INSTRANET BEST PRACTICES SERIES

The Top 10 Information Challenges in Today's Call Center

A Management and Agent Perspective on Building a World-Class Customer Service Organization Using Knowledge-Based Applications

Executive Summary

With increased pressure to remain competitive and cut costs while providing premium customer service, companies are expecting more every day from their call center operations. Investments in mature technologies such as IVR, ACD and CTI have advanced capabilities and created new levels of customer service. Now, a new wave of technology is emerging including advancements such as voice over IP, virtual agents, performance management, web collaboration and analytics. But there is also a significant opportunity today around agent productivity and the efficient management of knowledge and information needed to do their jobs. Agents often find themselves in the middle of content overload: product information, marketing promotions, support documents, procedures and reporting, customer data, and more. As a call center manager facing ever-increasing pressure to do more with less, the best alternative is often to automate using second-generation knowledge-based applications.

> *"The contact center continues to be the largest single channel through which most organizations communicate with their customers and constituents. Buoyed by investments in ancillary customer-facing initiatives, such as customer relationship management (CRM) applications, Web-based customer initiatives, customer experience management (CEM) technologies, and others, the contact center continues to be one of the most cost-effective and profit-effective ways to maintain marketing, sales, and service-centric communications with the customer."*
> ***– Aberdeen Group, Inc., April 2003.***

It's with this premise, the exciting new opportunity to optimize the call center operation using knowledge-based applications, that InStranet presents this best practices document as a starting point. Use it to spark ideas and insights into answering some of your most demanding questions, from both a management and agent perspective:

- *How do I implement a consistent process across all of my agents to efficiently handle complex information-based customer interactions?*
- *How do I keep **agents up-to-date** on the latest marketing promotions?*
- *How do I **improve first call resolution** using existing marketing and product information?*
- *How do I reduce training costs and measure its effectiveness?*
- *How do I **maximize up-sell and cross-sell** success rates?*
- *How do I provide contextual information to agents during a live customer call?*
- *How do I **increase the speed** at which agents can find information?*
- *How do I ensure agent feedback is captured and sent back to product and marketing teams?*
- *How do I make it easier for an agent to "pitch" a promotional offer to a customer?*
- *How do I create an environment that encourages agents to learn and even makes it fun?*

The Top 10 Information Challenges in Today's Call Center

The Management Perspective

1. How do I implement a consistent process across all of my agents to efficiently handle complex information-based customer interactions?

Today's products are complex. More often than not, when customers call in for support, they have numerous questions; some may be technical, while others may be related to service or a totally different topic. Each touch point is an opportunity not only to address a customer dis-satisfier, but to transform the call into a positive outcome – a product recommendation, free offer, or some other loyalty program designed to enhance the customer experience with your company. Today's systems however are typically designed for one type of customer call only; such as a troubleshooting call, a helpdesk call, a support call, or a service call. Today's leading operations though have implemented systems that enable agents to manage an end-to-end process for any type of call, or even any combination of call type.

Challenge:
Implementing a consistent process to handle diverse and complex calls including support, problem resolution, troubleshooting, helpdesk, up-sell/cross-sell so that each agent is prepared with the right information at the point of customer contact.

Best Practice:
Define a standardized process for each customer interaction. Implement a web-based system that enforces that process via a workflow. Provide "trigger points" that enable an agent to dynamically change the type of call on the fly, resulting in relevant information being automatically displayed for the agent. Integrate information systems using a common metadata layer and present the information through a unified interface eliminating the need for agents to access different interfaces and systems.

2. We have hundreds, sometimes even thousands of simultaneous marketing promotions that change daily. How do I keep agents up-to-date on the latest and greatest?

Typically this challenge can come in a few forms. One is at the corporate level. The challenge here is to keep your agents up-to-date on all of the product lines across the corporation, including the latest news, product bulletins, announcements, marketing promotions and other information that they will need available to communicate to the customer. The other is at the management, or contact center level. This means being able to define priorities and processes at the local level across the operation.

Challenge:
Keeping agents in sync on corporate marketing promotions, product information and support programs while also maintaining local control on priorities and processes for servicing customers.

Best Practice:
Create a "dashboard" view where an agent can see the most critical corporate information immediately. Also provide a window where information at the contact center level can appear including content such as local process for handling calls, procedures, forms, training materials and

weekly priorities. Segment marketing promotions and assign expirations so that information automatically appears to an agent at the right time. Consider a simple integration layer between the CRM system and marketing/product databases so content can be correlated in real-time at the agent level. Enable an "offer" button that guides an agent seamlessly through a script and all of the materials required to walk a customer through a customer promotion.

