SJS SOLUTIONS, LLC

Omni-Channel Strategy – Case Study
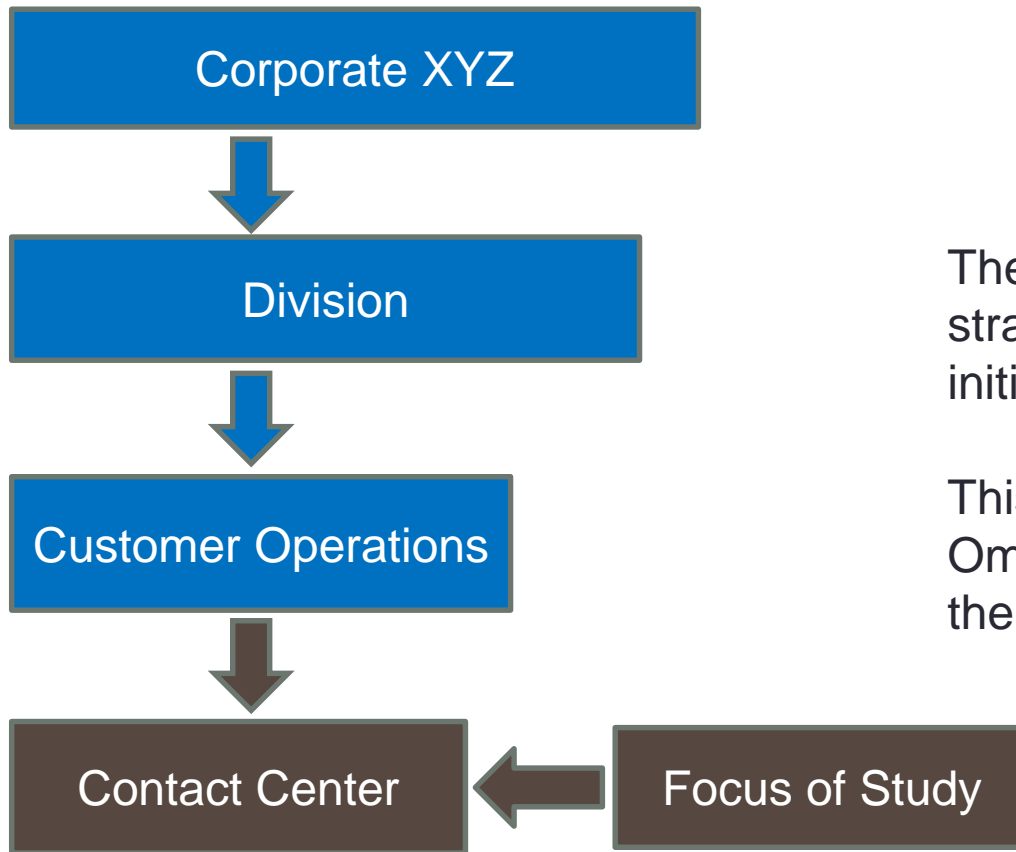
Company XYZ

SCTC Annual Conference

September 26, 2018

Topics

- **Background**

- Multi-Channel vs. Omni-Channel

- The Journey From Multi-Channel To Omni-Channel

  - 3-Prong Approach

  - Improve Current Channels

  - Add New Channels

  - Establish Support Structure

- Questions

Focus of Study – Contact Center

Corporate XYZ → Division → Customer Operations → Contact Center ← Focus of Study

The Omni-Channel strategy is a corporate initiative.

