Whitepaper

The Last Mile in CRM

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INTRODUCTION

Customer Relationship Management applications have delivered their maximum productivity levels, and businesses look to improve the customer experience by closing the gap from what CRM can provide to what their customers want and what their businesses need. Tracking and managing interaction records closes that gap for both agents and for executives.

CUSTOMER RELATIONSHIP IN A CONTACT CENTER

Customer Relationship Management solutions are widely used within contact centers, and track almost all aspects of a customer's relationship with a business. They have provided value in consolidating customer facing data into one location, tracking meaningful outcomes and events, and predictively helping agents improve customer service and sales through targeted offerings.

However, the true test of CRM happens most often in the contact center, where agents aren't dealing with an over-arching customer relationship. They are instead dealing with specific customer events that are happening right now between them and the customer. That interaction may have a defined business outcome and might be captured by the CRM system – or it may be just one more call in a string of interactions that makes up the overall sales or service process, with no defined business outcome.

Without this defined business outcome, existing CRM solutions are weak at providing consistently accurate and actionable information. They are implemented with the needs of the business in mind – but focused on sales or marketing, rather than on the specific and unique needs of a contact center agent. In a recent Ventana Research report, it is recommended that businesses use products and solutions that specifically address the management and tracking of interactions.

Individual interactions are the atomic units that make up the substance of the relationship, and agents are tasked with dealing with these interactions, without visibility into the previous history. Customers expect that the agent they are dealing with knows what they already know - not only that they have purchased $45 worth of goods in the last month, but also that they contacted the business last week to inquire about pricing on a new product, but didn't buy it. Customers expect that the agent they are speaking with knows at least what they know about the relationship – including an accurate history of any interactions they have had.

THE AGENT INTERFACE GAP

Attempts have been made at providing this type of information to agents, but without creating an interface that is role tailored to how an agent operates - allowing them to not only quickly and accurately collect the information they need, but to use it easily on subsequent interactions – they will continue to deal with CRM information that is incomplete or out of date. Agents are asked to deliver consistent service to customers who are increasingly expecting knowledgeable service from busy contact centers, but with inconsistent or incomplete information. And although CRM has the ability to provide value to that agent, it doesn't cover that last mile – the gap between what the business wants to know about the customer and what the customer thinks the business should know about them.

The solution to this conundrum is to ensure that whichever agent gets an interaction, they have the complete and accurate history of that customer's dealings with the business. And this means that tracking the interactions a customer has with your organization – regardless of channel or destination –

should be as important a function of your CRM as is maintaining those business outcomes and customer profiles.

Consider the CRM benefits listed in the first paragraph of this paper – consolidation of data; tracking of meaningful outcomes, and predictive upsell. Two of these – consolidation of data and predictive upsell – are internal benefits that don't specifically improve customer satisfaction or affect the customer experience. Since the customer simply wants resolution and to feel their patronage is valued, they want the agent to "remember" them when they call – and recall what interactions they've had with the company, not just what they've bought.

CUSTOMER SYSTEM OF RECORD

Properly implemented, CRM becomes the customer's record across the entire business, not just within the contact center. However, too often, the manual interaction tracking that occurs in the contact center is the best that's done in terms of understanding how the customer interacts with you. Since agents are still tasked with moving through the contact as quickly as possible, information that is captured on sticky notes is lost and electronic notes are skipped to improve handle times.

Web self-service interactions that don't result in a sale (for example, an abandoned shopping cart), social media interactions that result from poor customer service, or even retail interactions are not captured as part of that relationship – even though these interactions are key components of the overall customer experience. As a result, agents are left without the information they need to succeed in providing the best possible service. Imagine if you contacted a business, and the agent knew not only that you called yesterday, but that you had subsequently gone online to look at pricing for an item. Implementing proper interaction tracking with a CRM system provides the capabilities that help you not only meet today's customer expectations, but gives you the potential to exceed them.

