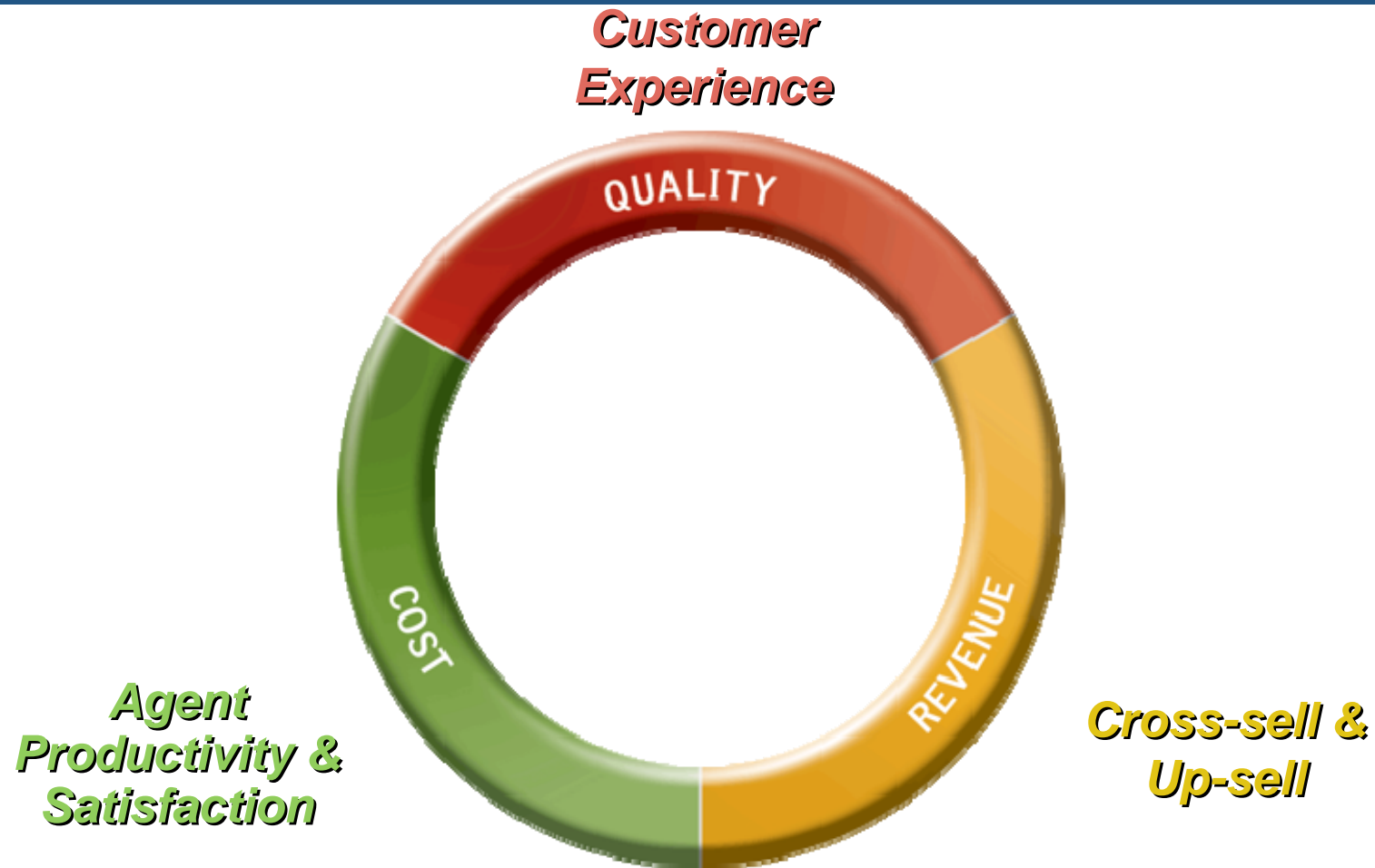


# Building the Dynamic Contact Center

RightNow Summit  
August 2007

# Optimizing Today's Customer Service Goals



# What Customers are telling us..

## BUSINESS DRIVERS

### 1) Operational Efficiency

- Standardize, optimize and centrally manage telephony solutions
- Eliminate duplication of effort
- Reduce AHT -process changes for quicker turnaround time, reduce handoffs (excludes Cards)
- Capture contact history
- Build queuing efficiencies & streamline processes
- Determine right time to call
- Improve availability of appropriate credit counselors based on anticipated call volumes
- Reduce time spent on low risk accounts
- Increase agent productivity by reducing desktop applications
- Improve IVR to enhance service levels and call completion

### 2) Customer Satisfaction

- One number strategy (1 client facing, 1 internal)
- Promote a branded "voice of COMPANY"
- First point of contact resolution primarily via more effective routing and once at the right agent, ensuring appropriate tools are available to the agent

### 3) Revenue Generation

- Focus is on client acquisition and retention - looking at product bundling
- Expand capacity for outbound telemarketing
- More effective matching of revenue opportunities to agents with high sales conversion rates
- Improve inbound and outbound sales performance
- Focus on customer referral rate

### 4) Revenue Protection

- Real-time alerts for potential fraud issues
- Increase hit rate on outbound fraud calls

### 5) Loss Mitigation

- Address the calls in the right manner by having the right call in the right hands at the right time
- Reduce calls to low risk accounts to free up time for higher risk accounts

There is an existing vision that skills-based routing (SBR) will strongly support COMPANY in addressing a number of these items, specifically around



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### Loyalty Driver

*Meet May. She's a customer service avatar—and one of the many ways Royal Bank of Canada's Client First strategy is creating customer advocacy and engagement.*

[Royal Bank of Canada](#) is Canada's largest company by market share from a shareholders' standpoint, with more than 14 million consumer and B2B clients. It's been cited as a "most respected corporation" by a variety of banking industry organizations. And it boasts a top decile ranking of employee engagement. So even at 143 years old, RBC's position doesn't exactly resemble a burning platform for change.