This study focuses on the Omni-Channel strategy for the Contact Center

Topics

- Background
- **Multi-Channel vs. Omni-Channel**
- The Journey From Multi-Channel To Omni-Channel
    - 3-Prong Approach
    - Improve Current Channels
    - Add New Channels
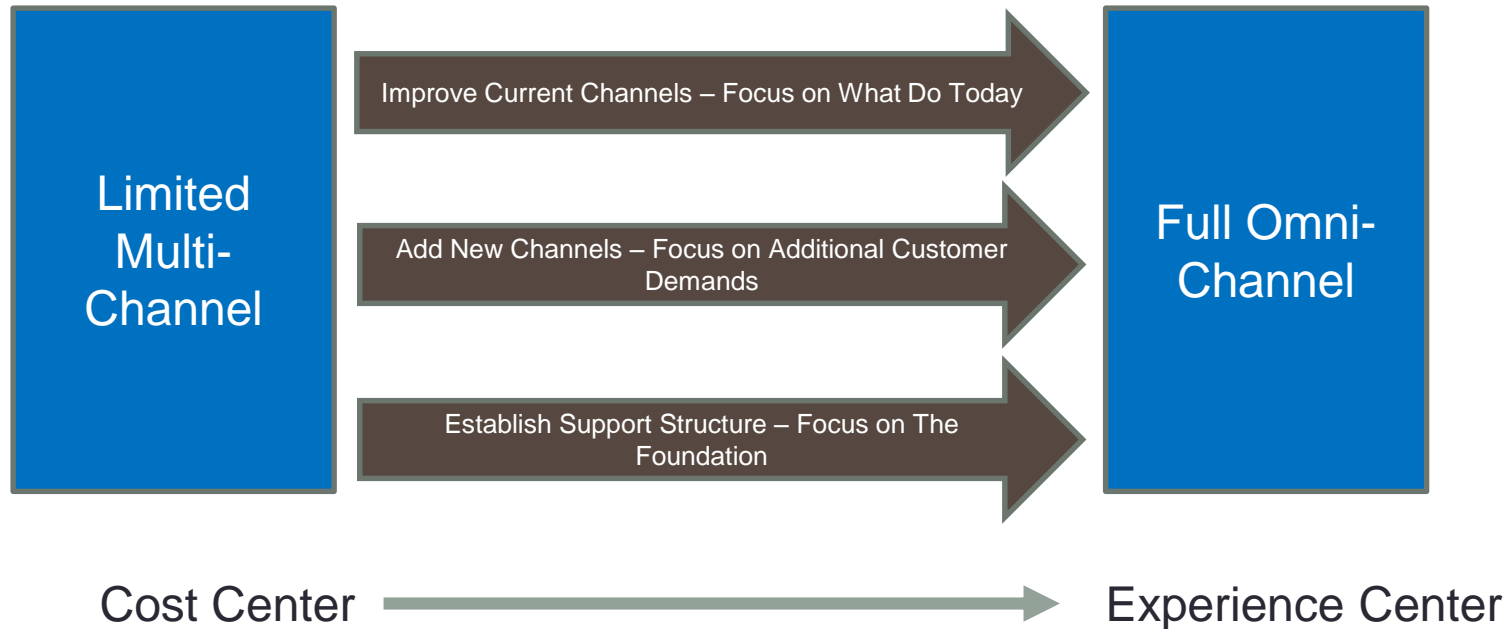   - Establish Support Structure
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The Difference Between Multi-Channel and Omni-Channel

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  - **3-Prong Approach**
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3-Prong Approach

Limited Multi-Channel → **Full Omni-Channel**

- Improve Current Channels – Focus on What Do Today
- Add New Channels – Focus on Additional Customer Demands
- Establish Support Structure – Focus on The Foundation

