your organization by walking into the branch and interacting with an actual person, or by putting pen to paper and using white mail. These interactions still represent part of the overall customer experience and should be considered in any successful channel strategy.

Back office

Back office interactions are also often ignored in conjunction with the contact center. However, a true enterprise view of any customer interaction set should include all time and activity spent on servicing the customers overall needs. This would include direct 'face time' with the customer, but should also include offline work done behind the scenes that leads to service delivery.

OMNICHANNEL MANAGEMENT

Element 1 – Do it right the first time

Change the focus from getting it done to meeting the needs of the customer

Although 71% of customers agree that valuing their time is core to good service, this concept extends beyond the standard telephony metrics used today.

Customer frustrations are magnified when multiple call backs are required from the customer to resolve an issue, or when customers start an interaction in one channel and have to move to another for resolution. Using processes that do not ensure that a customer's issue is resolved clearly does not value the customer's time. It increases the overall customer effort and negatively impacts customer satisfaction. As a side effect, it also increases your internal costs dramatically with negative customer value being associated with those dollars.

It seems a little obvious, but focusing long term strategic efforts on meeting the customer's need will help eliminate the variations that are inherent in supporting multiple channels. World class organizations agree that meeting the customer's need should be a prime focus; however, many companies are not as far along in the maturity model and still focus heavily on metrics such as hold times or transfers.

As a final statistic, unsurprisingly, 100% of customers want their request resolved. We do not believe that statistic will ever change.

Element 2 – Empower your agents

Give your agents the tools and information they need to deliver the best service.

As companies move up the maturity model, they can increasingly improve how they can associate a complete customer context with a call and ensure that they do not lose the information.

Key to this is capturing full history as customers change channels and in providing the same information across multiple interactions. 75% of people contacting a company will change channels when an online service fails. Contact history – showing any type of assisted service contact a customer has had with the company - ensures that the agent knows what the customer knows.

Empowering agents with the best information to resolve a customer issue is a key component of a multichannel strategy.

At its simplest, if the agent doesn't have the information they need to be able to consistently provide the customers with what they are asking for, it costs you both in dollars and in customer goodwill. When confronted with the complexity of new channels using dissimilar technology and management platforms, it's easy to miss out on the fact that, regardless of channel, it all comes down to your ability to have the right information available for the customer when needed. This can be empowering agents with better information or simply making that same information available to the customers when they choose some form of self service.

Element 3 – Remember what your customers have done

Don't lose information about your customer – across agents, across channels, or across time.

A staggering 42% of customers report being frustrated at repeating information when they contact a business. As customers transfer between agents on a single phone call, many contact centers have difficulty even today in transferring the context of that call to the new agent. This, unfortunately, is only the tip of the iceberg.

Customer service involves understanding not only who your customers are but also what they want and what they've done. You should know what interactions your customer has had with you – your customers certainly do!

Normalizing your customer contacts across channels using a customer experience strategy based on business interactions and contact drivers provides a framework through which you can begin to determine and collect an accurate customer context for each and every interaction they have with your organization, across channels and across time. Having consistent information available on every interaction allows you to create live customer histories, showing all customer activities with your company to any agent who deals with that individual.

Element 4 – Separate the channel from the process

Normalize interactions and use consistent processes, with consistent information, across channels.

Being able to have consistent processes and outcomes by differentiating between the channel used to service the customer, with its inherent capabilities and limitations, from the actual process that should be used to handle the interaction.

Separating the 'channel' and the actual business 'interaction' allows your company to normalize every customer issue across every channel for a consistent view of performance.

This separation allows the number of processes, systems, and effort used to be reduced and simplified. When a set of processes is used to handle a customer inquiry on the phone but requires an email to be parked overnight, inconsistencies in service levels result and this impacts both the internal and external experience.

Element 5 - Eliminate channel silos

Eliminate technology islands. Use a consistent, integrated set of management tools for every channel.

With legacy infrastructures, it becomes cumbersome to add in a new channel that isn't siloed. The expense of adding a new silo to support a single new channel is often dwarfed by the expense of implementing it properly unless some clear, long-term omnichannel strategies are used. Adding these silos creates the downward spiral of customer satisfaction, with new capabilities being added without consideration of the bigger customer experience picture.

