



10 Steps to a Multichannel Strategy and an *Exceptional* Customer Experience

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Introduction

As a consumer, the experience of going to a website or a local store to buy a product should not be trivial. A consumer should be able to buy a product and expect the service they need at the store, on a website, or by contacting the call center. But the reality is that many companies are failing to provide a suitable customer experience that offers these options. While the call center plays a significant role, what's new about providing a good customer experience is that consumers are becoming more demanding in their expectations. They're using many other channels, such as the smartphone and social media. Consumers want to have a worthy customer experience in any channel, anywhere and all the time.

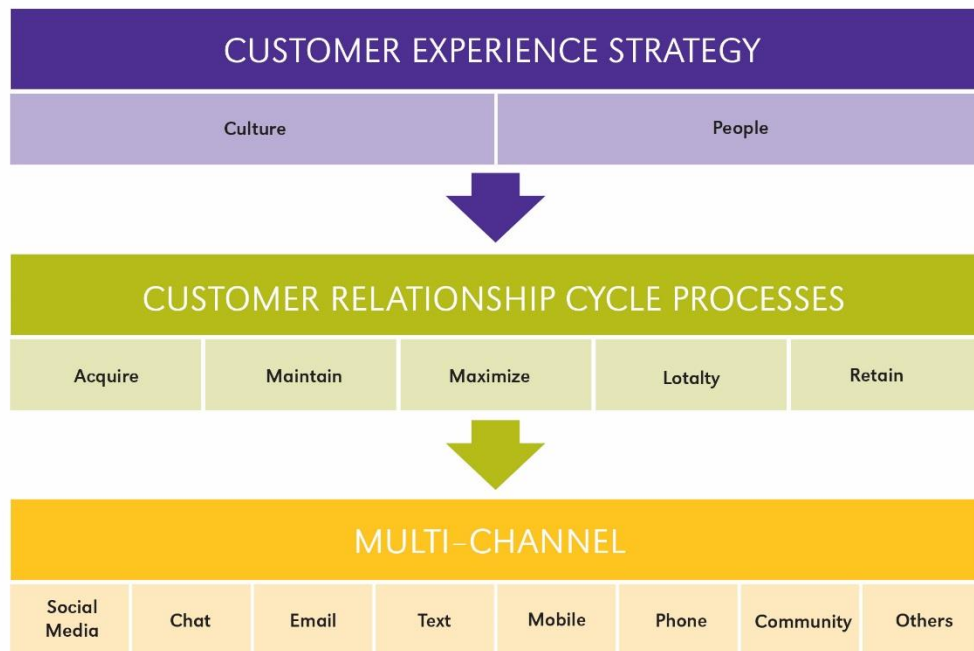
As a "customer" company (vs. a product company), the customer experience must pay attention to the customer relationship lifecycle. Companies need to use analytics and processes to better manage the customer experience.

Companies must understand how to acquire, maintain, maximize and retain customers, including how to create and keep loyal customers.

The types of channels a company must offer its customers have been changing over the past decade. While phone interactions still are the dominant method of contact, industry research indicates that the adoption of email, chat, and web interactions are now available in some form in more than 90% of contact centers. The recent surge in social media technologies is also creating even more channels for the contact center to manage. However, the level of service being offered on these other channels varies widely.

One of the mistakes companies make is to work with processes focused on products, ignoring the customer. A way to focus on the customer is to create processes that emphasize the relationship of the customer (customer relationship lifecycle):

1. **Acquire:** processes focused on acquiring prospects and consumers via marketing channels, including social networks. The focus should be in capturing the consumer's interest in products and services.
2. **Maintain:** processes for managing consumer expectations and fulfilling promises according to the characteristics of the products and services the consumer purchased. This includes quality of service, time waiting in the contact center, product warranties, claims and solution of problems, calls, letters and emails, satisfaction surveys, and so on (all activity to keep the customer satisfied).
3. **Maximize:** "up-selling" and "cross-selling" processes to look for opportunities to increase the "wallet share" of the consumer. This takes into consideration getting referrals and recommendations from the consumer.
4. **Loyalty:** processes to increase the purchasing power of the consumer. This requires implementing loyalty programs or consumer programs based on the segmentation strategy from the company. It is very key to understand who your best consumers are, who your frequent buyers are, and which customers are not your best customers.
5. **Retain:** processes to prevent consumers from leaving (churn) or processes to let the consumer go. The idea here is that the processes of retention should be very minimal — assuming that the processes for maintaining and maximizing consumers are effective. Collection processes can also be part of the retention strategy.



