



Omni-Channel Simplified

A white paper explaining the many capabilities of a complete omni-channel contact center solution from both a business and technical perspective

If you ask 20 people to define omni-channel, you will likely get 20 different answers. But at the heart of those 20 different answers will always be the fusion of two contact center technologies that have been evolving for over 25 years – CRM integration and multi-channel contact handling. CRM integration and multi-channel solutions both provide a broad range of valuable features, but when CRM integration and multi-channel are fused together, the benefits are amplified and organizations see bigger increases in customer satisfaction, agent productivity, revenue, business resilience and profits.

25 years ago, **CRM integration** or CTI (Computer Telephony Integration)

was synonymous with screen pop for an inbound voice call. It makes sense that this is where CRM integration within a contact center began as the ROI for screen pop is one of the best investments an organization can make. Even for small call centers the payback period can be as short as a few months and for larger organizations the payback period can often be measured in weeks or days. That's an investment every CFO is happy to make. Most organizations will find a great ROI (Return On Investment) just from the cost savings generated by call handle times being reduced 15 to 30 seconds on average – and sometimes much more. But when you also include increases to customer satisfaction due to shorter handle times, the ROI increases greatly. Over the last 25 years, CRM integration has evolved from screen pop to include many other valuable capabilities like customer profile database routing, click to dial, customer journey activity logging, outbound campaign management, and intelligent agent scripting.



25 years ago, **multi-channel** meant email and web chat as customer contact channels, but these contact channels were typically handled as standalone channels with no integration of voice contact handling. Over the last 25 years, blended handling and reporting of email and chat with voice contacts evolved and web chat evolved to include other message based interaction channels like SMS/mobile text, Facebook, Twitter, WhatsApp, Line, AppleChat, Skype, and extensions of mobile phone applications with a chat feature for customer service. In addition to more message based interaction channels, a broad range of outbound communications channels has been merged under the umbrella of multi-channel. Outbound phone calls, emails and text messages need to be blended with inbound customer interactions and integrated into customer interaction workflows.

While both CRM integration and multi-channel solutions have evolved over the last 25 years, the fusion between the two has also been significant and the result is what many now refer to as omni-channel. No longer is a CRM screen pop just for inbound voice calls. Agents now need CRM screen pops for emails, web chats, outbound tasks, and callbacks. Agents also need a journey map activity record logged into the CRM for every interaction channel -- inbound voice, outbound voice, email, chat, SMS, Facebook Messenger, WhatsApp, ...

CRM Integration + Multi-Channel = Omni-Channel

The definition of CRM is also expanding as customer data often resides in multiple application databases that agents utilize in the handling of customer interactions. Sales, accounting, manufacturing and customer support departments often use multiple job specific business applications that contain pieces of customer data and these applications generally have user interfaces tailored to the work being done and the data contained within. Often, organizations have also merged with other organizations that use a different set of CRM applications. While it is valuable to the organization, it's not critical that these disparate business applications be consolidated into one application before implementing some omni-channel features. It's just important that there are natural data relationships between the applications and they are all integrated with the omni-channel contact center system. For simplicity, for the remainder of this white paper, we will refer to the collection of multiple applications that house customer data as CRM. This means that a screen pop may be a pop to 2 or 3 different applications and customer journey activity may need to be logged into 2 or 3 different applications. And screen pops and customer journey logging can be extended to non contact center knowledge workers who handle high volumes of interaction with customers – just not via queues.

Self-service and automation are also extensions of both multi-channel and CRM integration and thus have to be considered as part of a complete omni-channel solution. The number one self-service solution is an organizations web site or mobile application. Many organizations have already added click to chat and email functionality into their web site and mobile applications and some have now begun implementing chat and email handling bots that require integration with CRM data. Voice calls, both inbound and outbound, are also now often enabled with self-service options through voice bots that utilize integration with CRM data. These self-service options need to be integrated with other interaction channels and workflows to allow customers to add or transition between channels in a frictionless manner. A web chat may need to transition to an outbound call which may then need to have a video stream added. An outbound SMS notification may result in an inbound voice call enhanced with screen sharing. An inbound voice call may require a follow-up email and that email may result

