

Intelligent Contact Routing

10 tips to ensure customers reach the right agents and resources and have positive customer experiences



A Content Guru White Paper

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Table of Contents



Table of Contents	2
Introduction	3
Ten Intelligent Routing Tips	4
1. Put Customers in Control of the Communications Process	4
2. Use WFO & Skills-Based Routing to Improve Customer Matching	4
3. Turn Wait Time into Productive Time	5
4. Set Contact Routing Rules that Fully Support Business Objectives	6
5. Make Full Use of All Available Information for Contact Routing	6
6. Act on Customer Insight and Feedback	8
7. Promote Continuity and Consistency	8
8. Avoid Customers Making Contact in the First Place	9
9. Actively Manage the Customer Journey	9
10. Maximise Flexibility with a Cloud Customer Engagement Hub	10
Conclusion	12
About Content Guru	13



Introduction

The contact centre is rapidly transforming into the customer engagement hub. The 9-5, Monday-Friday call centre is nearing extinction as customer demands continue to soar for multi-channel interactions, wherever they are, whenever the time, and whatever way they choose.

The key metric at the heart of this revolution is the Customer Experience (CX), which is increasingly interwoven into consumer and organisation thinking. 55% of customers would gladly pay more for a better CX¹, and by 2020 it is expected to overtake price and product as THE key brand differentiator².

Positive and negative CXs can have a major influence on buyer behaviour. 94% of customers who have experienced a 'low-effort service experience' say that they will buy from the same company again³, while another study suggests that it takes 12 positive experiences to recover from one unresolved negative one⁴.

Several factors affect perceptions of CX, but a significant one is the speed and efficiency by which customers are routed through to the correct resources.

Intelligent Customer Routing is a term that describes the process of connecting a customer to a contact centre agent, or automated resource, that's equipped to manage that contact - according to the business rules set by the supplier organisation.

While the term is usually used in relation to inbound customer contact management, it could also apply to outbound contacts – and these can be across any media, including Instant Messaging (IM), phone, email, social media, video, SMS and more.

In this eBook, we discuss ways in which organisations can efficiently, quickly and consistently route customer contacts to the right resources, every time, to boost CXs and facilitate the necessary transformation of their contact estate into the customer engagement hub.

1 thinkJar, 2015

2 Customers 2020 Report

3 CEB Research, 2014

4 Understanding Customers by Ruby Newell-Legner



Figure 1: Today's complex communications environment



Ten Intelligent Routing Tips

1. Put Customers in Control of the Communications Process

Innovations such as IP, mobile technologies and social media have transformed the way customers engage on a personal level – they can access virtually any mode of communication through devices such as smart phones. Consumers are now taking these expectations of freedom over how they interact to businesses.

To deliver a great customer experience then, give customers greater choice over how and when they make contact - as well as which communications channels they can choose. Also provide a range of automated options (phone web, email etc.) to manage simple and repetitive customer enquiries, freeing live agents to focus on more complex and high value queries.

Giving customers greater control over the communications process, in conjunction with more intelligent contact routing, will maximise the chances of getting customers the best possible experience - as well as a first time fix. True customer engagement relies on the seamless unification of information and communication interfaces – whether live or automated.

2. Use WFO& Skills-Based Routing to Improve Customer Matching

Use Workforce Optimisation (WFO) technology in combination with scalable customer engagement capabilities to forecast future customer contact volumes and ensure the right number of agents, with the right skills, are available to handle these interactions. Advanced WFO solutions will carry out this function for all media (web chat, email, social media, SMS, voice calls etc.) and contact types (inbound sales, retention, technical, service queries etc.) as well as for both automated and live agent resources.

By accurately forecasting the volume and nature of upcoming contact volumes, and building efficient workforce rotas where sufficient resources are available at exactly the times they are required, organisations maximise their chances of getting customers through to the right people and resources quickly, each and every time.

Furthermore, organisations should look towards contact centre and customer engagement software which delivers intelligent skills-based routing criteria. This enables agents and agent groups to be assigned relevant abilities (such as proficiency level in particular languages, knowledge areas and even certain behaviours), and then for the software to automatically match customers to the best available agents.

