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A dark blue silhouette of a mountain peak.  
**S U M M I T 0 9**

**INTELLIGENT INTERACTIONS -  
THE NEXT EVOLUTION IN CUSTOMER  
CARE: A CASE STUDY**

**Jo Ann Parris, Vice President  
Relationship Technology Management  
Convergys**

**CONVERGYS**  
*Outthinking Outdoing*



# Convergys Corporation

A Global Leader in Relationship Management

## Key Facts About Convergys

- Dedicated relationship technology division
- Enables more than 1 billion customer transactions per year
- Billing for 350+ million communications subscribers worldwide

## A Leading Public Company

- \$2.8 billion in revenues
- Listed on NYSE, S&P 500, Fortune 1000
- A *Fortune* Most Admired Company for nine consecutive years
- Serve more than half of the Fortune 50 as clients

## Worldwide Capabilities

- 70,000 employees
- 83 customer and employee contact, service and data centers worldwide; focused on optimizing employee and customer experience
- Clients in 70+ countries speaking nearly 35 languages

# Driving Value to Our Clients & Their Customers

Delivering the voices and technologies that drive superior customer experiences



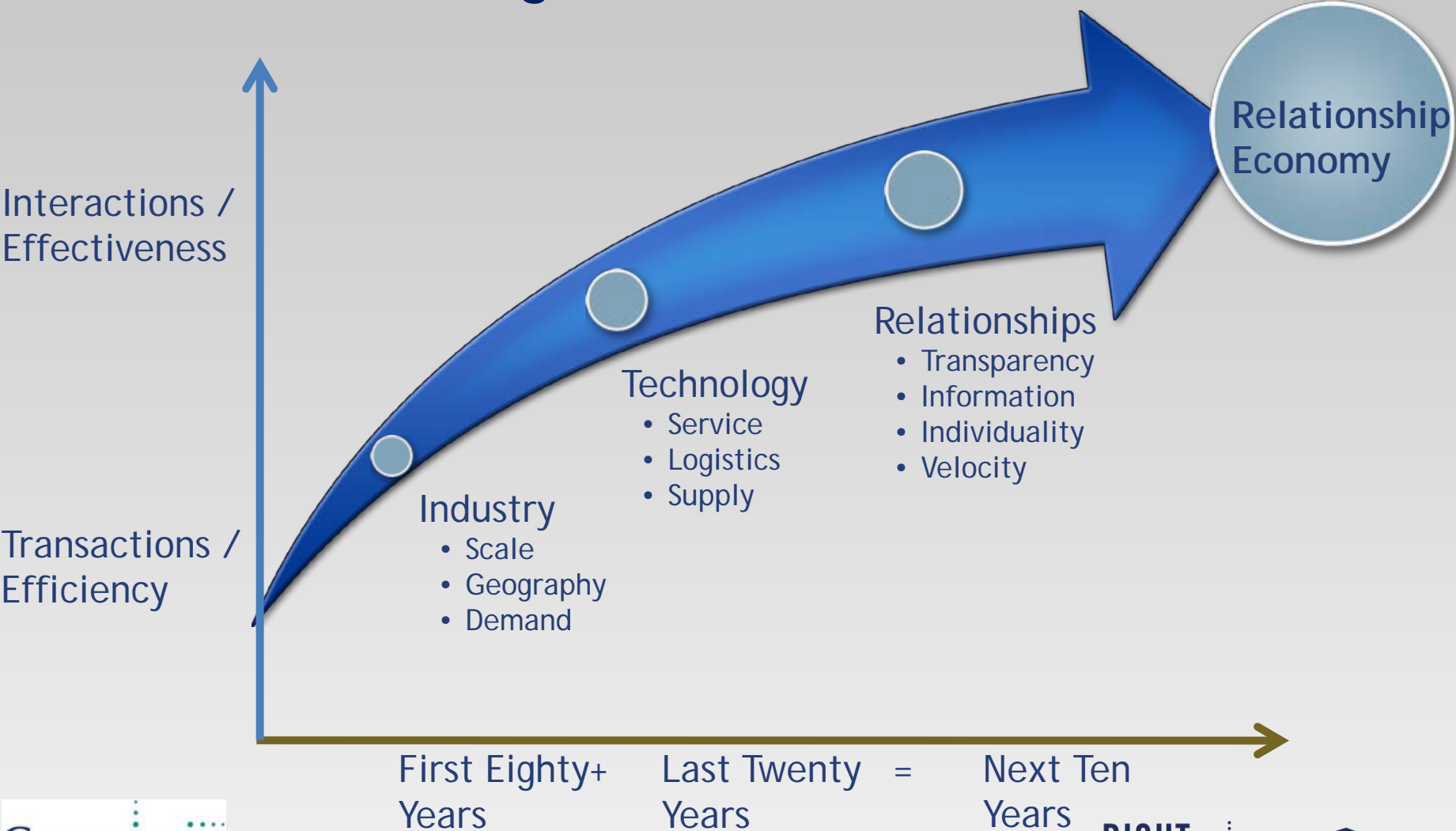
Throughout Customer Lifecycle

Increase Revenue

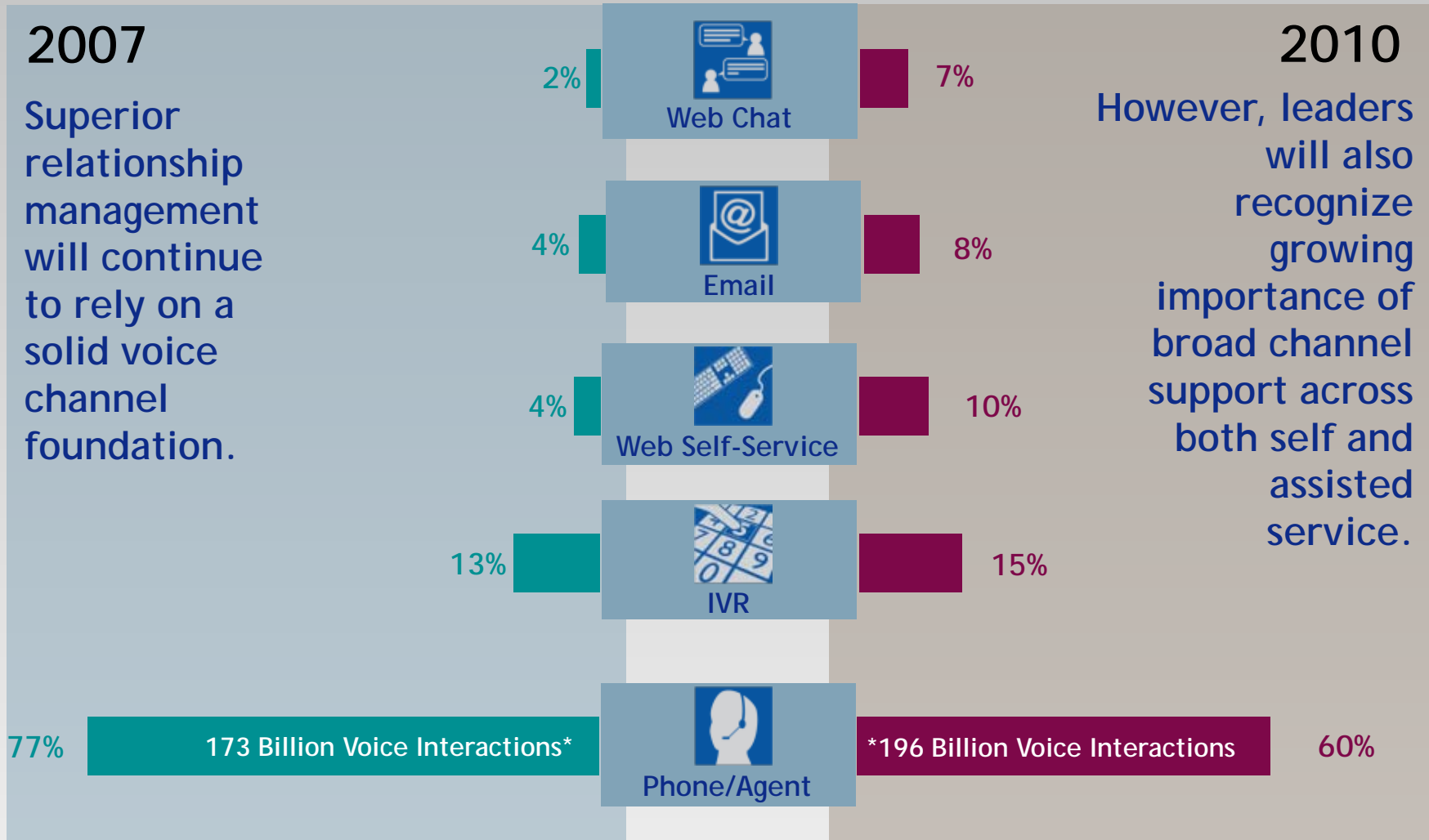
Retain Customers

Reduce Cost

# Economic Environment: Forces of Change



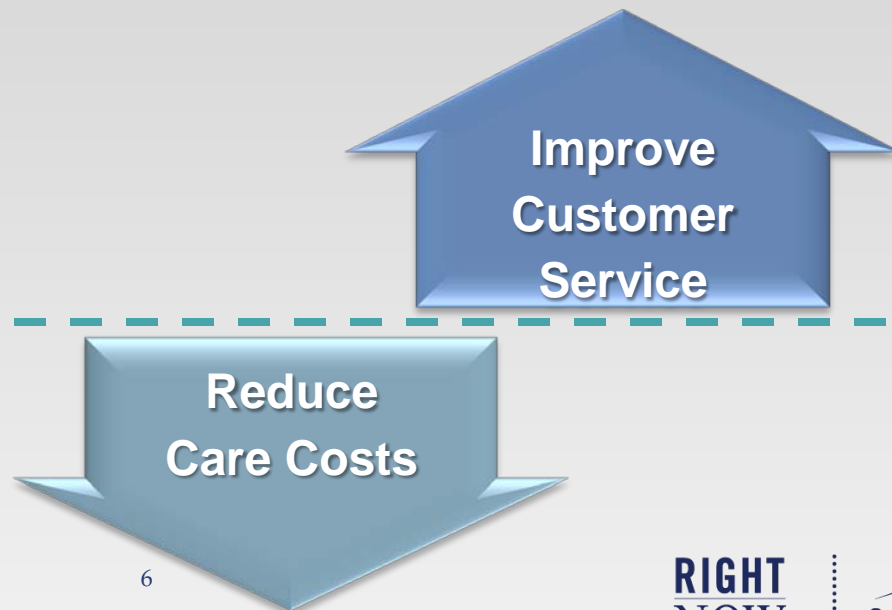
# Market Data: Channel Preferences are Changing