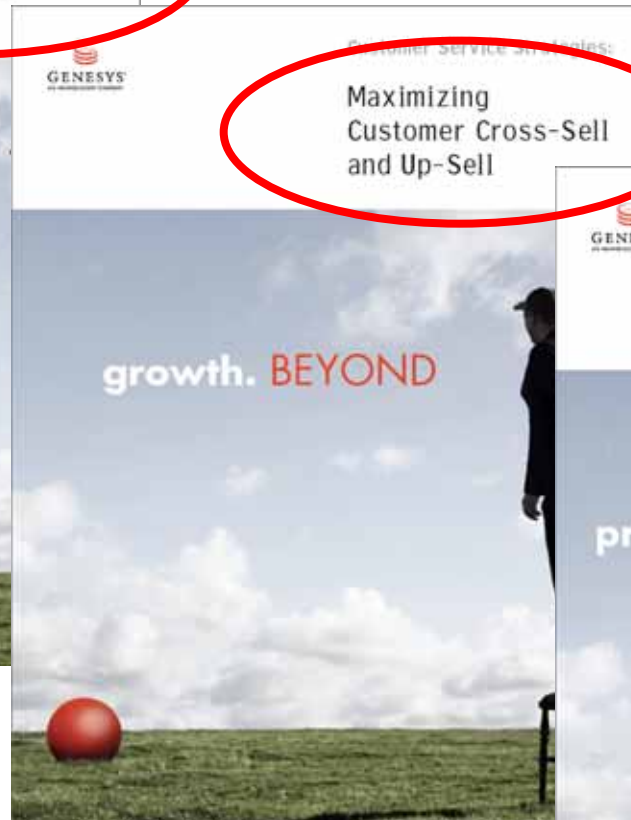
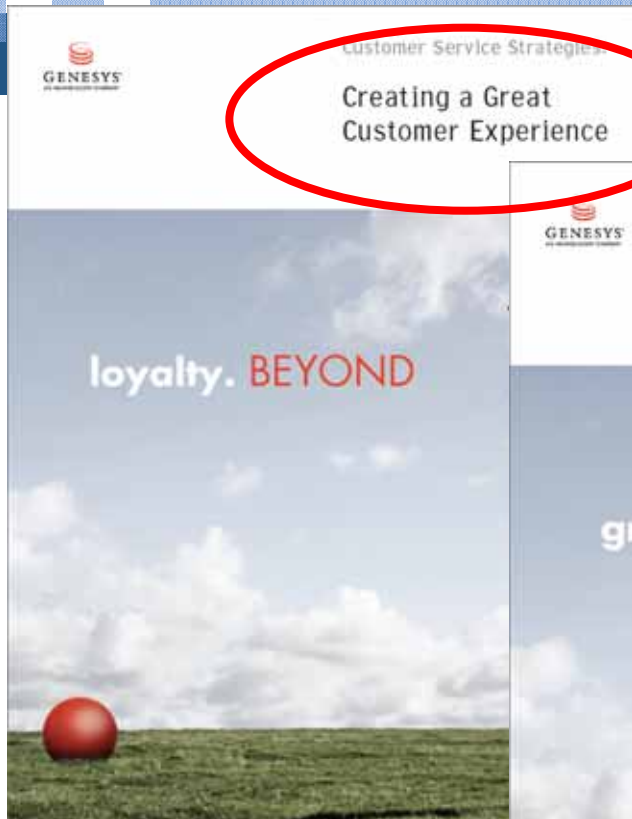
Yet, the Canadian behemoth invested significant dollars and resources to transform



**Industry Convergence**  
Customer Strategy Summit 2007  
September 10-11, 2007  
The Hotel Valencia  
San Jose, CA

**Act As if You Truly Know Your Customers**  
  
be enterprising

# Strategy Guides



# 9 winning strategies for a great Customer Experience

1. Perform after call satisfaction surveys
2. Implement a 'Customer Front Door'
3. Increase 1<sup>st</sup> contact resolution
4. Provide a consistent multi channel experience
5. Maximize resource availability
6. Manage callbacks effectively
7. Communicate proactively
8. Provide personalized services
9. Apply innovative communication