Cost Center ⟶ Experience Center

How Far To Go On Journey?
- **Marginal Benefit**
- **Marginal Cost**

3-Prong Approach

Current Channels Will Remain Significant

Channel A

Channel B

Channel C

Channel D

Customers Are Asking For Additional Channels

People

Requires A Strong Foundation

Process

Technology

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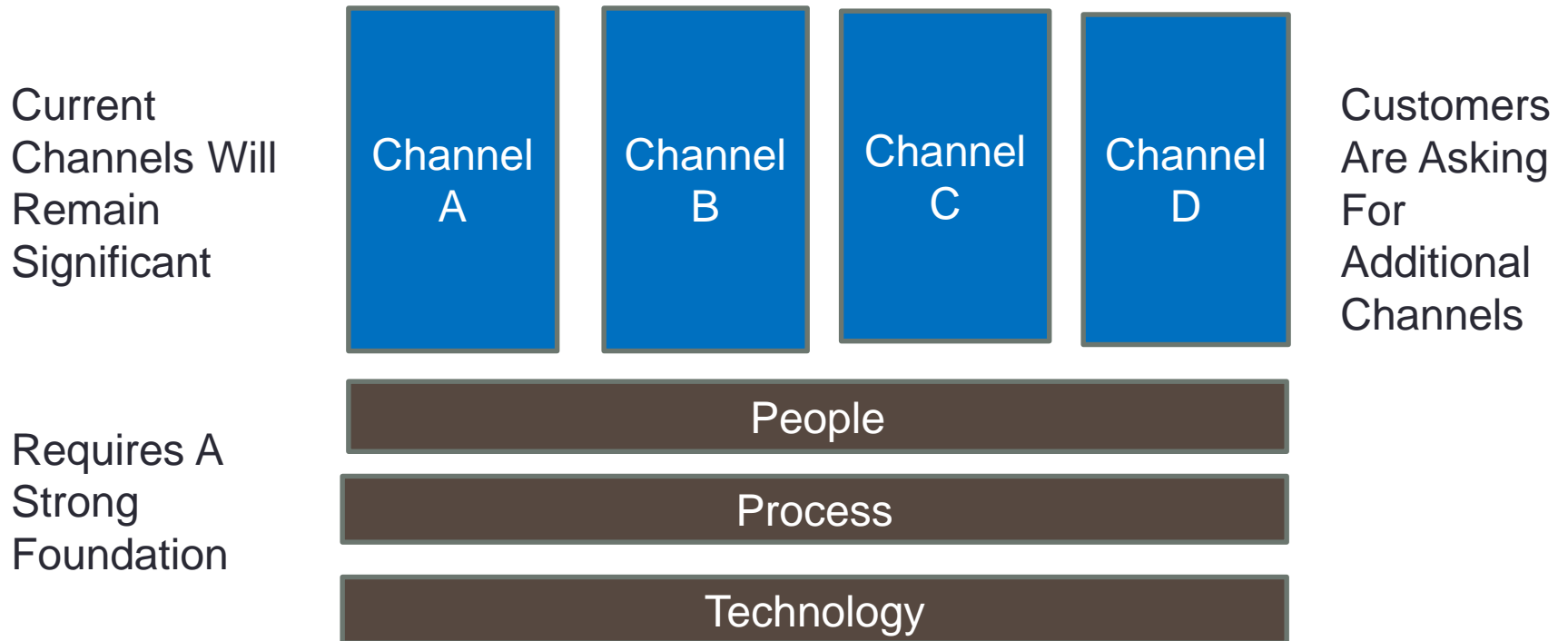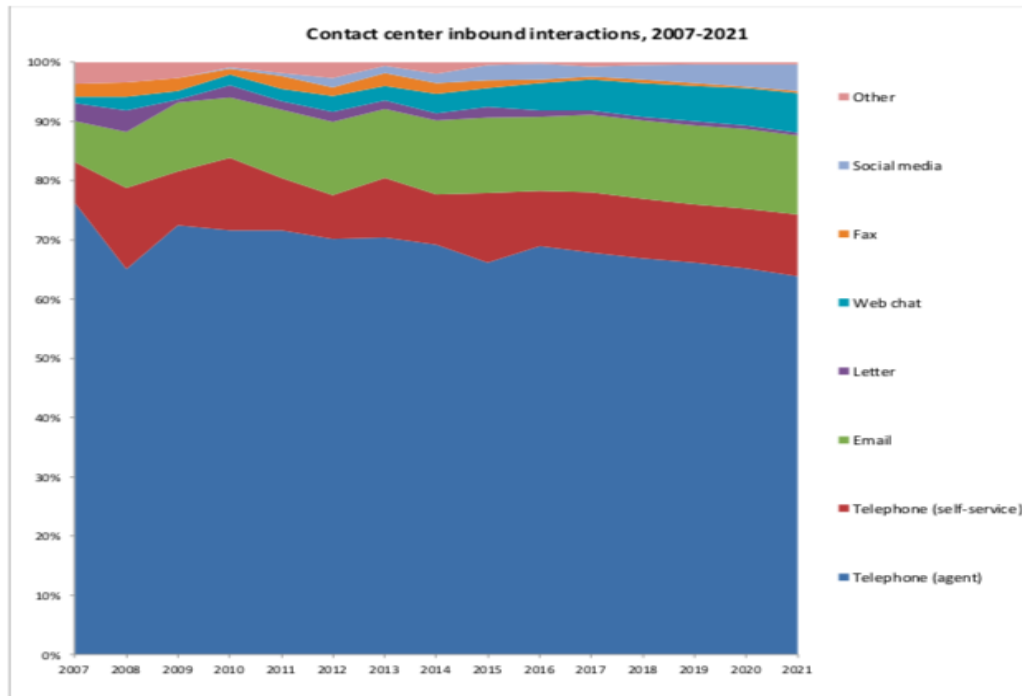 - Establish Support Structure
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Improve Current Channels - Contact Center Inbound Channel Trends

Figure 1: Contact center inbound interactions by channel, 2007-2021 (projection)

Contact center inbound interactions, 2007-2021

During the past few years, there has been a change in the mix of contact center inbound channels. There has been a downward trend for telephone and upward trends for email, chat, and social media.

Even with these trends telephone, email and telephone self-service continue to be the prominent inbound channels; accounting for 90% of inbound customer interactions for each year of the study and will likely continue to account for the vast majority of inbound customer interactions for the foreseeable future.