3. How do I leverage existing marketing and product information to improve first call resolution?

This is the age-old challenge that you've no doubt spent countless hours analyzing across your operation. Although there are many facets to improving your first call resolution time, the Web has provided an exceptionally easy and low-cost way to enable agents to quickly access information in real-time while engaged with a customer on a call. Technology improvements in the areas of search, metadata, and content integration have advanced further the capability of providing agents everything they need in one easy-to-use application.

A key consideration here is the ways your agents can access information. Not all agents do their job the same way. Likewise not all customer calls are the same. Often, leading contact centers have reduced their second level transfer rates by providing agents numerous ways to search, navigate and retrieve information to answer a customer inquiry. For example, one popular technique is to automatically display the current top 10 documents that are being used across your contact center at any given time to solve issues, and provide single click access to them to the agent (or via Web self-service). Another idea is to integrate CTI systems with documents so that relevant documents for that particular customer are automatically displayed on the agent screen, saving them time.

Challenge:
Improving first call resolution by improving the agent's ability to quickly locate, retrieve and act upon relevant product, marketing and support documents while on a live customer call.

Types of Call Center Information

Document Type	***Document Format/Location***
Marketing promotions	**Word, Excel**
Support documentation	**Word, PDF, HTML**
Training materials	**PowerPoint, Word**
Self-service	**Web Site, HTML**
Customer data and history	**CRM System**
Product information	**Database, File Systems**

Best Practice:
Create an inventory of the types and formats (and locations) of documents and content used by agents during a typical call. Link each to a customer service or selling process. Each document should be related to one of these two key business processes. On the technology side, build a flexible J2EE integration layer that can automate content delivery to your agents via the Web, without re-engineering existing systems and repositories. Measure document success rates (i.e. did this document help solve the customer problem?) and ensure more effective documents are more readily accessible not only for an individual agent, but across the entire team.

4. How do I reduce training costs and measure its effectiveness using a knowledge application?

Your people are your biggest investment. Training them, motivating them, and ensuring they are best equipped to handle customers is critical. Unfortunately, early efforts in systems to support call centers focused on technical systems and technologies such as ACD, CTI and IVR. These are mature products with proven efficiency that have helped scale operations to support thousands, and even millions of customers. But these early technologies overlooked a critical ingredient: people. Next generation software technology has emerged that focuses on the importance of agent training. Knowledge applications can complement these solutions by providing a variety of ways to train agents while they are not on calls. In addition to standard live training events and classes, agents can interact with the knowledge application to learn about new products, new promotions and new processes. The manager can "flag" various content depending on degree of criticality and, even further, can segment it by region, skill set, or product set providing granular control over which agents are trained. By enhancing existing training programs with this self-paced training via a knowledge application, managers can maximize the off-call productivity of agents, and increase agent productivity and awareness.

Challenge:
Reducing agent training time and cost. Maximizing agent productivity while "off-call".

Best Practice:
Create an "off-call" training mode where agents can see the latest training modules and documents. Enable a self-guided pace so that agents can work around their schedules and calling responsibilities. Track "agent awareness" by skill type, geography and product area, and provide simple metrics for the agent and manager to track and evaluate against agreed upon objectives. Setup a document dashboard that integrates knowledgebase content, document repositories and technical document libraries to reduce the number of different places an agent needs to go to get the information.

5. How do I maximize up-sell and cross-sell success rates?

Your agent has just successfully resolved a customer issue. Is the call completed? Not if you are one of the growing number of contact centers focused on generating revenue. More than likely you are being pressured to transform into a profit center, or maybe you are a leader who is championing a new vision for your operation that is leading new revenue streams for your organization. In either case, you now need your agents to not only solve, but also to sell.

Typically there is a very brief window of opportunity near the close of a successful call, where the "iron is hot" and the customer is most receptive to a potential up-sell or cross-sell offer. In fact they may even be expecting it as in many cases this is how customers learn about new products and services. This is when agent needs to perform two tasks successfully: (1) the agent needs to identify the right product or service to offer; and (2) the agent then needs to deliver the "pitch". In both cases a well-designed process can automate both steps. For the first step, the best-designed systems correlate CRM data containing customer history along with product and marketing systems to automatically present to the agent a few promotional offers. Typically using a point-and-click Web interface, the agent then need only select the right offer and then deliver the pitch. It's easy and takes the guesswork away from the agent for matching the right offer to that customer's particular needs. When it comes to the second step, the delivery of the offer itself, typically this is done with a script. Again this is where automation and workflow come in handy. Once the agent clicks the right offer, the associated script and promotional details are also immediately available. One particular feature though that is typically built-in to knowledge applications is a difference or benefit highlighter that automatically points out to the agent the key selling points. In very simple terms this enables the agent to explain the benefits of the offer to the customer. Sometimes it can even be as simple as "you save money"!

