Multi-Channel Customer Management

e-Book Series
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1. Introduction

Multi-channel contact centres, cohesive customer service strategy, consistent customer interaction experience, holistic customer view...these are just some of the buzzwords and phrases you may have heard recently in the world of Customer Service or CRM (Customer Relationship Management).

The last ten years or so have seen a steady rise in the number of consumers who are choosing to use a variety of channels to contact companies. Whilst the telephone is still the preferred method, email is now seen as one of the more traditional channels, along with web self-service.

As technology continues to make access to data easier, faster and cheaper, consumers will continue to use the channels that make it easier for them, whether it is simply because of the time of day, or perhaps the nature of their query. Companies that fail to recognise this and force customers to use one channel over another, or do not make other channels available, will often face a backlash through negative publicity, particularly on social media.

For every channel that you provide, you will have a different set of challenges, whether they are technical, agent training, personalised mass marketing, data integration and so on. But ultimately you need to know who your customers are and what they want.

This e-Book is aimed at companies who are looking to offer their customers a choice of contact methods, but are perhaps wary or unsure of where to start or how to justify the investment. This is not an exhaustive reference guide, since each channel has its own functional and technical considerations – as an example, take a look at the other e-Books in this series, such as ‘Customer Email Management’ – but it is intended to give you an appreciation of some of the more critical questions to ask within your own company.
2. How Multi-Channel Are You Today?

Offering multiple contact channels and actually offering your customers a multi-channel experience are two very different things. Here, we raise some of the questions you should be asking of your own company, which may help you to identify which areas need investment or at least close attention.

**Can you see each customer’s journey along and between channels?**
You probably already offer your customers a telephone number for customer service or support, and also have at least one public email address. If you also have a Facebook page or Twitter account then you are already providing a multi-channel experience for your customers, but just how integrated is it? Indeed, can customers actually choose their channel, or do you restrict them to the phone for sales, email for support, social media for marketing, for example?

**Are your processes consistent across channels?**
An inbound telephony agent in sales may be required to follow a script, or they may have the experience to deal with a range of queries as they see fit. Yet the same customer enquiry on email may be dealt with by a different team, may have different service levels (if any), and the customer may have a different, possibly less personal experience.

**Do you pull together customer data from all channels?**
Too many companies still have islands of data, brought about by tactical implementations of technology rather than as part of a wider strategic programme. You may have your main customer database linked to your phone system, yet customers’ emails are possibly stored in a separate database. There are bound to be multiple duplicates between the two, so how many unique customers do you have? What is their tendency – to call or email you?

**Do you have technology gaps?**
A tactically-developed customer-facing system will probably have left you with technical gaps that current require manual workarounds, even if it’s as simple as copying and pasting a customer’s account number between systems. These inefficiencies all add to agent (and customer) frustration.
3. Be Aware of all the Channels

Whilst the most common channels for your customers to contact you are probably the telephone, email and your website, it is worth taking a step back to consider where else customers can interact with your organisation.

Retail Stores
If you are a retail company, then your shops, stores or branches are contact channels, and each visit by a customer or prospect is an interaction that could be captured, analysed and possibly improved.

Texts / SMS
Text messages are often seen as a one-way (outbound) form of contact, with responses from customers typically only seen in surveys. However, if you allow or even encourage the use of text messages to and from your customers, you should take time to understand the limitations and how well this channel can address specific types of customer queries.

Faxes
Faxes fall between physical correspondence (letters) and electronic communications (emails), and many companies simply do not know how they should handle them. It is quite common for companies to put all faxes into piles at regular intervals during the day and assign them to whoever is available within the call handling team. However, this is usually highly inefficient and also tedious for the agents. Technology can help, but it can also cause problems. For example, faxes can be received by systems that store them as attachments to emails, but without the ability to apply any intelligence on the incoming transmission, the agents dealing with the faxes will simply be presented with an inbox of generic emails, all with poorly-labelled attachments. Manual intervention is then needed to identify, allocate or categorise the fax, and attach or move it to the customer’s record on your central database. And that’s before the agent has even dealt with the contents of the fax.

Social Media
We look at the impact of social media later in this e-Book, but it is important to realise that Facebook, Twitter and the like are not just for use by your marketing department. Customers are increasingly sharing their frustrations (but also their good experiences) on social media, and companies who fail to acknowledge the impact of these channels risk alienating current and potential customers.

Mobile Apps
Although fairly uncommon at the moment, application developers are starting to enable customers to contact companies directly from within mobile device applications. This may be a simple list of contact numbers which the user clicks to call, or possibly a button that directly calls the relevant department within the company, such as the Barclays Mobile Banking application.