World class organizations are moving to new metrics that are heavily focused on outcomes that matter – their ability to resolve a customer's issue the first time, the time to resolution, and repeat contacts. These analyses are complicated when cross-channel performance is evaluated with different management tools and capabilities (and sometimes none at all!) providing apples to oranges management results. Contact analysis is still required, and is made more cumbersome through unknown inconsistencies and through trying to map the varying and incomplete interactions reactively, after the fact. By siloing the channels, businesses self-create a 'big data' problem from what could be easily contained as 'small data' through forethought and better planning.

By eliminating customer service silos, performance can be viewed in terms of the real value of the additional channels – are they cost effective? Do they generate revenues? Do they have a net positive or negative effect on how much the customer trusts the business to do what they promise?

Fundamentally, the data can help you understand why and how your customers interact with you, and let you use that information to improve operations.

New channels, if not viewed based on the business outcome desired, create inefficiencies from redundancy, cost, and poor service.

Element 6 – The right technology investment

Consider customer contact drivers, and current and future channels when considering technology upgrades.

Investment in technology to support of channel growth and expansion is consistently listed by analysts as one the top priorities businesses should focus on today. But clearly, investment in infrastructure for infrastructure's sake is not getting funding. New initiatives require an immediate return on investment, and tying in other shorter term priorities helps offset the infrastructure spend.

It's clear that a long term strategy must envision an infrastructure that is cost effective today, but can expand quickly. Understanding how technology is going to support the channels provides an initial ROI. But understanding how the technology is going to perform long-term for channels that aren't even properly understood today is key to any investment.

The business need for any omnichannel solution is to be able to consistently understand the customer journey – something which doesn't sit in a single channel, but rather traverses every contact mechanism you make available. With new channels developing at Internet speeds, businesses must be able to provide agile, consistent and effective service and support, leveraging whichever channel the customer finds convenient. Agile means that new channels can be supported quickly and effectively; consistent means that the information available from one channel is available on any other channel. The inconsistencies inherent in channel silos are going to be created if you've got a different set of information on your self-service than what is available to the agent, and those inconsistencies in turn begin to complicate any attempt to understand the cross channel experience.

BUSINESS INTERACTION MANAGEMENT SOLUTIONS

By focusing on the customer intent of an incoming interaction, Upstream Works has created a new category of solutions focused on enabling the management of customer interactions right across the business. Capturing the individual customer interaction details provides the missing link for CRM applications and allows a business to determine customer experience and satisfaction not by what they say, but by what they actually do.

By capturing interactions across multiple channels in a consistent and simple fashion, Upstream Works allows businesses to easily add new channels and to define new business management paradigms based on information thought to be previously unavailable.

An Upstream Works omnichannel solution provides business interaction management and will allow businesses to:

- Proceduralize and improve First Contact Resolution metrics - across time and across channels
- Reduce customer effort by predicting future interactions based on past behaviors
- Eliminate management and information silos by providing a consistent set of information for all users
- Improve customer service by empowering agents with historical customer information on every channel in real time
- Improve channel containment by determining what drives people to change channels
- Reduce overall costs by eliminating redundant contacts that add no value and reduce customer satisfaction

CONCLUSIONS

Separate the interaction from the channel. Look for how content is routed to the agent and make that work consistently. Separate the contact channel from the process used to provide the business outcome.

Look to reduce the complexity that has historically been in place in your customer service organization. Invest in technology that supports the easy addition of new channels and allows you to respond to market changes or competitive pressures. Open technologies that allow business to respond quickly and more simply are available today, and are the best type of investment.

Look at powerful applications that provide all the meaningful contextual information an agent will need to properly service your customers in a consistent fashion, regardless of channel, process or time.

Look for agility and manageability - so that you can get those new channels or functions added easily and quickly without creating new servicing and management silos.

Without a common linkage between these channels, you can't easily determine if your contact center, digital and self service strategies are actually effective.

By focusing on the reason for the interaction, and developing processes and systems based on the needs of your customer, you can simplify your cross channel integration and provide great omnichannel service that will differentiate your business to your customers.

About Upstream Works

Founded in 2000, Upstream Works uses interaction management as a way to simplify and understand the entire customer experience. Our solutions reflect our core philosophy that providing the best customer service is the cheapest, most profitable option for any company. From agent desktop to analytics and contact center automation, we provide companies with the multichannel insight and automation they need to simplify the agent experience, successfully improve First Contact Resolution, and manage the customer experience.

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Feedback and more Information

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

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