Closing that last mile in CRM helps agents improve their service and ultimately reduces costs and improves customer satisfaction, but these are only the 'up front' benefits of accurately capturing this information. The real benefit is when you start to use the context of every interaction to truly understand how your contact center is operating, what's driving customers to contact you, and how well your agents are handling those requests. Designing a model for how to use the information you are collecting ahead of time is a critical component of a properly implemented CRM system if your intent is to use that system to not only capture the customer relationship, but more importantly, use that system to improve the customer experience and overall business operations. Too often, the analysis of collected information is done as an afterthought, and the information required is not collected, not structured, or not accessible. As a result, companies are left running operational and strategic analysis on data that isn't designed for that use - with all the inherent limitations of a poorly designed system.

By incorporating interactions into your CRM system, you are effectively creating a true "System of Record" for every interaction that you can use to increase customer engagement using:

1) Customer experience personalization – ensuring that you are tracking every interaction so that agents can easily see the entire history across all communication channels. Customers who contact your business will find that your agents 'remember' who they are and why they have previously contacted you.

(Note that this implies that you are providing a role tailored interface to your contact center agents to easily view the interaction history and associated CRM records. If the information is not quickly and easily available, then it will not be used, and this is what happens in many CRM implementations where agents are being managed on handle times!)

2) Business Intelligence and Analytics. Data mining of interaction information will provide you overall business process improvements, such as repeat contact tracking for FCR improvement, call clustering and elimination, and other business effectiveness or improvement information that will increase customer engagement and reduce operational costs.

TRACKING INTERACTION CONTEXT

This last mile of CRM is built on ensuring the steps required for fully tracking the context of the interaction and personalizing each customer experience are not skipped due to complexity and the time required for the agent to capture those steps. To ensure these critical points of a customer interaction are captured, agents can't be expected to execute complex searches or navigate multiple redundant screens. They must be given a quick and direct method to enter the data so that neither the customer nor the agent is delayed in getting what they want and need. By collecting this critical context data, agents will see an improved customer history and opportunities to serve their customers with greater insight in the future and customers will start to see that you are ALWAYS listening to them.

Interaction tracking is a concept that should be included in your CRM plans, so that your CRM implementation is designed to incorporate interaction records in a manner that will ensure agent compliance and data accuracy. Interaction tracking within your CRM will substantially change how your CRM application operates and provides significant upside value to the overall business, through personalization of every customer interaction and enhanced business intelligence based

ABOUT UPSTREAM WORKS SOFTWARE

Upstream Works provides organizations around the globe with omnichannel contact center software to increase agent success and build exceptional customer experiences. Our all-in-one, intuitive, smart agent desktop suite with seamless integration, reporting and analytics provides omnichannel interaction management and a unified view into the entire customer journey for insightful, personalized service excellence across every communication channel.

With over 15 years of award-winning, omnichannel innovation, we bring contact center expertise and a proven, market-leading solution that extends our partners' contact center capabilities. We're committed to achieving the highest standards of excellence from product design to implementation and support.

ABOUT THE AUTHOR

Rob McDougall, President and co-founder of Upstream Works has been a catalyst for change within the contact center industry for many years. With Upstream Works, he developed a successful business that provides contact center solutions to many high profile customers.

To ensure that Upstream Works continues to be a leader of innovation, Rob plays an active role in promoting the company through corporate evangelism, articles, and various speaking engagements. Rob is the author of many of Upstream Works' whitepapers.

Prior to the creation of Upstream Works, Rob held the role of R&D Director for TSB International/Telco Research, where he was responsible for product development and the tactical direction of InterLYNX CT, which served as the basis and the origins for Upstream Works' Business Interaction Management. He graduated as an Electrical Engineer from the University of Western Ontario.

FEEDBACK AND MORE INFORMATION

Thanks for reading this report. I hope that you have found some valuable information that will help you achieve your contact center and corporate goals. I welcome your comments about this white paper, and invite you to suggest other topics that you would like us to address.
My contact information is below.

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