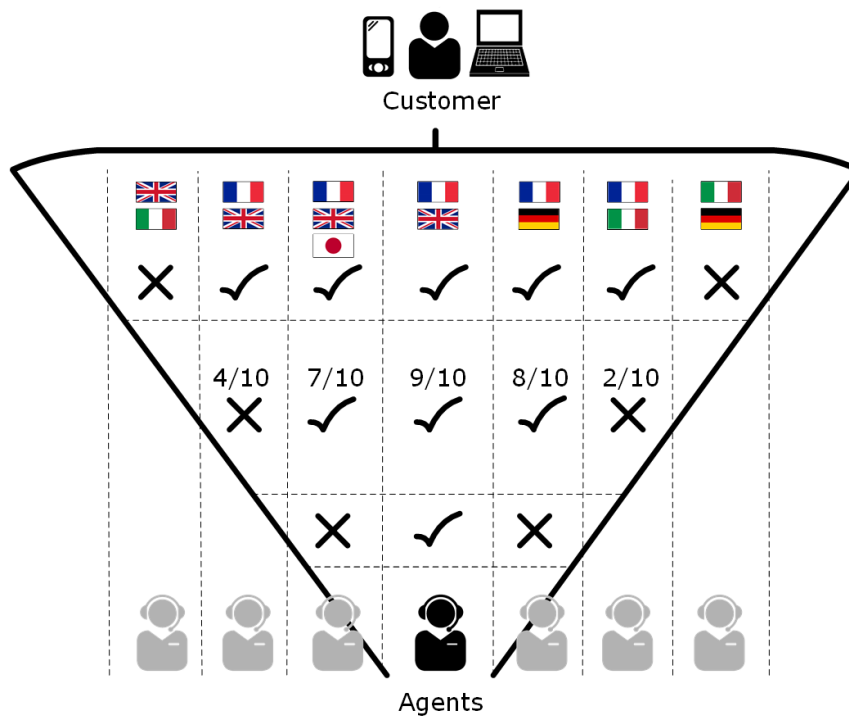


Figure 2: Connecting customers to relevant agents

3. Turn Wait Time into Productive Time

However efficient your company’s workforce scheduling and automation capabilities, there is sometimes no substitute for engaging with a human agent – and when this happens, queues are occasionally inevitable. An effective customer engagement hub maximises the value of any time spent waiting in a queue, and delivers positive experiences which are far removed from the traditional stigma of endless on-hold music.

- When customers are waiting in a call queue, there are many more options than simply providing hold music with no context. Use information known about the person to present personalised information to callers - such as offers that they are entitled to, or products/services that you think they may be interested in - to create a richer customer experience. Alternatively, provide the option of requesting a callback – or multi-channel contact – at a time that is more convenient to them.
- If the customer is waiting in queue for a web chat, again use the time to provide relevant information such as self-diagnostics information, Q&As, customer offers etc.
- Make sure that your customer contact technology has a breadth of integration options available, which will allow you to automatically identify customers and route them more efficiently – minimising the time they will spend waiting in a queue, and even in many cases automatically connecting them to the information they need, without having to speak to an agent.

The importance of creating positive on-hold experiences is frequently underestimated. Get it right and a proactive on-hold strategy can play a key role in minimising customer frustration - and present valuable cross and up-sell opportunities while delivering a more personalised, engaging journey for your customer.

4. Set Contact Routing Rules that Fully Support Business Objectives

Modern communications software typically supports varying degrees of Intelligent Contact routing. The key is to pick the correct ones for your business – particularly those that deliver flexibility in how you manage contact routing. For example:

- Do you want to manage inbound contacts on a first-come, first-served basis? Or do you want to give priority service to Premier customers?
- Does it make sense to prioritise and route customers based on the telephone number they are calling from (or their email address)? Or alternatively, based on the number they are dialling (or email address they've sent to)?
- Should contacts be prioritised and routed based on account status, VIP flags, customer category and blacklists?

The same principle applies to selecting which agents handle which contacts:

- Should new customer contacts be sent to agents that have been waiting the longest time since handling the last contact, or the ones with the most appropriate skill sets?

The answers to these questions will not only depend on the nature of Key Performance Indicators (KPIs) within the contact centre but often on broader corporate objectives. More sophisticated contact routing software will enable you to take advantage of highly complex algorithms which take into account multiple factors, and then use these to automatically determine the best possible destination for each interaction.

5. Make Full Use of All Available Information for Contact Routing

In the customer engagement hub, information is as critical as communications. The ability to work with systems such as CRM and even legacy databases is important to delivering the fully-cohesive customer engagement hub.