According to a study by the Northbridge Group: Overall, consumers prefer phone, especially for handling critical issues such as resolving a time-sensitive problem, handling a billing or payment question, asking a service or product question, and making changes to an account. The tougher the issue, the more consumers want a live resource who can provide immediate assistance.

Channel	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2021
Telephone (agent)	76.2%	65.0%	72.4%	71.6%	71.6%	70.2%	70.4%	69.2%	66.2%	68.9%	67.8%	63.8%
Telephone (self-service)	6.9%	13.8%	9.2%	12.2%	8.9%	7.3%	10.0%	8.5%	11.7%	9.4%	10.2%	10.5%
Email	6.9%	9.4%	11.6%	10.2%	11.5%	12.4%	11.7%	12.5%	12.7%	12.5%	13.1%	13.3%
Letter	3.0%	3.6%	0.5%	2.1%	1.4%	1.7%	1.4%	1.2%	1.8%	1.1%	0.7%	0.5%
Web chat	1.2%	2.4%	1.4%	1.8%	2.1%	2.7%	2.5%	3.2%	3.2%	4.5%	5.3%	6.7%
Fax	2.1%	2.4%	2.2%	1.0%	2.2%	1.4%	2.1%	1.8%	1.3%	0.6%	0.4%	0.3%
Social media	0.0%	0.0%	0.0%	0.2%	0.4%	1.6%	1.3%	1.6%	2.6%	2.7%	1.8%	4.5%
Other	3.7%	3.4%	2.7%	0.9%	1.9%	2.7%	0.6%	2.0%	0.5%	0.3%	0.7%	0.4%

Source:
The Inner Circle Guide to Omnichannel Customer Contact
ContactBabel 2018
Sponsored by Seranova

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Improve Current Channels – Focus on High Priority Findings/Recommendations

The contact center supports the 3 largest channels identified in the previous study for the majority of their customer interactions. It is essential that the contact center continues to improve current practices in these 3 channels along with web self-service, driving continuous improvement and supporting the transition from a "Cost Center" to an "Experience Center" which is a component of the omni-channel strategy.

| Channel	Total High Priority Findings/Recommendations	Estimated Implementation Timeframe – 0-60 days	Estimated Implementation Timeframe – 60-180 Days	Estimated Implementation Timeframe – 180+ Days
Inbound Phone	6	3	0	3
Email	3	1	1	1
Self-Service – Voice Response	6	3	3	0
Self-Service - Web	2	1	1	0

Improve Current Channels

High Priority Findings/Recommendations (Sample)
- Inbound Phone
  - Reduce dial transfers
  - Improve system stability and response time
  - Reduce usage of temporary employees
- Email
  - Improve response time
  - Implement QA program
- Self-Service – Voice Response
  - Improve speech recognition capabilities
  - Improve routing
  - Improve reporting
- Self-Service – Web – used as portal to Email
  - Improve capabilities available but not used
  - Add additional capabilities

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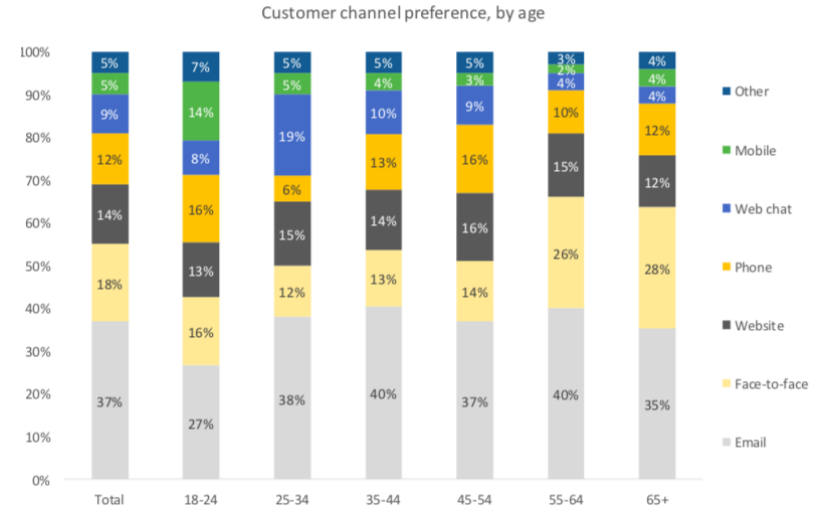 - Establish Support Structure
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Add New Channels – Industry Trends