Challenge:
Generating revenue. Maximizing each customer touch point as an opportunity for cross-sell or up-sell offers.

Best Practice:
Create an automated workflow that guides an agent through a call, from opening script, the solution process, followed by a selling process and then close. Accompany each phase with scripts, supporting product and support documents, even videos if necessary. From a technical perspective, integrate CRM data along with promotional content so that the right promotion can be matched against a particular customer profile. Then again use workflow and automation to provide choices to the agent in the form of simple point-and-click choices. To better measure and tune results, provide a "feedback" capability where an agent can enter commentary on a given promotion, or even just click a button to indicate whether the promotion was successful or not. This data can then be reported back to the management dashboard.

The Agent Perspective

6. Make it simple…the faster I can find information, the more *context* provided, the easier it is for me to do my job.

Customers demand a lot from your agents. Fast answers. Product information. Promotional details. It all comes down to your agent's ability to professionally and quickly service customers. It's challenging enough with even one product line, but add multiple product lines, successive and rapid product promotions, different configurations or new packaging and you can confuse your agents pretty easily. And if they are confused, what about your customers?

Information is key of course to helping address this challenge. But what really makes the difference is *context*. Your agents need information, but they need it in the *context* of a customer call. We've all seen information retrieval without context – it's a search that comes back with 10,000 results. It really doesn't help. What does help, however, is when agents can see immediately the product, promotional and support documents related to that particular customer's profile. Also, if they are able to see "hot" issues currently impacting a particular service that customer may be using then they can preemptively service the customer before an issue escalates. Some of the leading contact centers have achieved this informational context by linking CTI systems to a knowledge base and cross-linking it to CRM customer data. Sometimes referred to as "context synchronization", it can reduce the number of applications your agents need to access, and provide contextual information immediately on the agent's screen.

Challenge:
Providing instant call context for the agent on the documents needed during a customer call.

Best Practice:
"Context Synchronization" – link customer data to a knowledge application that can immediately display relevant product, support and marketing documents in context of the customer call. Typically achieved using simple connectors between a CTI, CRM and knowledgebase. Streamline interfaces where possible so that an agent can readily view customer history, product information, related documents and promotional offers (such as up-sell and cross-sell scripts).

7. Make it flexible...the more ways I can find information the better. I want the system to work the way I do, not the other way around.

Agents are overwhelmed with an exploding number of documents about new products, services, procedures, training material, news, customer programs, and more. Traditionally they attempt to locate this information using keyword search. In fact, many call centers have installed a simple search engine on top of their data sources in an attempt to make it easier for agents to find documents. But this is just a band-aid. Often the effort backfires, as keyword search is too vague and not powerful enough to provide relevant information. Although still useful in some cases, the best call center operations have implemented a variety of ways for a call center agent to access information. Not only keyword search, but many other methods such as a corporate product index, dimensional navigation capability by line of business or geography, and even simpler ideas such as top 10 documents, favorites and "hot customer documents".

Challenge:
Providing multiple ways for agents to quickly access documents.

Agent Productivity: The 15 Most Popular Ways to Access Content

Method	Example
Operational Alerts	"GSM Network is Down – click here to read what to tell customers."
Reminders	"Team reminder: training on the new cell phone model needs to be completed by this Friday. Click here for the training documents."
Last Published Documents	A list of the most recently published documents.
My Favorites	A list of the agent's preferred document sets such as phone numbers, procedures, price lists, etc.
Last 10 Accessed Documents	Single-click access to the last 10 documents used by that agent.
Personal Channels	A customizable channel. For example, an agent can setup a channel that displays a continually updated list of the support documents for a particular product.
The Call Center Top 10	A list of the 10 most frequently used documents at any given time across the entire call center.
Best Rated	A list of documents that are receiving the best feedback for resolving customer issues.

Quick Keyword Search	Full text search capability.
Quick Multidimensional Search	A more precise search capability that uses filters based on the way the business is organized.
Working Content	The capability to filter all on-screen content to apply to only what the agent is currently working on.
Corporate A-Z Index	A simple A-Z index with links to related documents.
Since Last Login	A list of documents published since last login.
Document Comparison Mode	Useful for up-sell. Enables an agent to dynamically compare two documents with differences highlighted.
Diff Management	Enables an agent to quickly see specific changes in a particular document.