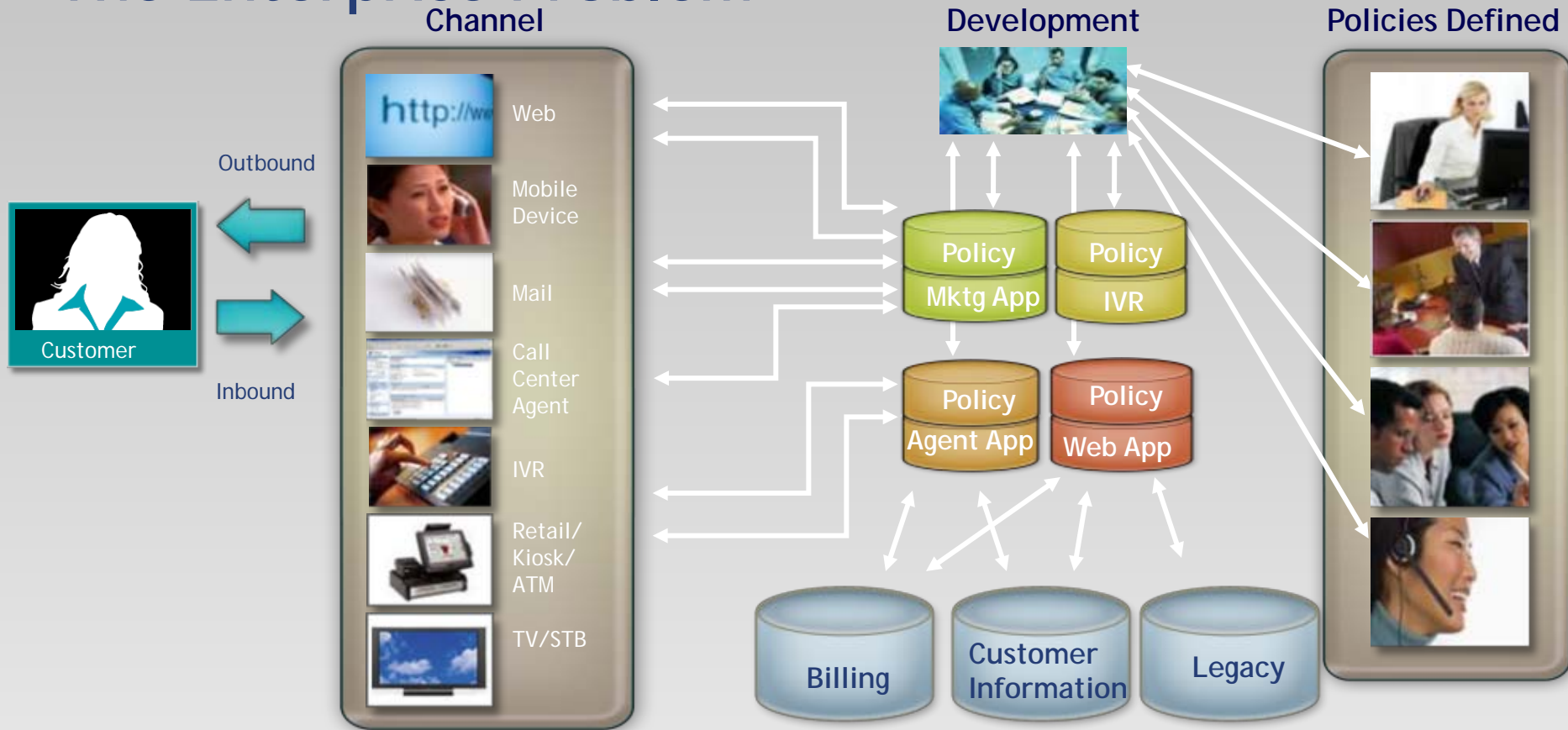
# Where Best to Invest in Service ?



- ▶ Are all customers equal?
- ▶ Should everyone get the same level of service?
- ▶ Which customers are costing you money?
- ▶ Who will churn?
- ▶ Are all channels equal?



# Intelligent Interactions: The Enterprise Problem



- Disjointed policy management across the enterprise
- No consistent implementation of policies
- Internal structure is dictating the customer experience

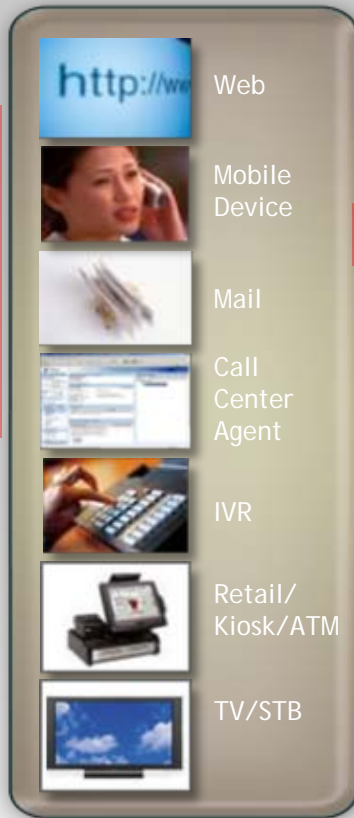
# Intelligent Interactions: The Enterprise Solution

RightNow CX,  
the customer  
experience suite

Outbound

Inbound

Channel



Dynamic Decisioning Solution

Policy Manager

Sensors

Real-Time Decisioning

Actuators

Policy Engine  
Recommendation Engine  
In-Memory DB

Customer Data Integration/Access

Policies Defined



One-time  
Integration



- Intelligence driving every interaction; through every channel
- Business analysts easily develop and deploy business policies
- Quick time to market
- Superior, consistent customer experience

# The Intelligence Engine - A Closer Look

## Inbound Events

Can be things such as:

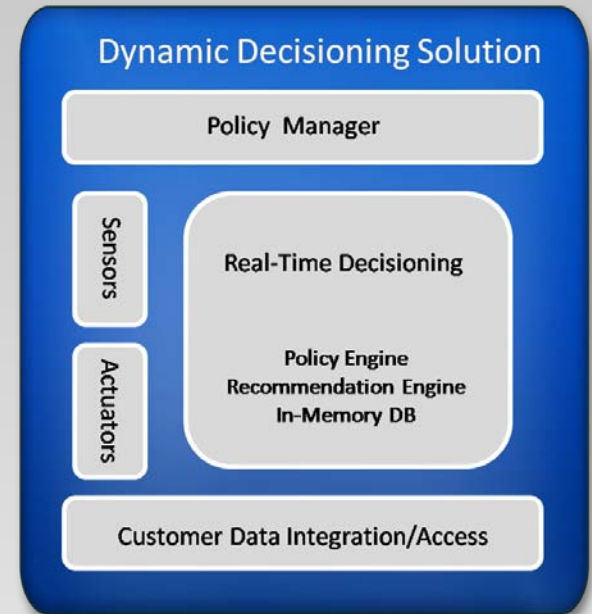
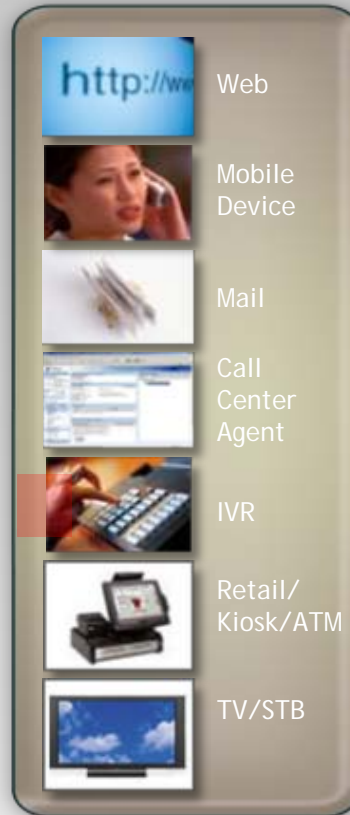
- call to customer service
- use of a service
- account posting error
- customer at kiosk
- batch feed
- button push by agent ...

## Outbound Actions

Can be things such as:

- send an e-mail or SMS
- provide a message in the IVR or STB
- recommend an offer
- screen pop to agent
- priority call routing
- confirm eligibility for support
- personalized Ad
- do nothing ...

## Channel



Access to relevant data  
from many different  
sources

# Aligning Company & Customer Views for Proven Results

## ► Actionable Analytics Intelligence

- Leveraging “Outside in” Approach to understand Customer Behavior



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# INTELLIGENT INTERACTIONS CASE STUDY:

## Fortune 50 Financial Services Company



# Case Study: Fortune 50 Financial Services Company



## Client Business Need

- ▶ Improve knowledge of the customers' behavior, e.g. when they are calling and what they are doing in the IVR
  - Provide more proactive and personalized service to improve the customer experience and increase call containment rate in the IVR
  - Find technology to minimize impact from volume spikes on the 1st and 15th each month due to Social Security benefit inquiries



## Case Study:

# Fortune 50 Financial Services Company

## Intelligent Interaction Solution

Delivering a *personalized and relevant* customer interaction by leveraging embedded business policies to increase loyalty and drive cost reduction.



**Personalized automation**  
to enhance the customer interaction



**Decrease operational costs.**



**Cross-Sell/Upsell**  
Leverage customer data for real time offers

### Solution Elements:

- Added intelligence to voice portal solution through integration with intelligence engine
- Configured policies to simplify social security customers' steps to get quickly needed information
- Provided proactive messaging in IVR based upon customer behaviors
- Increased customer satisfaction without agent intervention
- Developed tracking mechanism for repeat callers to enhance profile database

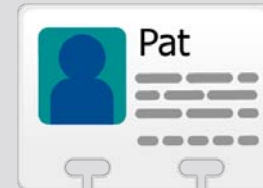
# Intelligent Interaction Solution in Action

IVR: "Your Balance includes a Social Security deposit of \$703.00 made on April 11."