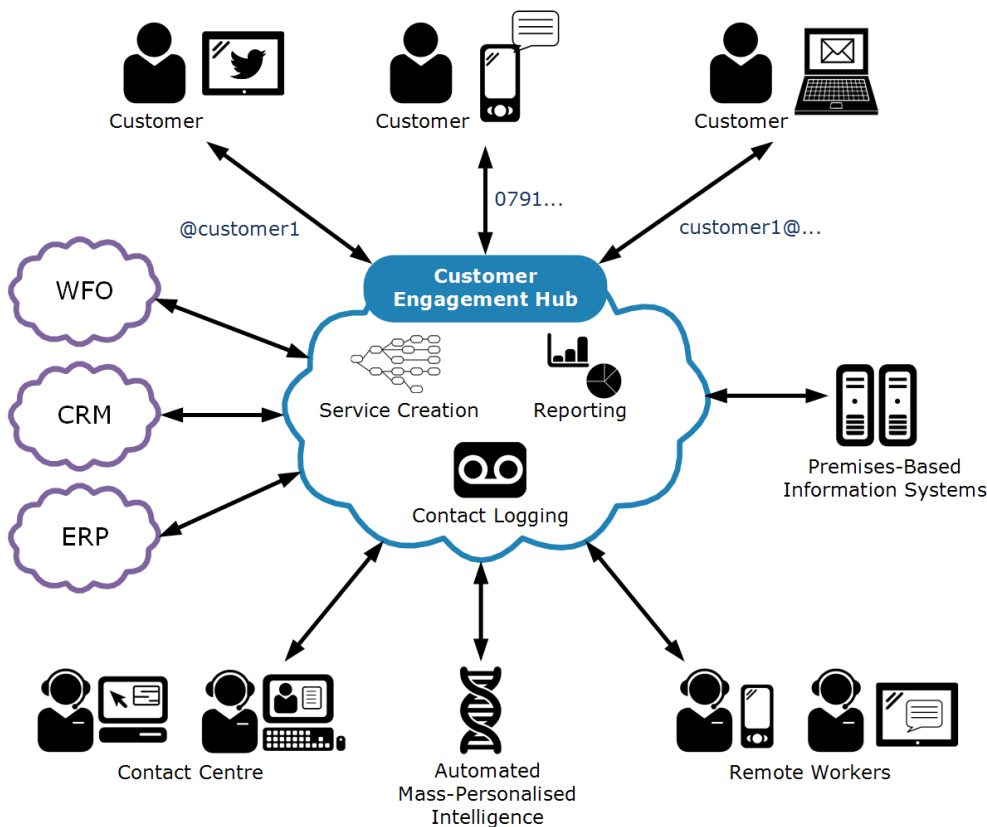


Figure 3: A simple Customer Engagement Hub, including basic integration to premises-based and cloud information & management systems

Once you've decided on Contact Routing business rules, use all available information and techniques to help intelligently route inbound contacts:

- Capture customer ID information from customers using digital channels - i.e. their email addresses, mobile phone numbers (in the case of SMS), social media handles etc. - and match these details to customer profiles on a Customer Relationship Management (CRM) system – or even on your internal customer information databases. Pop-up relevant screens of customer information on agent screens as contacts are delivered to their desktops. For callers, capture Calling Line Identification (CLI) information and use this data to look up customers' profiles and deliver relevant screen-pops to fully inform agent communications and deliver a consistent customer experience.
- If CLI is not available for callers, or its use is just not helpful/practical, leverage technology such as Automated Speech Recognition (ASR) to ask customers to identify themselves by entering their account numbers, or query references, into an Interactive Voice Response (IVR) service.
- Use recent Customer Journey history (see point 9) - such as information on web pages that the customer has recently visited while shopping online - to make more intelligent routing decisions. Customer engagement software which integrates with WebRTC will be crucial to such features.
- Where appropriate, use Contact History to route customers to dedicated Account Managers, or to the last agent (or agent group) they had contact with (see point 7).
- Use information contained within CRM Records to route customers to appropriate agents (or agent groups) for their Membership Status, Service Status, or Customer Type.

- Use context-aware applications to dynamically optimise interactions based on prior purchases, or other business insights (see point 6).
- Customise interaction routing by time of the day, day of the week or day of the year.
- When supporting flexible working, ensure that your customer engagement software leverages 'presence' technology so that contacts are routed only to available and relevantly skilled agents – true, unified cloud solutions eliminate the distinction between homeworkers and office-based colleagues. Flexible workers might be at home, in the office, in the car, at a remote location and presence ensures that your system can always track their availability.

6. Act on Customer Insight and Feedback

Personalisation is key to the delivery of quality modern service. And creating the ideal personalised service isn't just about taking note of 'hard facts' about people such as who they are, what they own, where they live, their level of disposable income, and their buying history. It's also about taking into account 'soft factors' such as their preferences, goals and behaviours.