What is the next channel that you will add to your contact centre?
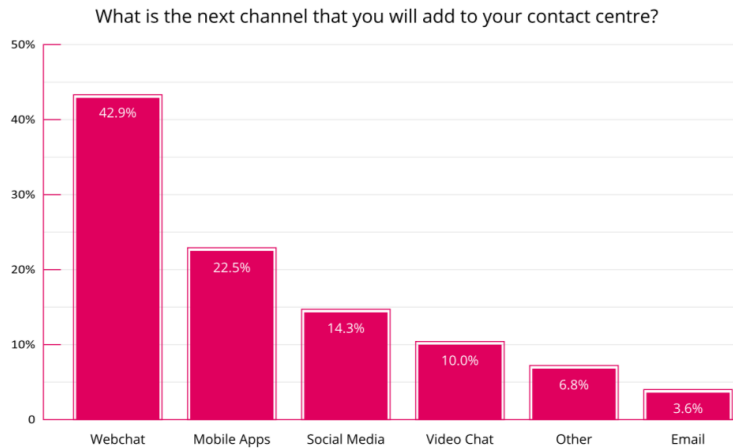
Source:
What Contact Centers Are Doing Right Now (2017 Edition)
A Call Centre Helper Research Paper
Sponsored by Seranova
https://www.serenova.com/sites/default/files/cch-what-ccs-are-doing-right-now-2017-serenova.pdf

Customer channel preference, by age

Source:
The Inner Circle Guide to Omnichannel Customer Contact
ContactBabel
Sponsored by Seranova
https://www.serenova.com/sites/default/files/cb_omnichannel_16-report-contact_babel-serenova-v2.p

Webchat by the largest margin, and Mobile Apps by a smaller margin are the leading candidates to be added as new channels of communication (other surveys show similar results).

Different age groups prefer different channels of communication (this study was performed in the United Kingdom, the belief is the results in the United States will be similar). Key observations include:
- Mobile (includes SMS) is significant for the 18-24 group
- Web Chat substitutes for phone for the 25-34 group
- Email is significant for the groups over 25
- Face to face drops for the groups under 55
- Phone is the most significant channel for the 35-54 groups

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Add New Channels – XYZ Customers

Company XYZ has developed 10 personas with a wide range of characteristics to represent their customer base

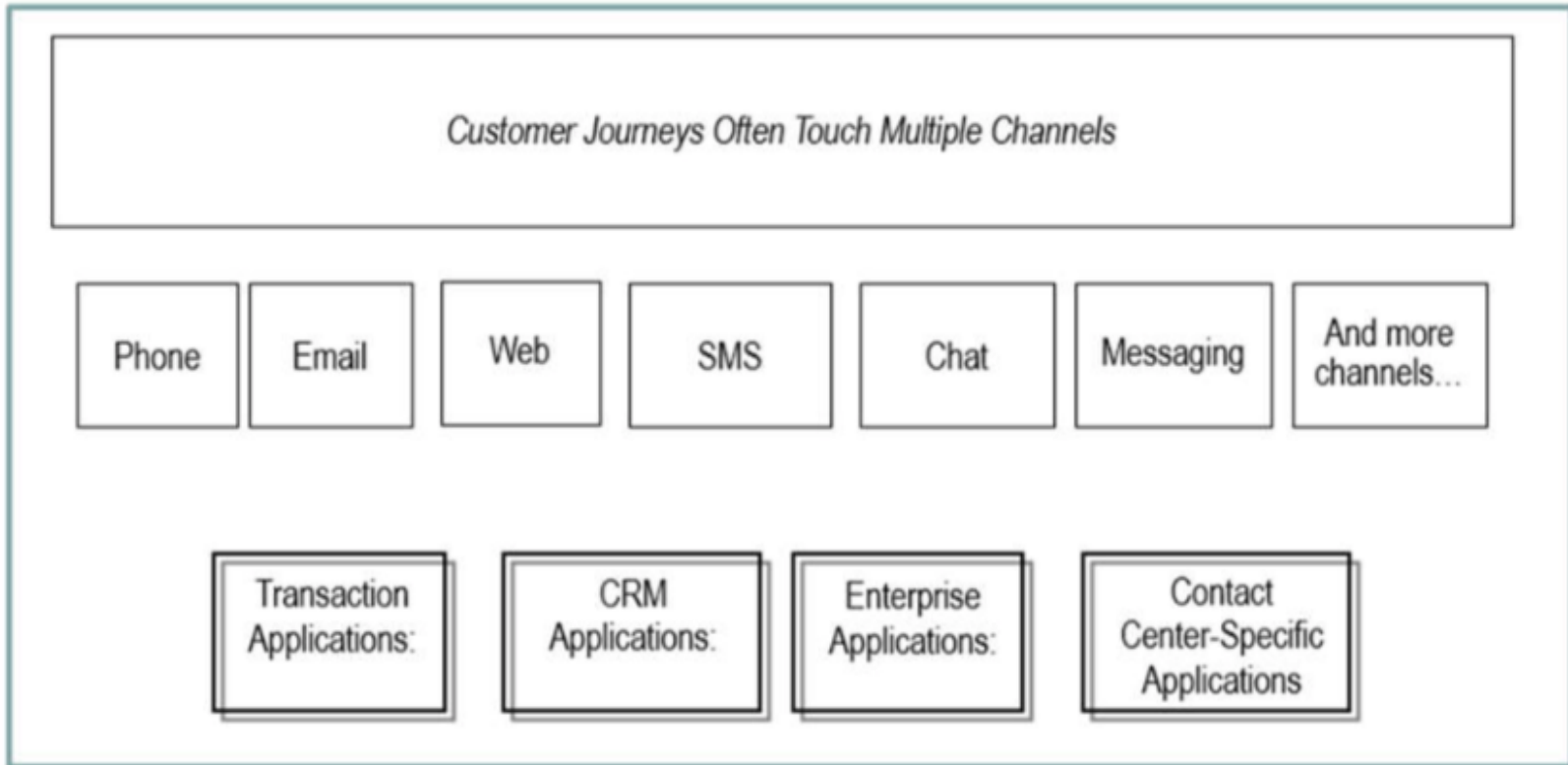| Channels Requested By Callers	Channels Not Requested By Callers
Chat	Visual IVR – call contact center and receive
Mobile App	SMS with link to visual IVR on phone
SMS – from a notification perspective, not	Video Chat
from a conversational perspective	Expansion of Social
	Collaboration
	Kiosk