As shown in the figure here, a customer experience strategy needs to work together with customer processes that support the multichannel effort. This implies the need of analytics and business process that are working together. For example, when a consumer has problems with a credit card statement, the person has several options:

- 1) go to the website of the bank or financial institution for self-service,
- 2) place a call to the call center and get the balance via the IVR,
- 3) send a text to the system to get the balance,
- 4) access the balance through an iPhone (mobile) application,
- 5) call the call center and press 0 to speak with the operator, and finally,
- 6) go to the branch location close to home or work.

If any of these interaction options don't work in resolving the problem, the consumer goes to Facebook or Twitter to complain.

As demonstrated, the bank provides six (or more) channels to manage the relationship with the consumer. Some channels are low-cost, such as self-service, and others are more effective such as the phone. Because we don't know the consumer, we start implementing strategies to migrate consumers to self-service channels, where this migration can leave customers dissatisfied. This becomes more critical when we're in the era of the multichannel engagement, where the consumer dictates how to use these channels.

In this multichannel model, the processes, people, technology, culture, and information (including analytics), must work together so that nothing fails in the customer experience. The customer experience process can range from ordering a product on the website to calling for a refund or claim. During this process, the call center plays an important role in optimizing operations. This goes beyond having an IVR, CTI and/or monitoring the client call with the agent. It is about having a complete multichannel strategy throughout the cycle of the relationship with the consumer, not just managing the consumer by one channel or specific product or department or type of call center.

10 Things to Consider When Building a Multichannel Strategy

Many metrics have been implemented in call centers, from Net Promoter Score to COPC Inc. But at the end of the day, the call deflection rate (move consumers to low-cost channels) is one of the most important metrics. How do you keep the cost down in your call center and still provide a good customer experience? We have compiled a list of 10 things that, when they work together, can improve the customer relationship lifecycle by helping to create a better multichannel engagement.

Note: We've taken into consideration that your company might be a small business or a multinational, which can deploy a call center under an outsourcing or BPO model, in any geographic location, for any customer segment.

1. Have a “data filter” for all channels

The increase of conversations on social networks is forcing companies to provide social customer service in the call center. Some outsourcers call this “non-voices services” or “social command centers.” The problem with this is that, in order to have a multichannel engagement, companies need to have a “data filter” strategy. Social media noise needs to be filtered by a distinct set of criteria — from influencers to sentiment, and from trends to categorization of conversations. The increase of social conversations needs to be supplemented with workflow and business process so that conversations are managed with different channel options. However, not all Twitter or Facebook conversations need to end up in the call center. If you do, you'll increase the cost of the operation. Keep in mind that we do this today with the IVR in the call center. Therefore, the “data filter” needs to happen not just with social media but also with all the other channels.

2. Improve website traffic and page views

Callback, co-browsing, chat, and email are key factors to increasing the number of page views on your website and conversion rates. Companies must be mindful that the functionality needs to be interwoven with any site analytics and/or marketing automation tools being used, especially with your social media efforts. If the agent already knows via the “data filter” that a consumer had a positive conversation on Twitter and the same consumer is now visiting the site, the agent is better prepared to engage the consumer via chat or co-browsing — a superior customer experience for the consumer.

3. Implement a knowledge base

Companies have the challenge of organizing and providing content to the consumer; content that will help consumers resolve problems. This content has different forms: FAQs, how-to's, comments, documents, videos and podcasts, among others. The content needs to be organized in a knowledge base, with articles of information classified by channel and type of problem (other criteria is also used). Consumers can enhance the articles, collaborate with solutions, and provide “expert” knowledge to help other consumers, hence, decreasing customer support costs.

4. Use mobile applications

The personal computer is no longer the king to access the Internet. Tablets and smartphones are taking over, meaning the multichannel strategy must include the integration of mobile applications. There are two types of mobile applications to consider: 1) applications that can lower the cost of customer service, such as being able to “Face Time” with the consumer to help troubleshoot the problem, and 2) applications that provide content and transactions so the consumer doesn't need to call the call center. One added value to both scenarios is to provide a way for the consumer to chat, call, or email directly from the application.