Be Consistent
The quality and accuracy of the information your customers receive must be consistent across channels. If somebody receives a better answer by email, word will get out and your customer service inbox will take a hit. If that email discloses an individual agent’s name or direct number or email address, customers will latch on to that one agent the next time they want good service.
4. Building the Business Case

The business case for multi-channel customer systems will be different for each company, but there are some areas where you should spend some time researching the current situation and see where there are opportunities to reduce costs or improve efficiencies. These opportunities will typically fall into two areas – hard and soft benefits. A hard benefit is one where you can measure the cost of something today, and will be able to measure the costs (or savings) once a new system or process is introduced. A soft benefit is more difficult to quantify, and measurement can be open to interpretation.

Common hard benefits

- Ability to handle more calls/emails/interactions with the same or fewer agents
- Shorter agent handling times (applies to calls or emails mainly)
- Reduced paper waste (for email or fax systems, or integration to CRM systems)
- Reduction in the number of call backs (frustrated callers hanging up then calling back later)
- Increased average sales per transaction (i.e. per call, for example).

Common soft benefits

- Improved customer satisfaction
- Improved agent satisfaction (i.e. better technology)
- Increased customer retention
- Better customer advocacy
- Increased spend or better up-sell and cross-sell opportunities (typically on a phone call)
- A higher level of personalisation can strengthen the customer’s loyalty to the company or brand.
Social media can have several benefits when used and managed effectively. For a start, it is a convenient way to inform multiple users about system-wide or geographical issues, such as a telephony system failure or a local flood affecting your ability to service customers. Proactive notifications such as this can deter customers from besieging your call centre, but that aside, more customers are finding that companies are responding to questions or issues via these channels. There are the obvious issues of personal data security, so social media channels are not appropriate for all customer issues, but are certainly proving valuable to address more generic questions.

Although customers generally prefer getting answers via the same channel they asked them, sometimes it is more practical to encourage customers to other channels. For example, requests for service on Twitter may be best handled by referring the customer to a more secure channel, perhaps by giving them a unique reference number so they feel they are not just being passed off to another department. Maintaining contact with the same agent who was on Twitter but perhaps by email may help to alleviate a customer’s issues and defuse a potential complaint or poor review. Another option is to consider using private messaging such as on Facebook, but you should still be careful about what information your agents ask from customers or give out, and indeed you should continually educate your customers about what type of data they should or should not disclose, even on ‘private’ messages.

Bulletin boards and forums are in fact customer service channels, since a customer’s question can be resolved using these media, but forums are usually monitored and managed by a small group of people, and questions are typically answered by peers rather than employees of the company in question. However, forums are an excellent means of resolving technical issues whilst avoiding more expensive contact methods such as the phone.
6. Involve Your Agents

The introduction of any new technology or processes into a customer-facing environment will almost always have an impact on your customer representatives, i.e. your agents or perhaps your back-office staff – basically anyone who interacts with your customers. Even subtle changes to an inbound IVR menu could cause confusion for customers and some of those will inevitably select the wrong option for their enquiry. Whoever receives those calls needs to be aware of the changes and be able to either assist, or quickly transfer the customer to somebody who can help (and preferably not by dropping the customer into another queue if they have just been holding for a while).

Your agents and supervisors need to be involved from the start of any project in the contact centre environment. They are the people who have first-hand experience of the issues and challenges facing not only their colleagues but also your customers. They will also have a sense of ownership if their contributions are acknowledged and actively incorporated into the final solution.

Processes need to be reviewed and refined to assess the impact of any new systems. Agents will always find ways around shortfalls in customer handling processes, and these short-cuts may not be in the interest of the customer or the company. A lack of functions in technology is usually more difficult to work around, so a multi-channel solution needs to be designed from both the process and the technology points of view.

Recruitment and training of agents should consider the different skills needed across the various channels, i.e. some people are better on the phone rather than writing correspondence such as emails. Once sent, an email cannot be totally removed from the various systems it goes through, and could come back to haunt you if quality checks or appropriate training are not in place. The legal implications of public statements particularly on social media sites such as Facebook and Twitter are often not realised until an offending post is picked up by the press.

Agents need to be empowered, but they also need to be given guidelines. Can they escalate to other channels when needed, for example from web or social media to the telephone or to email, and if so, do they know when they can or should do so? Do you provide your agents with guidelines on appropriate responses (social media, email, telephone)?

Agents should be given the authority to make a call back to customers where it is appropriate. This might be to request confidential details that should not be put in a text-based communication such as email or social media, or it might be to reassure the customer or talk them through a specific procedure. However, if the customer raised an issue via social media it would generally boost public perception of a brand of the agent were to then, for example, thank the customer on social media for raising the issue and saying something like “I'm glad we were able to help you resolve your issue”.

Where an agent makes an outbound call as a result of a customer’s query originating on email or social media, the agent has the opportunity to first review the customer’s details, their history and account information. The call means the customer would not have been waiting on hold, does not have to repeat information except answer security questions if appropriate. There is more potential to leave the customer satisfied and reduce negative posts on social media or additional calls to the call centre.
7. Customer Experience Design Guidelines

There is a well-used rule of thumb for designing customer interaction systems that applies equally well to the telephone as it does to modern channels such as the web and email. It can even apply to social media sites.