# DYNAMIC CONTACT CENTER™

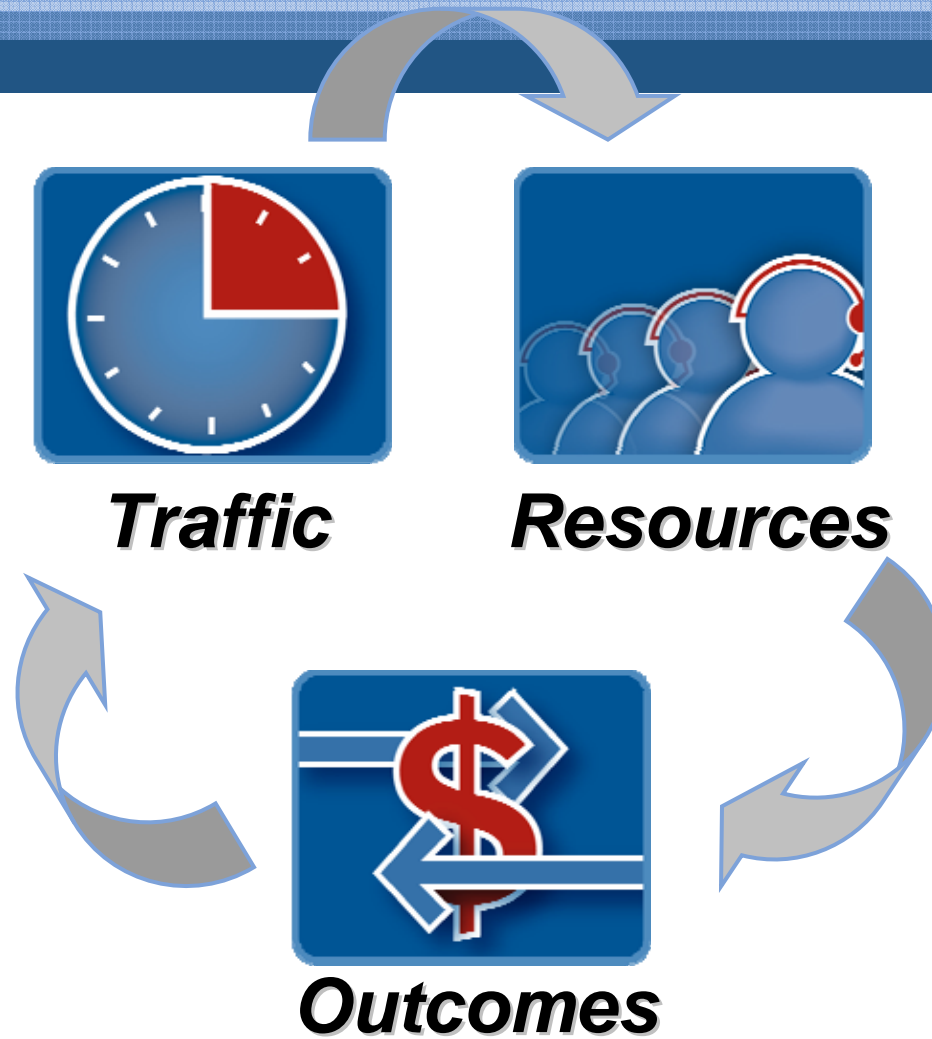
# Dynamic Contact Center defined



*-Expanded model of what contact  
Center capabilities*

*-Linking these capabilities, and based upon  
business rules, shifting priorities in real time  
according to fluctuations conditions*