Add New Channels

- Chat
  - Hire/Train agents
  - Establish SLAs and reporting
  - Manage agent utilization
  - Etc.
- Mobile App
  - As effective as web site
  - Utilize notification capability
  - Allow customers to access customer service
  - Etc.
- SMS - TBD
  - Decide on one-way or two-way
  - Utilize notification capability (must be careful)
  - Establish SLAs and reporting
  - Etc.

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Establish Support Structure – Focus on Contact Center Specific Applications

Customer Journeys Often Touch Multiple Channels

Phone | Email | Web | SMS | Chat | Messaging | And more channels…

Transaction Applications: | CRM Applications: | Enterprise Applications: | Contact Center-Specific Applications

Establish Support Structure – Contact Center Specific Applications

- **Contact Routing System**
- Voice Response
- Speech/Text Analytics
- Workforce Management System
- **Knowledge Management System**
- **CRM System**
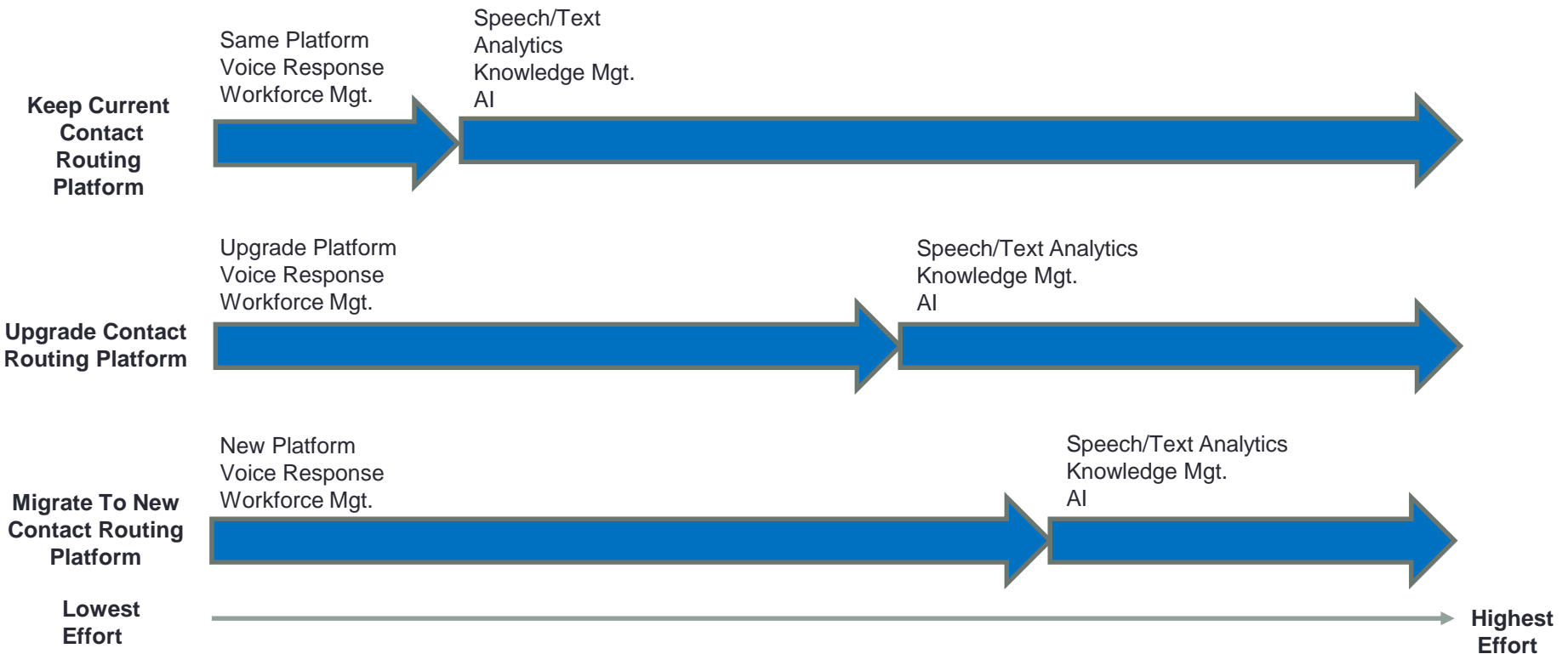- **Artificial Intelligence**