Essentially, for each communication channel, you should consider the following:

- **Who?** Who is contacting us?
- **Why?** Why are they contacting us?
- **What?** What do we know about them?
- **Where?** Where are they calling?
- **When?** When?

We will take each of these guidelines in turn and look at how they can be applied to the more common contact channels - telephone, email, web (‘contact us’ forms). The guidelines can still be applied to texts and social media posts, albeit in more limited forms.

**The Who**
Who is contacting us?
The more you know about the person trying to contact you, the better you can direct their enquiry and assist them. The caller’s telephone number (caller ID or CLI), if it is not blocked, can be matched to your central database. For emails, the sender’s email address is the best identifier, but you can also encourage customers to include a reference number in the subject line, if appropriate. A web form can be designed to ask for any data that is relevant, such as the customer’s full name, email address, or support or order reference number.

**The Why**
Why are they contacting us?
Even if you are unable to identify them, knowing why they are calling can help you to route their enquiry to the most appropriate team or resource. Telephone systems can pass the dialled number as well as the caller’s number, so if you have advertised a new product with a dedicated phone number, you have a fairly good idea as to why they are calling.

Different email addresses can be useful to separate out email for different departments, rather than having to deal with a deluge in a single corporate inbox, but the challenge here is that if several email addresses are published, say on your website, some people will copy their email to all addresses if they feel they are not getting good enough service. Modern email management systems can also scan the subject and body of the email for key words or phrases, and use those to try and determine why the email was sent.

Web forms often have a subject or reason that is in the form of a drop-down list, and the customer’s enquiry can be passed to the appropriate department based on this selection.

**The What**
What do we know about them?
The ‘What’ and the ‘Where’ are closely linked, since information in your database may be useful to influence the routing of the contact. It can also provide the agent with suggestions for additional products or services (up-sells and cross-sells).
7. Customer Experience Design Guidelines

The Where
Where should we send their interaction?
The main use of this criteria is to correctly route a call, email or web enquiry to the best team, or even to a specific agent. However, based on what you know about the customer so far you may decide to deflect their enquiry. For example, higher value customers could be routed to a dedicated team of agents for more personal service. Lower value customers could be encouraged to use your IVR self-service features, or go to the website. Or you could use data from the customer’s records to totally change the nature of their reason for contacting you – for example, if somebody with a bad debt calls up for a loan, or to buy something new, their call or email could be diverted to the debt recovery team. If their account is settled, the agents could always transfer their enquiry or even help them on the same call or email thread.
The use of standard responses can discourage emails or web contacts that require the intervention of a human, for example an automated email response with links to your website’s FAQ page may head off many general enquiries, leaving your people more able to deal with the more specific customer issues.

The When
When should we deal with their interaction?
Whilst telephone calls tend to be seen as real-time interactions, there are times when it is useful to either offer voicemail options (out of office hours, or during periods of long wait times), and agents can deal with those enquiries during less busy times. Offering call-backs can also be used to defer customers to more convenient times.
Emails are near real-time, and as long as the sender receives confirmation that their email has at least been received, there is the opportunity to use technology to filter, categorise and prioritise emails. As long as you apply service levels and escalation rules, you can still maintain high levels of customer service and satisfaction, yet mould the workload as best you can to your available agents.
Web forms that result in an email can be dealt with as a normal email, whereas offering web chat is setting expectations that you can service the customer in a real-time manner. Of course, you can enable or disable web chat based on your agents’ availability.
8. Summary

Defining and implementing a multi-channel customer system can often feel like being the Speaker in the middle of a heated debate in Parliament, or a diplomat negotiating a Treaty at the United Nations. There will always be internal department issues to address and resolve, each with their own views on issues such as customer ownership, budget, service levels, even the choice of technology. Sales, Operations, Customer Service, Marketing and IT will all be impacted, and hence will all feel they should have a voice in the solution, and indeed they should. But critical to success is a strong executive sponsor who can set the direction and objectives, and empower people to make decisions.

Company-wide processes need to be reviewed and modified if necessary. Usually it is the Customer Service and Marketing departments who need to be the most closely aligned. If a product launch includes a phone number or email address and the Customer Service team is not prepared for the increased traffic, sales and brand loyalty can be adversely affected as well as agent morale and hence performance.

The technical challenges of implementing new systems and integrating them with your existing systems or databases should not be treated lightly. Traditional telephone systems cannot always be adapted to handle emails, and personal email solutions such as Outlook are not appropriate when the agents need to handle telephone calls on the desktop. The reporting across all channels needs to be consistent and should not require significant custom development to get the basic metrics out of the systems.

A truly integrated multi-channel solution should provide you with a single tool to manage agent profiles and skills, set and change routing rules dynamically based on traffic volumes per channel, or view reports across any or all channels by agent, team, product or location. Several vendors now offer solutions built from the ground up to address multiple media formats, offering administrative and reporting tools in a single system.