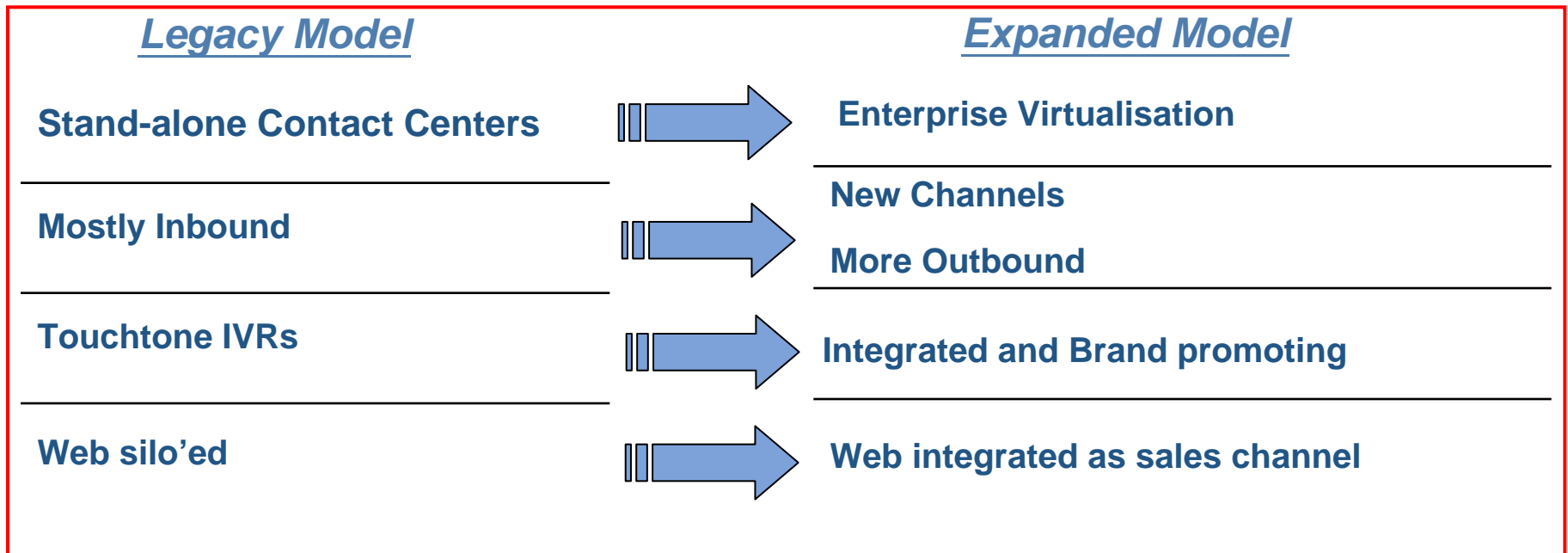
# The Dynamic Contact Center



# Resources



## ***Resources***



**Efficiency and Lost Productivity**

**Empowered, Productive**

# Traffic



## Traffic

### Legacy Model

Majority Inbound - reactive

Outbound typically telemarketing

Some email

Web and SMS underutilized



### Expanded Model

Proactive Relationship Calls

Up sell Calls

Callback

Proactive email, web, and SMS

Web chat, click for callback

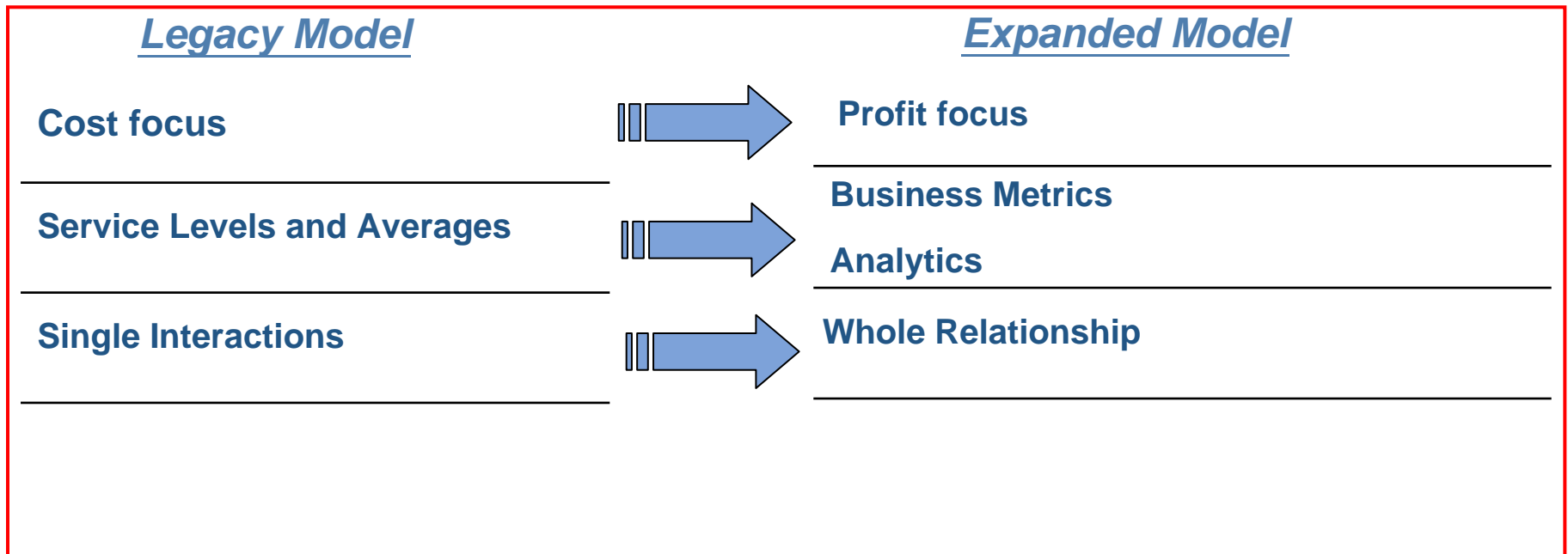
**Reactive to Customers**

**Proactive, Building Relationships**

# Outcomes



## Outcomes



**Customer Service Focus**

**Loyalty and Business Growth**



# Dynamic Capabilities

**Business  
Process  
Routing**

**Workforce  
Mgmt. &  
Optimization**

**Proactive  
Contact**

**Internet  
Integration**

**Customer  
Centric  
Routing**

**Reporting  
& Analytics**

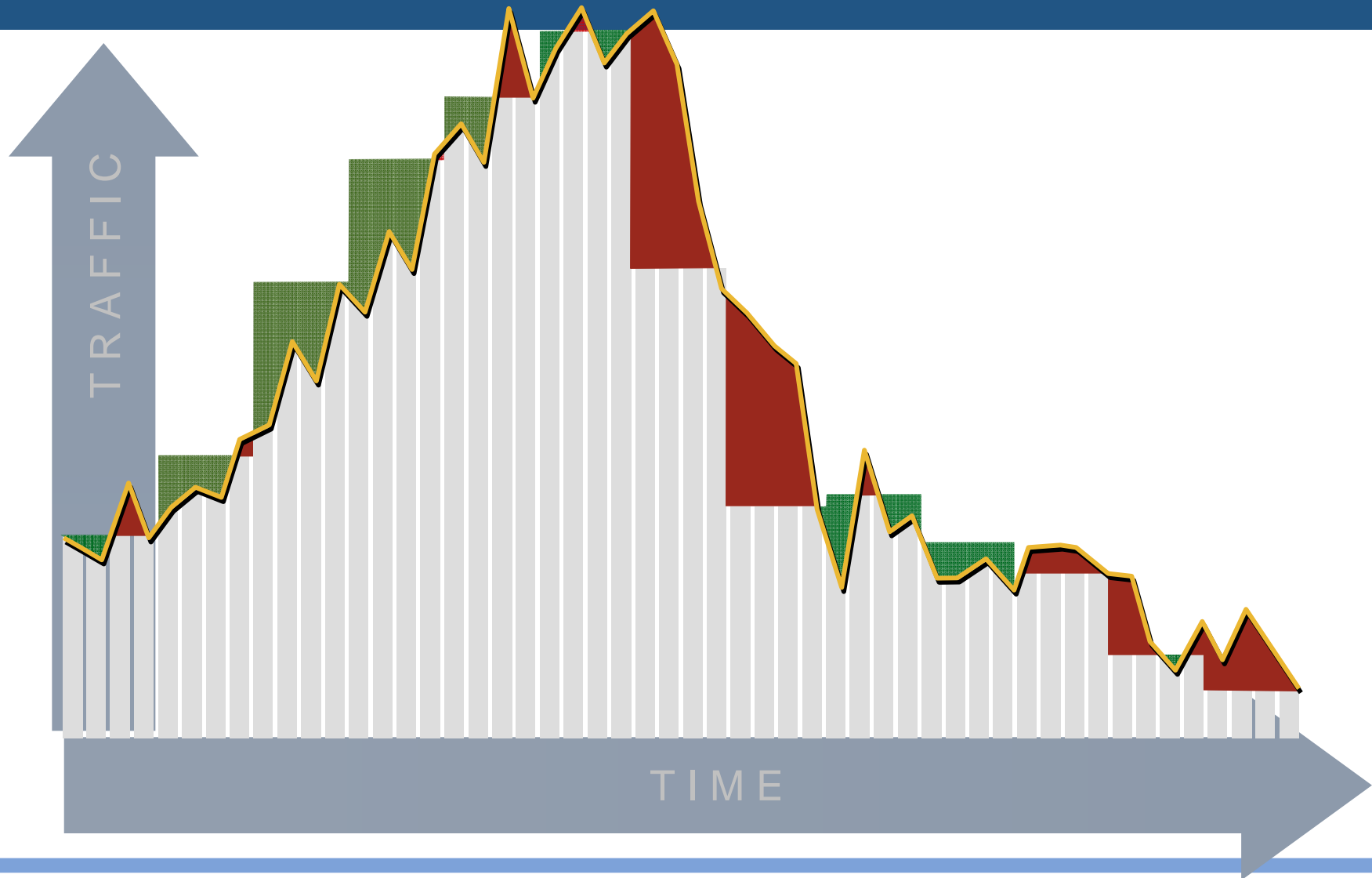
**Branch  
Remote  
Expert  
Integration**