5. Integrate the call center with forums and communities

There are many public forums (i.e., Yahoo! Answers, YouTube) and blogs that provide content that isn't provided by companies on their website. The reason for this is that most portals or self-service sites provide static content that has no knowledge base incorporated. Also, many of these sites provide content that does not take into account consumer reviews, collaboration, or feedback. Companies must consider the use of their own forums and communities to use them as part of multichannel strategy. Yes, your own community should be part of the call center to allow collaboration between them and improve the call deflection rate; and at the same time, increase page views and the number of advocates.

6. Establish business processes and workflow

"Data filters," channels, integration points, customer data, and the knowledge base all need to work together to offer a suitable customer experience, particularly when you want to enforce processes to maximize or maintain the relationship with consumer. In order to work together, you need a "business process platform" that will help synchronize all transactions and business rules in the call center.

7. Use technology that is agile in the cloud or on-premise

The market is in constant change and companies should be able to adapt quickly to the market in any geography. Flexibility and agility to provide service via any type of call center is key (i.e., collections, sales, support, BPO, etc.). It means that you need deploy any type of call center technology quickly in the cloud or on-premises, in any geography, for any channel and for any customer segment.

8. Use technology that has all-inclusive functionality

Best-of-breed technology is key for some types of companies that need vertical solutions. But when companies need turnkey solutions for specific markets or geography or subsidiaries, the all-inclusive call center functionality becomes a competitive edge. Having basic technology such as workforce management, monitoring, IVR, recording and outbound dialer, all in one platform, will help to enhance the customer experience and to speed deployment of the technology.

9. Implement unified communications

Being able to combine voice, data, instant messaging, queues, emails, processes, workforce management, routing, and quality control is key to managing the customer relationship based on common analytics and reports. This gives companies the advantage of fast deployments and helps in providing one source of reporting on a single platform.

10. Go beyond CTI and IVR, integrate the CRM application

Typically CTI and IVR processes are the most common way to integrate CRM (or ERP) systems with the call center. But companies need to be more effective in providing CRM data to the call center agent. They need to incorporate customer metrics, surveys, and a 360-degree view of the customer and business logic. The more customer data the agent has, the better equipped they are to assist the consumer.

Where Do I Start?

Technology is moving very fast compared to the business strategy. Companies need to be agile in providing a good customer experience, and the technology can be a big enabler. But the question is, where do you start to implement any of these 10 recommendations? Here are our suggestions to get you started:

- 1) Educate your company in the latest trends and methodologies in the customer experience. Be sure to include non-contact center groups (Marketing, Sales, IT, etc.) in this part of the process.
- 2) Assess the culture and processes of your company to see where our recommendations fit in relation to your business needs. Include the same groups you used in step 1.
- 3) Validate what had worked and had not worked before with technology and the customer experience.
- 4) Gather requirements based on the processes related to the customer relationship cycle.
- 5) Set objectives, goals and metrics.
- 6) Prepare an action plan and select the call center technology.
- 7) Start a pilot program.
- 8) Implement in phases.
- 9) Validate results and learn from each phase.

As you start evaluating the need to add other channels, make sure you also address the core communications platform already in place. A common mistake is trying to add other service channels into an infrastructure that was never designed to efficiently handle them.

In the end, a customer experience strategy is all about the culture of the company. However, companies must lead by using technology to deliver a differentiator in the market.



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Jesús started his CRM career as consultant in 1990 at Data Code, now SemaTree, a CRM software vendor. He is Partner and co-founder of Solvis Consulting, a consulting firm that specializes in providing services in the execution of Customer Relationship Management strategies. At Solvis, he has worked with high profile international companies in Canada, the United States and Latin America executing CRM strategies and implementing many business solutions.

Throughout his career Jesús has assisted clients, vendors, and team members with business processes, requirements, project management, quality assurance, business cases and best practices. Before founding Solvis, he was the Regional Domain Partner for Customer Management Solutions in Latin America for Cambridge Technology Partners. Jesús is co-founder of Customers Forever, LLC, a company dedicated to promote CRM in Latin America, and also co-founder of the Social Media Club Mexico City.



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