in an inbound chat session with a chat bot that then needs to transition to a live agent. A Facebook post telling friends about a bad customer experience could be identified and fed into an outbound calling campaign to allow an agent to resolve the problem. A kiosk interaction may require engaging a live agent with video who then maybe sets up a scheduled callback and an SMS confirmation of the scheduled callback date and time. And all of these transitions need to ensure context is passed via screen pops to multiple CRM applications, so that customers do not have to repeat information already provided. Activity logging into CRM applications also has to be completed along the way to ensure an accurate customer journey is presented to the agent and so that activity history can be used to measure quality and identify trends. This ability to move easily between interaction channels and to utilize more than one channel concurrently (like when adding video or screen sharing) is referred to as multi-modal. A new variation of multi-modal is a hybrid version of live and automated customer service where agents have real-time bot assistance integrated into their workspace to help provide them faster and more consistent replies. Another new variation of multi-modal is a Visual IVR interface where callers are visually prompted for inputs on their mobile device while hearing audio instructions through a voice call. Customers can also be prompted on their mobile device for a fingerprint to authenticate themselves during a voice or chat interaction. This wide variety of customer interaction scenarios is why omni-channel is often mis-understood and why it's important to have a comprehensive omni-channel solution to provide support of desired interaction transitions and automations with the necessary CRM integrations.

While agents typically only handle one voice call at a time, it's critical that agents can handle multiple non-voice interactions concurrently. For chat interactions, there is often a long delay while agents wait for a customer reply. For email interactions, there is often a delay while waiting for information from other co-workers. During these delays, it's critical the agent can easily switch to handling a different customer interaction so they keep their productivity and utilization high. When switching between customer interactions, the agent also needs the CRM windows to reflect the customer interaction currently in focus. An intuitive unified agent workspace is the key to effective blended agent handling in an omni-channel contact center.

Another key to increasing agent productivity and customer satisfaction is effective blending of outbound calls and callbacks. Customers on a web site or within a mobile application may desire an immediate callback or a callback at a scheduled time. Inbound voice callers facing high queue times may desire a callback when agents are available. Customers speaking with an agent may find themselves out of time and desiring a callback at a later time. These outbound calls and callbacks need to be blended with other customer contacts. Outbound interactions can also be SMS or email based and it's important that those outbound interactions provide an easy way for the customer to respond and not necessarily using the same interaction channel.

When implementing blended multi-channel contact handling it's important that organizations ensure they have reporting, quality management and workforce management systems designed to support multi-channel. Contact center real-time and historical reporting needs to incorporate all interaction channels and must address the constant task switching that happens when agents are handling multiple interactions concurrently. Quality Management needs to allow supervisors and customers to evaluate not just voice recordings but also email and chat interactions and Workforce Management needs to factor email and chat interactions into forecasts and schedules.

It is important to keep in mind that implementing omni-channel is not a singular finite project, but instead, it is a continuous improvement process. If you try to do everything at once, it often becomes too complex and then no improvements to agent productivity and customer satisfaction get implemented. Sometimes it's best to first pick the low hanging fruit while also working on plans for getting the rest of the fruit in a later phase. So, the question then becomes what is the low hanging fruit (i.e. project). There are many very good omni-channel projects to choose from to increase customer satisfaction, agent productivity, revenues, business resilience, and profits. Projects with low cost and high return / business value have the highest ROI and thus should go first or be near the top of the list (i.e. the low hanging fruit). It's always good to have a list of at least 5-10 projects where you have estimated costs, benefits and ROI so you can be sure you are working on the highest ROI projects first. Every organization will have different challenges and priorities, but the common goal of these projects should be helping customers easily and efficiently interact with your organization. Easily means being able to choose my interaction channel and being able to switch between interaction channels as needed. Efficiently means having logical workflows with CRM data integrated into every step of the customer interaction journey. By smartly combining multi-channel and CRM integration into your contact center, organizations can offer their customers a superior omni-channel customer experience.

About CCT Solutions

CCT is leading the way in multi-experience customer engagement solutions. CCT helps companies communicate with existing contact channels and next generation customer interactions. CCT provides web and mobile based applications for on prem and cloud deployments. This includes the automation of voice, web, email, chat, co-browsing, instant messaging and video, ensuring customer service agents and knowledge workers adapt easily to the changing customer expectations, decreasing contact center costs and providing efficient relationships with their customers.

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