Best Practice:
Go beyond the band-aid of basic keyword search. Develop different ways for agents to access information so that they can use the methods that work best for their individual work style. The best knowledge applications typically include built-in navigation capability that can be used to model your lines of business, geography, customer types, product lines, etc. Also think single-click access. This is the ultimate goal for fast information access. While not always possible, if an agent can single-click to over 50% of the documents needed to do their job, you should see significant improvements in first call resolution times.

8. Make it learn…I am on the front-line talking to customers every day. I have ideas and feedback on what is working and what isn't.

It's true. When you talk to your agents, there is no shortage of feedback – the issues annoying customers, the promotions that work well, the general satisfaction level of customers. Your agent is the voice of the customer. But what to do with that feedback, and how best to even capture it? You know that this knowledge is critical to tuning support processes, marketing programs and overall customer satisfaction. What you probably don't know is how to capture it. Typically leading call centers have built-in two-way feedback mechanisms in front of the agent at virtually all times. For all programs, all documents and virtually anything that is created by "corporate" such as marketing promotions. The best knowledge applications today have a two-way feedback capability with automatic workflow, alerts and single-click ease-of-use. For example, for each document, an agent should be able to indicate whether a document "helped solve a customer problem" or "did not help solve a customer problem". Even further, the agent should be able to enter free form text so that a product or marketing manager can receive real-time feedback from the field. Also, most companies today know that capability is even more powerful when provided via self-service to customers directly on the Web.

Challenge:
Capturing the knowledge from the front-line and using it to improve support processes, product documents and marketing promotions.

Best Practice:
Make feedback buttons available on every page and every document so that agents can channel information back to product and marketing managers. Create incentive programs to induce agents to provide high quality feedback. Again, keep it simple…use yes/no buttons "Did this document solve the customer issue?" Then go further and add free form text boxes. Extend the capability

directly to customers via self-service on the Web. Provide agents every possible opportunity to capture customer feedback, or even their own innovative ideas at any time.

9. Make it easy…I spend a lot of my time up-selling customers to new products and services, but I waste time trying to figure out how to sell the benefits.

Here's a scenario. An agent has just resolved a customer question concerning the short-message capability on their cell phone. While the "iron is hot", the agent then segues into the selling phase of the call and attempts to up-sell the customer on a new calling plan package. The agent pulls up the features of the new plan and describes them. The customer then asks "what is the benefit to me?" The agent struggles…is it more air time, less cost, more features, or something else entirely? The agent can't identify the benefits since they can't easily see the differences between the new plan and the customer's existing plan. What happens next? Typically a conversation ensues that may or may not result in the up-sell being successful. Sometimes even the customers sell themself on the benefit, "ahhh…that would give me more monthly minutes for less money!" Fortunately, there is a more reliable way that increases an agent's likelihood of success. Imagine at the click of a button the agent quickly sees a delta view between what the customer has today, and what the new plan offers. Now picture this in context of that particular customer's particular profile so that the agent can specifically highlight 2 or 3 specific benefits directly. Now all the agent does is communicate the benefits (not just the features!) to the customer in a succinct, high impact manner. The result? Up-sell nirvana, and less frustrated agents and customers.

Challenge:
Increasing up-sell success rates by enabling agents to sell benefits, not just features.

Best Practice:
Use the delta approach and focus on benefits when up-selling. Use technology to reduce the time an agent needs to identify differences between products and services. Highlight differences and associate specific benefits with each feature and customer situation. Store this information. Automate the process so an agent can view it in a single-click while live on the phone with the customer.

10. And last but not least…*__Make it fun__*!

Your call center should not remind your agents of a trip to the dentist. You know that a well-nourished, happy agent is a powerful customer satisfaction ally. Make it fun. Keep it interesting. In fact, studies have shown a very high correlation between agent satisfaction and customer satisfaction. So when it comes to deploying new applications, interfaces and systems to support your agent's job, think of ways to make it interesting and entertaining. The payback may be softer to measure, but in the long run you'll have more satisfied and more loyal customers.

Challenge:
Keeping your agents motivated, interested and satisfied.

Best Practice:
Fun sells. Make the work environment reflective of your attitude towards customers. Even better build it into your systems and interfaces that the agent uses to do their job every day. Publish

career tracks on their interface and provide a self-paced mechanism to progress. Create challenges or mini-games around promotions or customer satisfaction programs. Be creative. How about even a sub-site where agents can share stories, good and bad, about customer service experiences?

Customer Data Tells Us That a Knowledge Application Can Generate Significant ROI...