**Virtualisation**

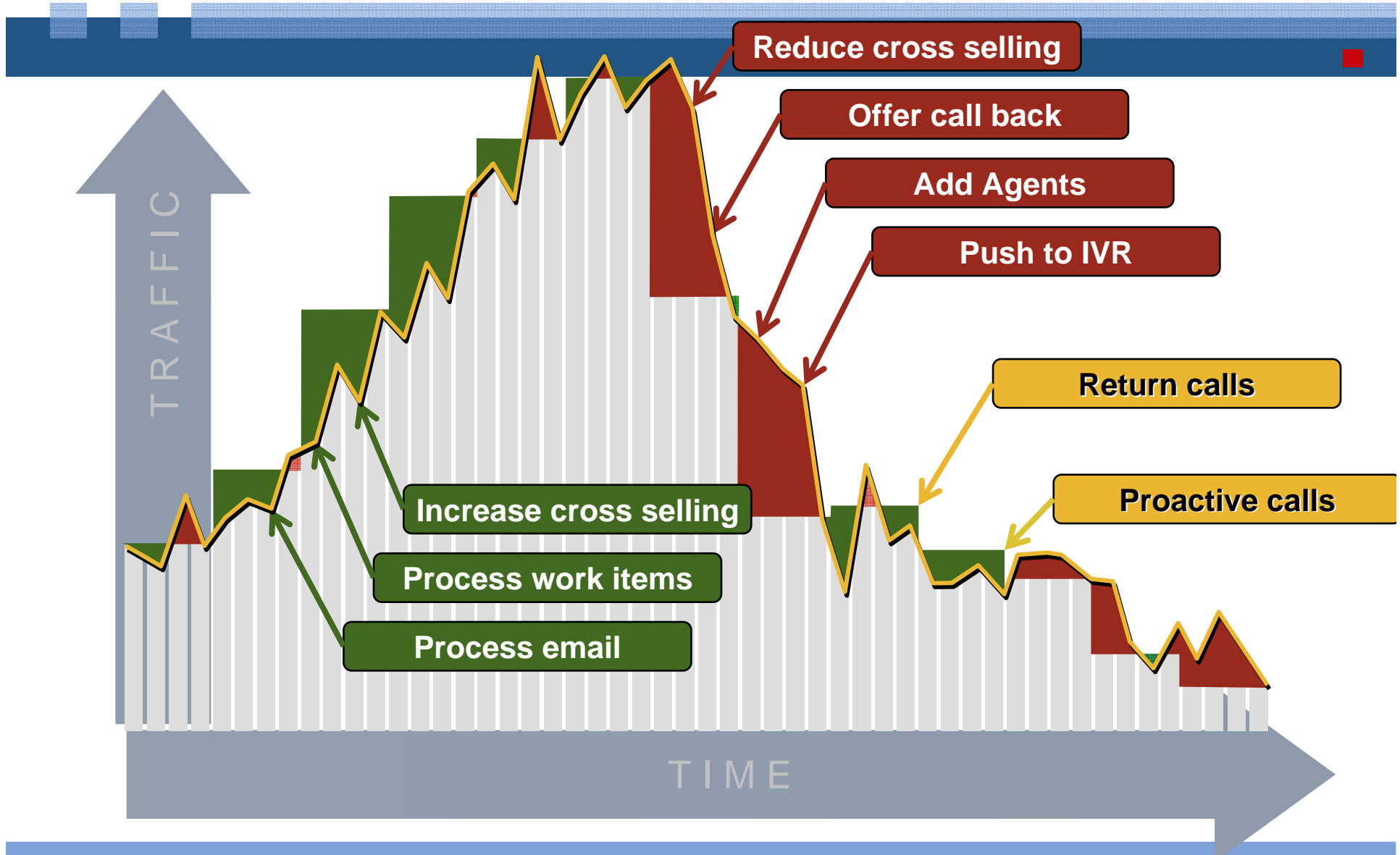
**Integrated  
Self-Service**

**Real-time  
Offers**

# The Daily Business Challenge



# The Dynamic Contact Center



# An Example: Outbound Campaigns

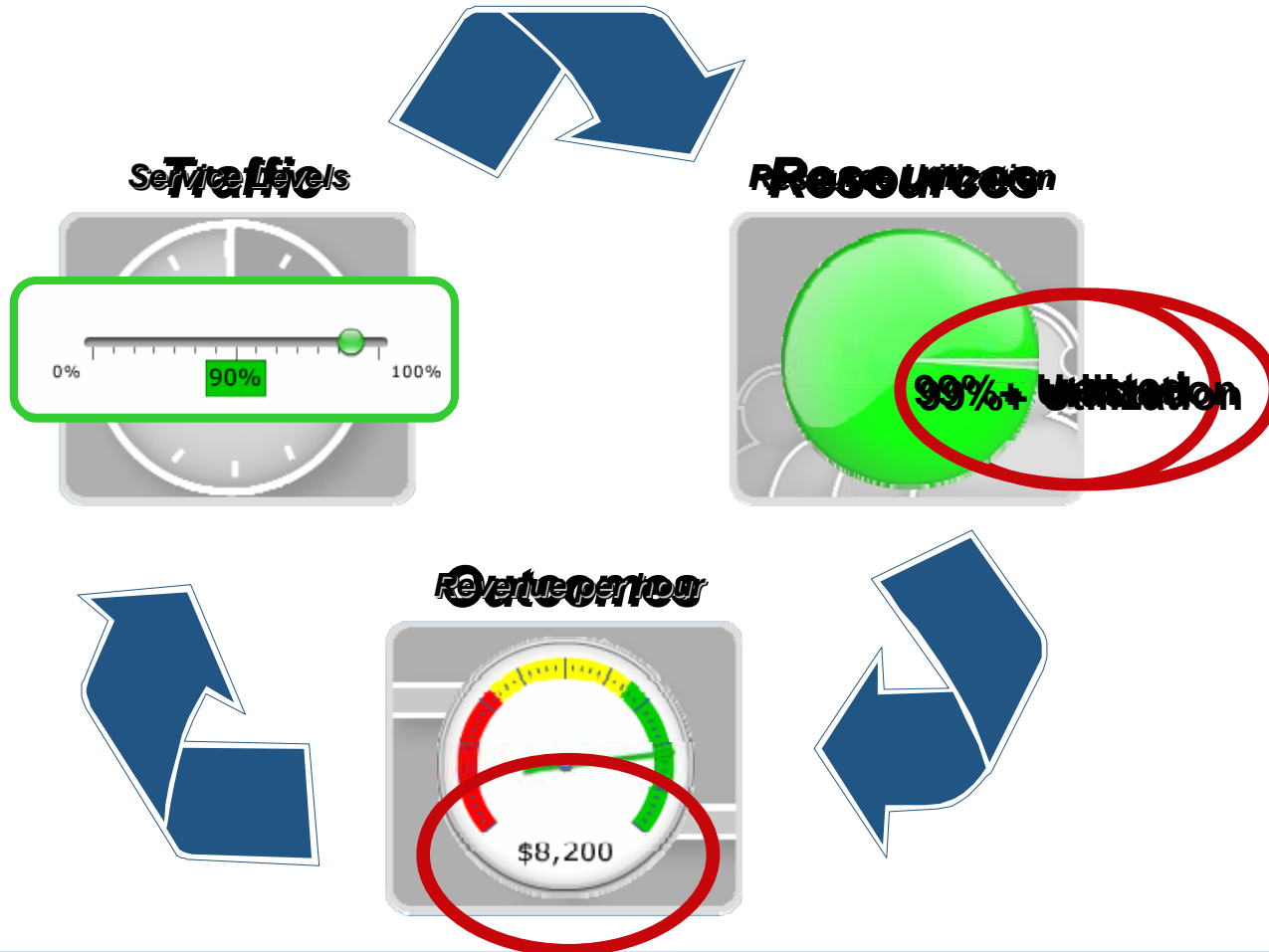
Active campaigns

Managed Funds

Platinum Credit Card

Credit protection

Register for SMS



# Value of Combined Genesys and RightNow Solutions



# Offer Effective Self-Service

- Traditional automation has been focused on cost/process optimization, not the customer's experience
- Empower your customers with self service
- Give your customer a choice
  - Voice
  - Email
  - Web form
  - Chat
- Provide consistent customer experience

*70% of consumers worldwide are frustrated by IVRs with complex menus*

- ✓ **Competent**
- ✓ **Convenient**

# Implement a Consistent Multi-channel Solution



- Give your customer a choice
  - 31% want to use online web chat
  - 78% want to communicate via email
- Improve consistency and efficiency implement a common knowledge foundation across all channels
- Integrate workflow tasks into a universal queue
- Implement universal channel routing and optimization
- Intelligent multi-channel desktop

*Most customers appreciate having multiple channels to contact an organization*

- ✓ **Competent**
- ✓ **Convenient**



# Enterprise Resource Virtualization

- Manage and administer a virtual agent pool to maximize resources
  - Branch
  - Remote
  - Outsourced
  - Agents @ home
- Infuse knowledge on the agent desktop to ensure consistency and efficiency
- Leverage universal routing and queuing maximizing productivity

*US at home agents will grow from 112,000 in 2005 to 300,000 by 2010 (IDC)*

- ✓ **Competent**
- ✓ **Convenient**

# Improve First Contact Resolution: Knowledge at the point of action

- Intelligently route inbound inquiries to the most appropriate agent
- Anticipate customer needs and questions
  - Self-to-assisted service can identify a customer based on number, PIN or email
  - Leverage customer profile and history to reveal relevant information to better understand why customer is calling