Convergys  
Intelligent  
Self-Service

"Say or enter your account number."



- Over age 62? ✓
- Calling between 1<sup>st</sup>-7<sup>th</sup> of month? ✓
- Deposit in past 5 days? ✓



## Case Study:

# Fortune 50 Financial Services Company



## Client RESULTS

- ▶ Designed and deployed under 4 months, preserving current IT infrastructure
- ▶ Rapid integration with bank's customer data systems
  - Increased containment rate to 93% - an increase in almost 4 percentage points above historical rates
  - Savings for \$3 per agent handled call per each call contained
  - Now also leveraging policies for upsell with IRA and CD renewals



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# INTELLIGENT INTERACTIONS CASE STUDY:

## Fortune 50 Wireless Company



# Case Study: Leading Fortune 50 Wireless Company



## Client Business Need

- ▶ Apply appropriate service treatment on handset swaps and upgrades based on “lifetime value” of customers
  - Maintain satisfaction of “high value” customers; ensure consistent treatment across all customer service touch points
  - Reduce overall costs



# Case Study: Leading Fortune 50 Wireless Company

## Intelligent Interaction Solution

Delivered enterprise-wide policy management to ensure adherence to mobile phone hardware upgrades across web, retail, IVR and contact center channels.



Real-time automation  
regardless of channel



Decrease  
Hardware  
subsidies to low-  
value customers



Cross-Sell/Upsell  
Leverage customer data  
for real time offers

### Solution Elements

- Consulted client on the creation and centralization of a value-based customer methodology; developed policies for 60+ million customers to ensure “lifetime value” program
- Implemented Convergys Dynamic Decisioning Solution to manage policies across all service channels including 800#, retail stores, partner stores and online
- Automated customer treatment recommendations to service representatives and store personnel consistent with these new policies

# Intelligent Interaction Solution In Action

Mobile: (423) ... W2, TENEARA, In Service: 08/13/1999

General | Descriptions | Actions | MOU

Place of Prim... Upgrade for Mobile: (423) 902-5156

Last Name: F  
First Name: T  
Title:  
445 MORNIN  
RINGGOLD,  
GA 30736

Agent  
Agent Code: 0  
Retail Code:  
Sales Rep:

Deposits  
Received:  
Returned:

Routing ID  
REG - REGU

Location  
Market: 10 - Chattanooga Site: Confidential

Eligibility Status: 03 - Eligible. Standard 2-Yr pricing. Waive Upgrade Fee.

Additional Eligibility Results  
07 - If your future MRC > 69 and < 99, you can qualify for \$50 Off Std 2-Yr pricing. If your future MRC > 99, you can qualify for \$100 Off Std 2-Yr pricing.

Commissions  
Agent: [ ] Sales Rep: [ ]  
Retail: [ ] User ID: DP1552

User Note:  
[ ]