Hard facts are often easily found within customer records and information entered into apps, IVR systems etc. Soft factors, however, are typically more difficult to identify and quantify.

The best customer engagement hubs make use of Mediated Interaction Matching (MIM) technology which uses cutting-edge analysis and learning algorithms to evaluate factors such as personality – and then connects customers to agents based on these criteria.

An example of how this is done involves speech analysis, which delves into the 'content' of conversations to better understand customer needs, preferences and behaviours. Then organisations can use this information to improve call scripts, enhance agent training, resolve problems and improve business processes.

Also bring together information from as many other sources as possible. These should include customer survey and customer feedback exercises, plus historical and real-time insight from contact handling, workforce optimisation, performance management, call recording, quality management, Google Analytics and other technology platforms.

Analyse all this data, share knowledge, create actions and then, whenever appropriate, use the insight gained to route contacts more intelligently.

7. Promote Continuity and Consistency

One of the things people consistently say they dislike about dealing with contact centres is having to repeat information. People hate putting account information into IVR systems and then having to repeat that same information to agents. They also hate repeating information about a query to one agent that has already been covered with another agent the previous time they made contact.

Consistent information and efficiency are cornerstones of the customer engagement hub. An effective deployment leverages all available information to connect customers to familiar agents or automated resources, which in turn use previous contact information to continue conversations rather than starting them afresh.

One example is to intelligently route customers to the same agent or resource that they dealt with last time. Take the case of a customer that describes a complex technical fault to an agent - and then their phone connection drops. The last thing that person would want to do is re-explain the same issue to a different agent the next time they call in. So capture the customer's contact identity (i.e. CLI, email address etc.) and use intelligent call routing to route the caller to the agent they originally spoke to for a joined-up service experience.

Another option is to give customers with an open ticket priority next time they make contact - which can be achieved by capturing the customer's contact identity and performing a database look-up to see if that customer has made contact before.

Also deliver consistency across channels so that customers don't feel that they are penalised for using a particular channel.

8. Avoid Customers Making Contact in the First Place

One of the most effective ways to give customers a smooth customer experience and get them through to the right resource, rapidly, time after time, is to 'unclutter' your contact centre.

Take steps to ensure that customers don't make service queries unless they absolutely have to by identifying bottlenecks and broken processes and amending business processes as appropriate.

Conducting a Demand Categorisation exercise is a great place to start. Using a categorisation methodology such as the CORE technique from Lloyd Parry, segment historical customer contacts into logical categories to identify those that are positive and those that are negative.

CREATE	contacts that deliver value effectively to both parties
OPPORTUNITY	contacts that create opportunities to develop new products/services
REMEDIAL	contacts that occur when a process or product/service goes wrong
EXTERNAL	contacts that represent waste or demand generated by third parties

This technique will help strategically focus on where something has gone wrong and identify bottlenecks and broken processes. From there, adapt and amend processes to ensure problems don't re-occur, recognise new opportunities, resolve issues, and remove waste.

According to Lloyd Parry, 50-70 per cent of incoming customer contacts are generated by failures within systems and products. While Demand Categorisation can be conducted manually, it is often much quicker and more effective when technology is used. So ask advisors to record details of contacts into CRM or similar database systems in order to more easily highlight avoidable contacts, assess where they come from, and analyse why they are occurring.

By reducing contact volumes, organisations can maximise the chances of customers being routed to the right agents and resources quickly and efficiently

9. Actively Manage the Customer Journey

Up to this point, this eBook has discussed how organisations can intelligently route inbound customer contacts based on where those people are calling from, what they're calling about, and what's known about them.

But a true customer engagement hub delivers a consistent and efficient service across all endpoints - both inbound and outbound. What about intelligently routing 'connected' outbound sales calls made using predictive diallers to the most appropriate agents, and

supporting this with consistent email and SMS campaigns? And what about intelligently routing inbound customer contacts to the most appropriate agents/resources based on what we THINK those people may be interested in?

In both cases, a technique called Customer Journey Mapping (CJM) can help organisations make the best routing decisions. A Customer Journey Map is a graphical representation of the interactions a customer typically has with an organisation/product/service from the time they first encounter that organisation/product/service to the time they cease to be a customer. In other words, it maps a journey from the customer's very first web search, through to the purchasing, registration, service, renewal and churn phases of their association.

Armed with CJMs that describe 'ideal' customer journeys for different customer types and products/services, organisations can more effectively undertake Root Cause analysis to discover why 'negative' customer contacts occur and, where appropriate, improve business processes to ensure they don't occur again. More significantly in this context, CJMs are also very useful at identifying opportunities to deliver proactive service by triggering actions.