- Empower frontline employees and agents
  - Infuse knowledge through agent desktop
  - Automate agent workflow and suggest answers
- Develop comprehensive customer history to optimize resolution rate

*“The inability to reach the right person with the right information drives more than half of customer service dissatisfaction”*

- ✓ **Competent**
- ✓ **Personalized**

# Deliver touch point flexibility: Call Back

- Provide call back services instead of requiring a wait on hold
- Enable customer to request follow up via any channel
- Capture customer inquiry
  - Capture and record contact and inquiry detail
  - Facilitate tracking and management of callback
- Prioritize and schedule call backs
  - Voice
  - Web
  - Sales automation
  - Proactive follow up on abandoned calls

*66% of callers would like the option to ask for a call-back if the wait is longer than they would like*

- ✓ **Competent**
- ✓ **Personalized**

# Provide Personalized Customer Service

- Use customer history from previous interactions to drive relevant communications
- Proactively engage with customers through personalized event triggered communication
  - Segment audience
  - Generate dynamic content
  - Incorporate rules driven actions
  - Monitor analytics and reporting
  - Incorporate multiple channels
- Leverage knowledge of the customer to:
  - Improve first call/contact resolution
  - Improve up sell/cross sell effectiveness
  - Improve notification and survey relevance
  - Identify preferred language and channel of choice
  - Determine service level prioritization

*84% of consumers have indicated they would like to receive proactive communications from their suppliers*

- ✓ **Personalized**
- ✓ **Proactive**

# Conduct Real-Time Satisfaction Surveys

- Listen to the voice of the Customer
  - Collect real-time feedback to improve products, services, and processes
- Capture and act on feedback in real-time during the customer interaction, including:
  - Phone, Email, Web form, Chat
- Build complete customer profiles and determine customer preferences
  - Enable personalized/proactive interactions