Establish Support Structure – Key Systems

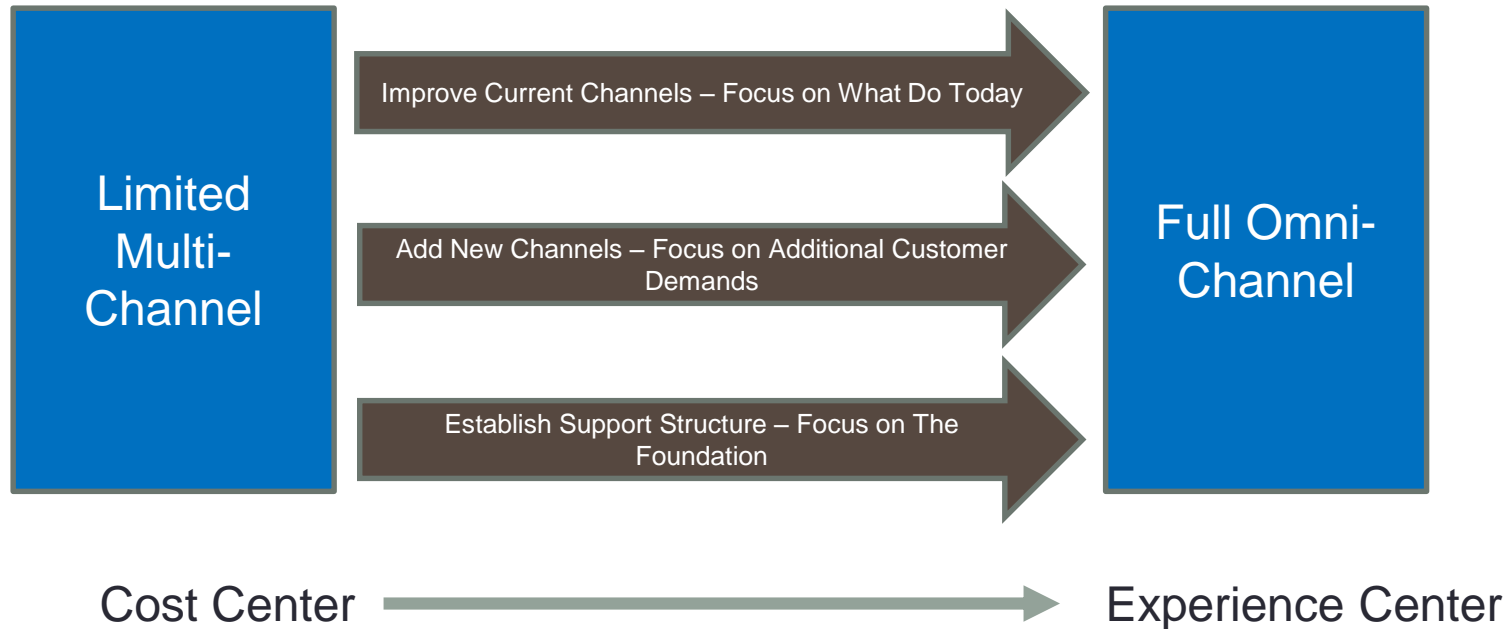|	Current Status	Goal	Timeframe For Next Steps (Not Full Solution)	Next Steps
Contact Routing System	Inbound Phone – System A Outbound Phone – System B Email – System C	Single system for the automated routing of all customer contacts to appropriately skilled agents.	High (0-60 Days)	Develop business requirements. Work with A to understand current platform and future roadmap. Possibly consider other platforms.
Knowledge Management System	Source 1 Source 2 Source 3 Source 4	Single repository that organizes information in a manner that is easily accessible and understandable. Building block for Artificial Intelligence.	Medium (60-180 Days)	Develop business requirements.
CRM System	System D – used to capture customer interactions that occur via phone and email with an agent.	Single system that captures the entire customer journey including, but not limited to every service interaction.	Low (>180 Days)	Develop business requirements. Understand capabilities of System D for tracking all customer interactions. Possibly consider other platforms for this specific function.
Artificial Intelligence	None	Automated tool that optimizes self-service capabilities along with the routing of customers who require the assistance of an agent.	Low (>180 Days)	Hold until the maturity of AI in the contact center space improves. The implementation of a Knowledge Management System is a key building block as this technology matures.