Take a customer nearing end of contract. An 'actionable' CJM can trigger an action that says 'when customer reaches month 11 of their contract, make a renewal offer based on their status'. That offer could be made via a proactive outbound call/email, or the next time that customer initiated an inbound contact. Likewise, if the customer's CLI is identified as 'new customer recently registered', intelligent routing could take that customer through to an agent skilled to cross and up-sell complementary products.

10. Maximise Flexibility with a Cloud Customer Engagement Hub

To effectively implement the tips detailed above, many organisations will need to adapt. They will need to amend business processes, train and skill employees, restructure operations and implement new technology. When it comes to implementing an intelligent customer routing strategy, many organisations are now turning to cloud-based technology solutions. Compared with older generation on-premises technology solutions, services delivered via cloud platforms are typically more:

- **Scalable**(scaling to handle any simultaneous volume of enquiries on-demand).
- **Reliable**(cloud platforms such as **storm**® provide up to 99.999% ('five nines') uptime guarantees).
- **Secure**(industry-leading platforms are backed by some of the world's highest security accreditations, including ISO27001 for data security).
- **Evergreen**(applications and capabilities are continually upgraded to ensure clients can access the most up-to-date service versions at no extra cost).
- **Agile**(changes made on leading platforms come into effect immediately).
- **Compliant**(leading cloud platforms should have accreditations such as FCA, Ofcom, PCI DSS, ISO9001 and TickIT).
- **Virtual**(enabling people to work from anywhere - the office, home, a remote office or on the road).
- **Automated**(integrating with CRM and other back-end systems to simplify key business processes and prevent customers having to repeat themselves).

Cloud services are usually charged-for on an OpEx basis with minimal capital investment required. This ensures that, more often than not, they deliver a lower total cost of ownership over a five-year period than customer-premise solutions of equivalent functionality.

The complexity of the modern world means that there are more endpoints than ever before – and this is only likely to increase. Rather than approaching these on a case-by-case basis with an on-premises solution, the cloud model enables organisations to implement a powerful and adaptable customer engagement hub.



Conclusion

This eBook highlights 10 Tips to Ensure Customers Reach the Right Agents and Resources, each and every time:

1. Put Customers in Control of the Communications Process
2. Use WFO& Skills-Based Routing to Match Customer Needs to Agent Skills
3. Turn Wait Time into Productive Time
4. Set Contact Routing Rules that Fully Support your Business Objectives
5. Make Full Use of All Available Information for Contact Routing
6. Act on Customer Insight and Feedback
7. Promote Continuity and Consistency
8. Avoid Customers Making Contact in the First place
9. Actively Manage the Customer Journey
10. Maximise Flexibility with a Cloud Customer Engagement Hub

By following these ten simple tips, organisations can route inbound contacts more intelligently and enjoy many associated business benefits including:

- **Improved first contact resolution rates:** by detecting which agent, extension or service is the most suitable for each contact
- **More effective automated menus:** by learning from the automated menu options most (or least) frequently chosen
- **Reduced average handle time:** by assigning actions usually performed by an agent to the initial routing strategy (e.g. asking customers to enter account details into an automated)
- **More effective contact handling:** by automatically screen-popping customer details onto agent desktops
- **Reduced caller wait times:** by learning from caller patterns such as how long the average caller is waiting to wait on hold
- **Lower costs by switching customers to self-service:** by identifying WHY people are making contact before they are routed through to an agent, and
- **More efficient contact management:** by anticipating customer needs, addressing broken processes, and proactively managing relationships.

About Content Guru



Content Guru is a multi-award-winning provider of cloud-based communication solutions, delivering services through **storm**®, Europe's largest and most versatile Cloud Contact Centre & Communications Integration™ platform.

Hundreds of the world's largest organisations are powered by **storm**, in sectors ranging from utilities and travel through to finance and government, and include EDF Energy, Chubb and National Rail Enquiries.

These clients choose the platform for its unparalleled scalability and reliability in handling enormous volumes of multi-channel communications, its flexibility in consistently delivering best-in-class services anywhere, anyhow and at any time, and its scope for truly global deployments.

storm supports hundreds of applications, including:

- Multi-channel Cloud Contact Centre & Unified Communications (email, voice, SMS, IM, web and social media from a single platform)
- Communications Integration (converging data and communications, and enabling disparate systems to interoperate)
- Machine-to-machine interactions
- Propensity modelling (interpreting data sources to deliver mass-personalised messaging and unprecedented customer engagement)

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