***48% of consumers say that customer service has the greatest impact on their loyalty to a company***

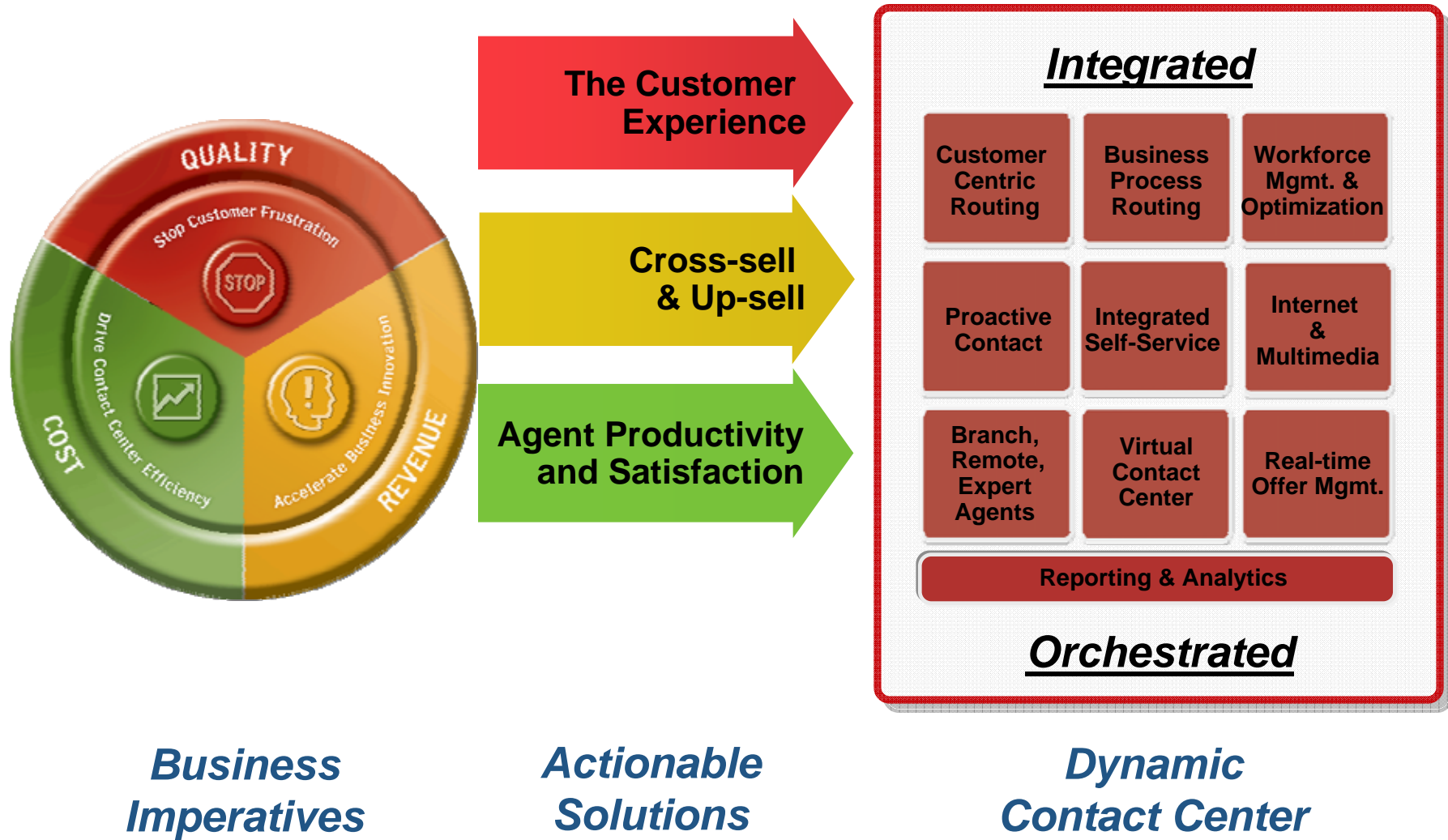
- ✓ **Competent**
- ✓ **Proactive**

# The Ultimate Customer Experience



- Deliver web and voice self-service to your customers
- Intelligent desktop integrates all customer interaction channels
- Underlying knowledge foundation feeds content to the web and agents
- Ensure customers receive the best service available by intelligently routing inquiries to the appropriate agent
- Consolidate and virtualize resources to optimize operations

# Pulling It All Together



# To Learn More



**GENESYS**  
AN ALCATEL-LUCENT COMPANY

- DCC White Paper
- DCC Flash Demo
- DCC Thought Leadership Article
- Coming Soon: “Dynamic Contact Center for Dummies”

## The Role of the Dynamic Contact Center Within the Executive Suite

www.CRMproject.com/15764

C-level executives are turning their focus to a contact center that optimizes cost, quality and revenue generation goals by leveraging people, processes and technology.

**Randy Branch**  
Genesys Telecommunications Laboratories

**Randy Branch** is the director of product marketing at Genesys, responsible for driving adoption of Genesys' multi-channel call center applications. Prior to Genesys, he was a founding member and director of product marketing at Active Factoring, and held marketing and product strategy positions at Cable and Wireless, Autodesk, Oracle, Informatica, Mr. Popper IT and Bank.

In the past, the contact center was viewed by C-level executives as a “necessary evil” focused on cost containment. These contact centers were limited to a single location, targeting basic frontline support, with minimal financial justification to the overall organization.

Today C-level executives recognize the contact center’s unique role as the gateway to existing and prospective customers as a means to achieve customer satisfaction and revenue goals.

- **Chief Marketing Officer** – How can the contact center align with demand generation, PR, corporate advertising and customer loyalty campaigns?
- **Chief Financial Officer** – How can the contact center maximize its revenue generation potential while controlling costs?
- **Chief Operating Officer** – How can the contact center be leveraged to gain operational efficiencies in other areas of the business? How can the contact center minimize customer churn?
- **Chief Information Officer** – How can technology help the contact center achieve cost savings, customer service and revenue goals?

This renewed focus on the C-level challenges the contact center to abandon its singular focus on cost containment and also address customer satisfaction and revenue generation goals. At the same time, customers expect more from companies with which they do business and anticipate fast and consistent service across a variety of channels of their choosing.

As organizations make the transformation to a revenue- or profit-based contact center, they are faced with identifying areas for change, including service costs, providing differentiated service, increasing sales, supporting a multichannel customer experience and leveraging technology. These challenges, coupled with increasing customer expectations, have caused contact centers to pause and question the traditional model of contact center management.

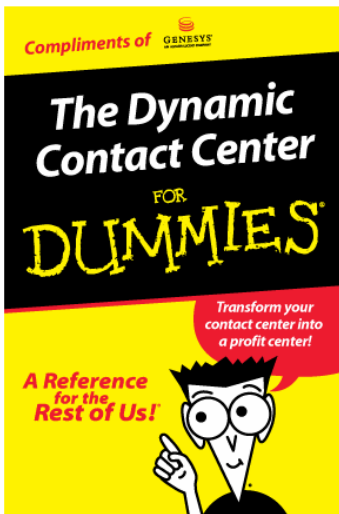
As a result, contact centers now have a prime opportunity to embrace a breakthrough model and vision – the dynamic contact center. This vision redefines how contact centers manage their functioning environment to simultaneously achieve cost, quality and revenue goals.