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Establish Support Structure – Effort Scale

Keep Current Contact Routing Platform

Same Platform
Voice Response
Workforce Mgt.

Speech/Text
Analytics
Knowledge Mgt.
AI

Upgrade Contact Routing Platform

Upgrade Platform
Voice Response
Workforce Mgt.

Speech/Text Analytics
Knowledge Mgt.
AI

Migrate To New Contact Routing Platform

New Platform
Voice Response
Workforce Mgt.

Speech/Text Analytics
Knowledge Mgt.
AI

Lowest Effort ——————————————————————————→ **Highest Effort**

Depending on the decision regarding the current platform A, there are numerous other technology decisions that need to be made and the level of effort to implement these additional technologies will vary as a result of the contact routing platform decision. Detailed business requirements must be developed for each technology capability and then it must be determined whether the incremental benefit outweighs the incremental cost (money, time, effort, etc.) for each potential solution.
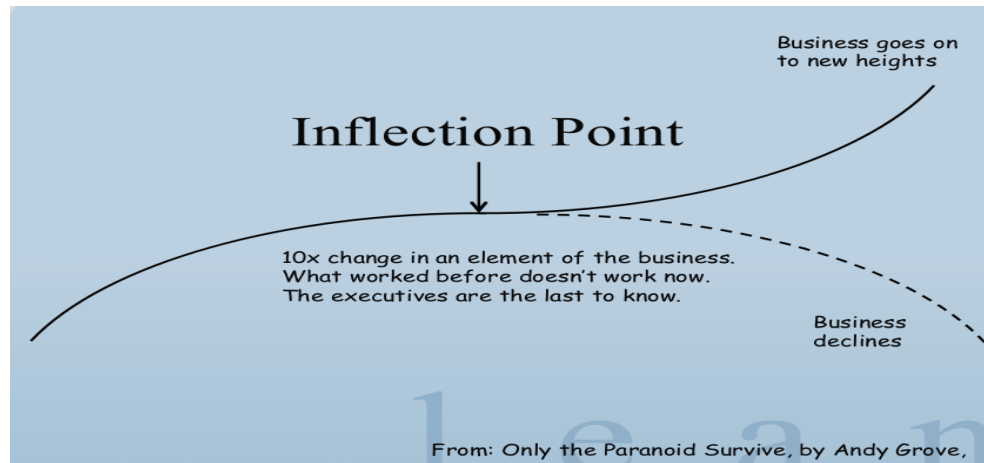
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3-Prong Approach

Limited Multi-Channel	Improve Current Channels – Focus on What Do Today → **Full Omni-Channel**
	Add New Channels – Focus on Additional Customer Demands →
	Establish Support Structure – Focus on The Foundation →

Cost Center ⟶ Experience Center

How Far To Go On Journey?
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SJS Solutions, LLC

A provider of highly effective solutions to Contact/Call Center organizations that are at an inflection point in their Customer Service Lifecycle.

Inflection Point

Business goes on to new heights

10x change in an element of the business. What worked before doesn't work now. The executives are the last to know.

Business declines

From: Only the Paranoid Survive, by Andy Grove,

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