

Anticipating the needs of your customers is much more than a quick review of past orders, quotes, and service requests

Benefits

The overall time to service customer requests will decrease substantially

Empower your representatives and self-service systems with timely data, resulting in a reduction of repetition and redundancy

“Do your representatives have visibility to the various self-service attempts your customers tried minutes ago?”

“Can your representatives anticipate the needs of your customers before calls connect?”

“Are your customers asked for the same information after various IVR attempts and transfers?”

Challenge

Companies have been attempting to empower their representatives with relevant and timely customer information for over two decades. The more we know about our customers the greater our intuition becomes.

Unfortunately the number and diversity of interactions make it increasingly difficult for representatives to anticipate their needs. Ultimately the experience of the customer, repetition, and the overall time to service requests begin to degrade.

Effort

The process begins by assessing the value of the data contained in the Customer Relationship Management (CRM) or Customer Information System (CIS) platform. Scenario driven testing reveals relevance and depth. Additional sources of customer data are uncovered. These sources may include but are not limited to cases, tickets, attempted requests, searches, URL trails, peripheral data, interactions (calls, email, web-chat, IVR, SMS, automated outbound, other – transactional and transcript), forums, and social media.

Business cases are formed, user interfaces are created, the new sources of data are absorbed into your CRM or CIS system, and training is conducted. Reports, key performance indicators, and dashboards are developed to analyze and trend the data from a centralized viewpoint.

Results

Representatives and self-service systems have a holistic insight throughout the entire journey of a customer. Examples include;

- Self-service, internet order, or automated outbound attempts are recorded and displayed for the representative.
- Last week's web-chat, inbound SMS, or IVR session is available for review before a proactive call is placed.
- A product search, automated email reply, or web requests are reviewed prior to completing a quote.

Customers are serviced faster with less redundancy and repetition. The process of selling and servicing the customer is reduced. Customer satisfaction increases as their overall time to service shortens. Either average handle time decreases or the value of the interaction increases.

Leadership can analyze the various sources of data in comparison to orders, quotes, cases, and other requests. Examples include;

- Average number of interactions required to convert a quote to an order
- Ratio of missed appointments to automated outbound SMS
- Percentage of customers who chat after attempting an internet order
- Number of email interactions per case/service request

A 360-degree view of this data is the basis for clear, timely, and intuitive decisions.

Summary

The connection between your data sources and customer systems will provide a competitive advantage. Those who create a symbiotic relationship between the data and their customers will increase productivity and decrease their overall time to service. Every data source will ensure contact history, product data, and other transactional facets of the relationship are available for use. The natural progression is to wrap business logic around this data to preemptively offer and decide what to present to customers throughout all interactions, self-serving or human.

Considerations

Consult with a resource that has the vision and prior experience to design and implement an intuitive strategy of the customer.