The dynamic contact center is based upon 10 key capabilities offered by Genesys. In this paper, we’ll discuss six of the key capabilities and related trends that are driving contact centers to make the transition into a profit center.

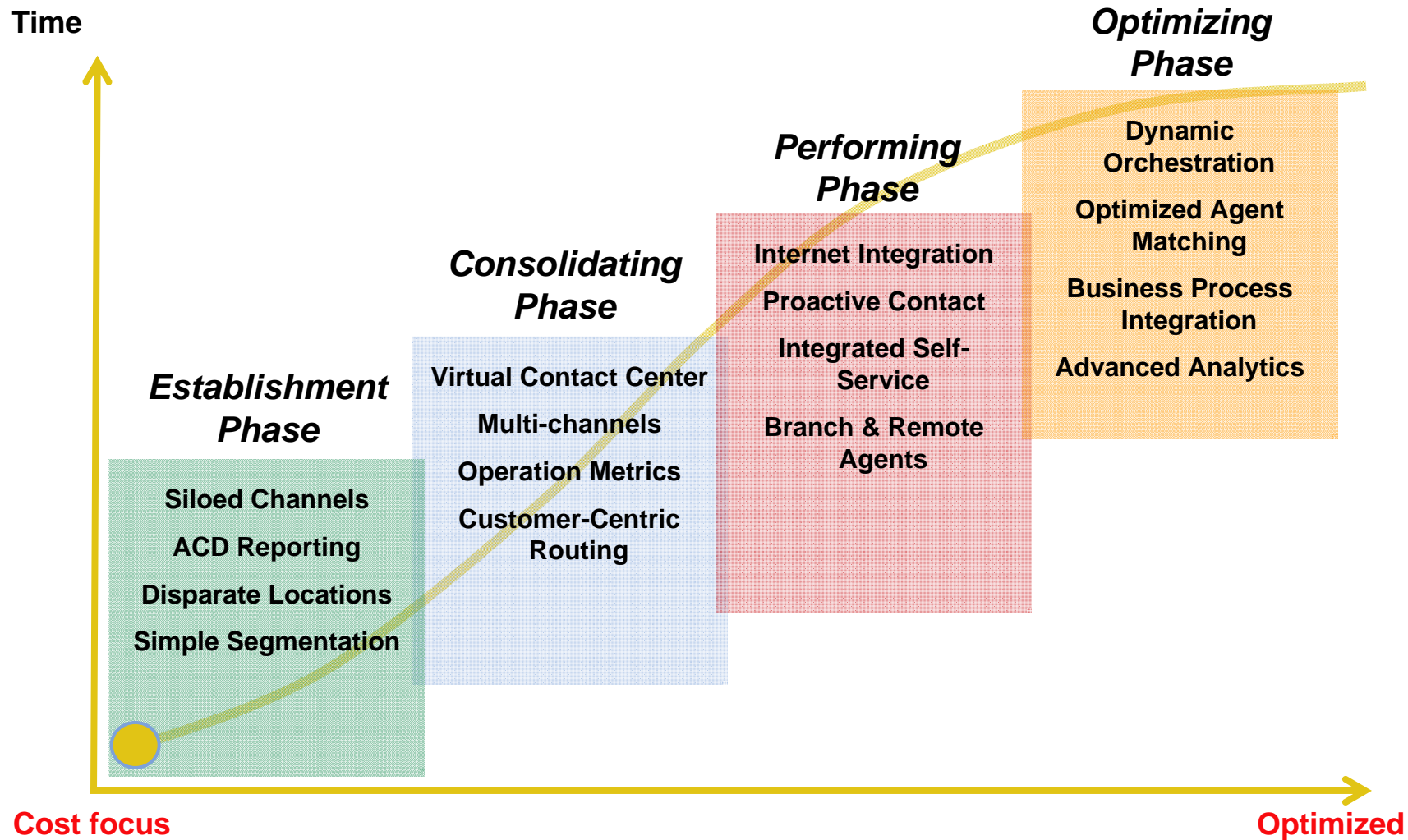
**Branch and Ramota Agree Integration**  
The remote agent concept is rapidly taking hold within contact centers around the world. The main driver of this trend is the demand placed on contact centers to reduce costs without adversely affecting service. Other factors include the negative backlash and press from offshoring and the need to augment staffing requirements for peak, part-time hours, early mornings and late nights. Since remote agents can physically be located anywhere, the best possible resource can be incorporated within the pool of contact center resources. Finally, contact centers can now combat high attrition rates while providing an alternative to agents coping with skyrocketing gas and cost-of-living expenses.

The emergence of such progressive tools that direct remote agents, proliferation of broadband and IP-based standards will also help drive adoption of home or remote agents. IDC forecasts that the number of U.S. remote agents will increase from an estimated 112,000 in 2007 to more than 300,000 by 2010. This estimate aligns with the growing trend of teleworkers in the United States. Today the number of Americans whose employer allows them to work remotely at least one day per month increased 65 percent, from 7.6 million in 2004 to 12.4 million in 2006, according to a recent report issued by World at Work.

The pervasiveness of broadband and IP technologies are also enabling a growing remote workforce in Western Europe. By 2010, the Center Group predicts there will be more than 5.2 million employees working remotely in Western Europe,



# The Contact Center Maturity Model





GENESYS  
A TEL-LUCENT COMPANY

# 5 Steps to a Dynamic Contact Center

- 1) Align contact Center to strategic objectives
- 2) Expand your view – Resources, Traffic, Outcomes
- 3) Create a roadmap and plan
- 4) Implement key capabilities – build success!
- 5) Integrate and automate in real-time



# Use the Dynamic Contact Center to Go Beyond

## *Customer Experience*



**Thank You**

**stever@genesyslab.com**