Knowledge-based applications return tangible results, enabling you to rollout more initiatives, increase customer satisfaction, and reduce operational costs. Here are some real-world results InStranet customers have achieved after deploying a knowledge-based solution across their call center:

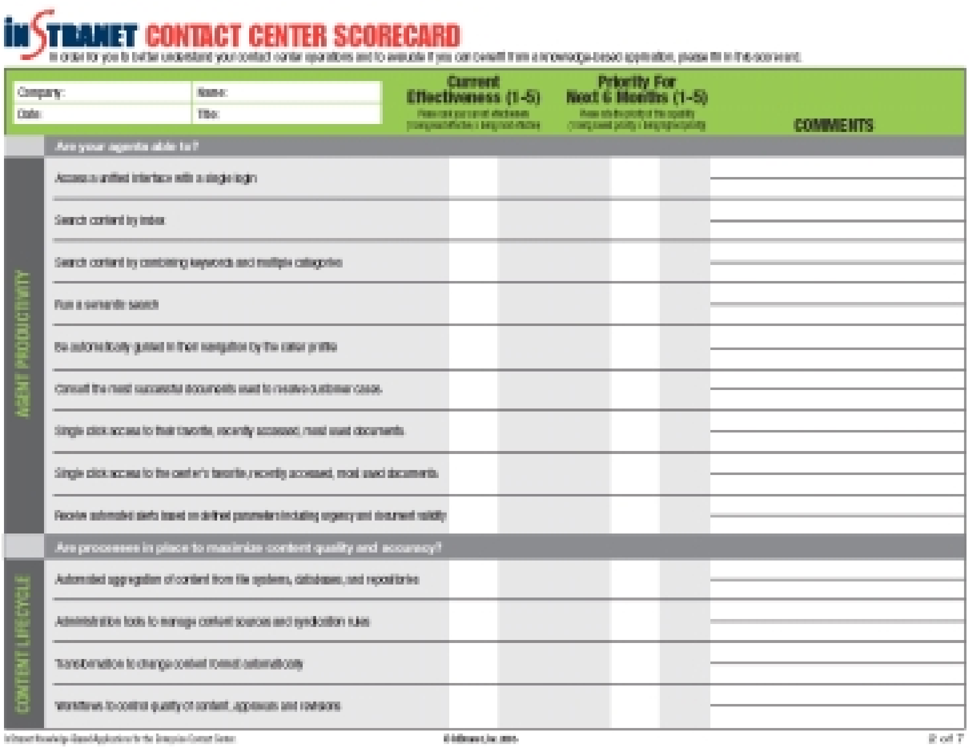
Business Metric	***Result***
Reduction of the average call handling time	***10%*** *less time*
Increase of the rate of first call resolution	***15%*** *more calls*
Agent satisfaction rates	***80%+*** *very satisfied*
Typical payback of the application (ROI)	***5*** *month payback*

... and Enables You To Rollout Multiple Business Initiatives

Contact Center Business Initiative	***Value of a Knowledge Application***
Self-Service	*Automatically extends documents and content to the Web for customer access.*
Training	*Provides a structured capability to publish training information to agents and measure awareness.*
Up-selling and Cross-Selling	*Matches promotions within the context of a customer call and automates script presentation to the agent.*
Outsourcing	*Extends product, marketing and support information beyond the firewall to trusted business partners.*
Multi-channel Service	*Coordinates publishing of content across multiple channels according to user profiles.*
Analytics and Reporting	*Measures utilization and effectiveness of documents in the system.*

Take the InStranet Content Challenge and See How You Score.

Want more information on how leading companies around the world are delivering world-class customer service using knowledge-based applications? Contact InStranet today and ask for the **INSTRANET CONTACT CENTER SCORECARD**. In less than 30 minutes you can assess your operation and pinpoint areas for improvement and ROI.



INSTRANET CONTACT CENTER SCORECARD

	Company:	Name:	Current Effectiveness (1-5)	Priority For Next 6 Months (1-5)	COMMENTS
	Date:	Title:			
	Are your agents able to?				
AGENT PRODUCTIVITY	Access a unified interface with a single login				
	Search content by index				
	Search content by combining keywords and multiple categories				
	Run a semantic search				
	Be automatically guided in their navigation by the caller profile				
	Consult the most successful documents used to resolve customer cases				
	Single click access to their favorite, recently accessed, most used documents				
	Single click access to the center's favorite, recently accessed, most used documents				
	Receive automated alerts based on defined parameters including urgency and document validity				
	Are processes in place to maximize content quality and accuracy?				
CONTENT LIFECYCLE	Automated aggregation of content from file systems, databases, and repositories				
	Administration tools to manage content sources and syndication rules				
	Transformation to change content format automatically				
	Workflows to control quality of content, approvals and revisions				

2 of 7

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