Cancel  
Check  
Upgrade  
Override

CPNI Status: [ ] Last Updated: [ ] Billing Indicator: ADVANCE

**Eligibility status and cross sell up-sell demonstrated**

**Additional eligibility results**

# Case Study: Fortune 50 Wireless Company

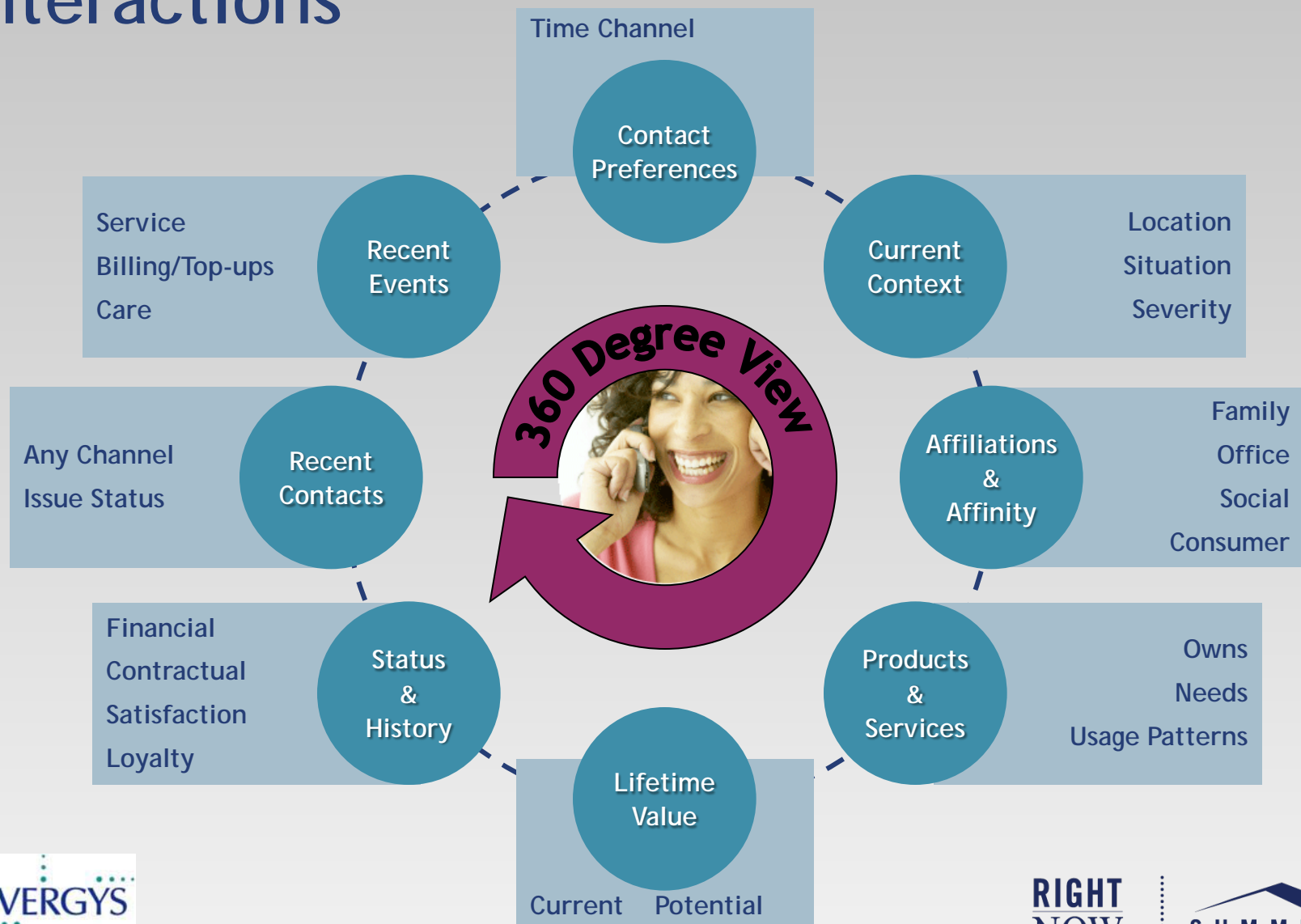
## Client RESULTS



- ▶ Recouped initial investment in just 8 weeks from trials that involved <10% of all client markets
- ▶ Contributed to overall reduction in net churn
  - Client estimates projected cost savings of >\$100 million per year equating to a 20% annual cost reduction
  - Shorter handle time to process requests and consistent experience increased customer loyalty and satisfaction
  - Now using for offer management, wireless & wire line combined billing, and credit and activation fraud detection



# The Right Balance via Intelligent Interactions



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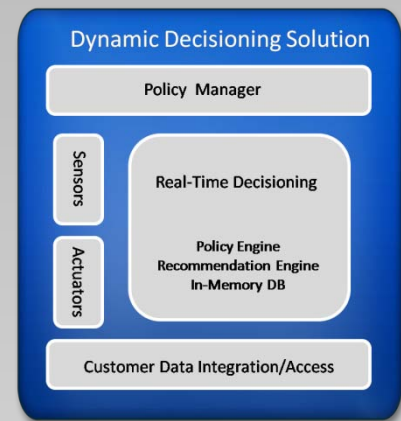
**THANK YOU**

Email: [jo.ann.parris@convergys.com](mailto:jo.ann.parris@convergys.com)

Twitter: [@convergys](https://twitter.com/convergys)



# Retail Scenario: Up-Sell and Cross-Sell



## Sensor

▶ Jim calls Retailer's credit card line to ask about interest rates on his financed HDTV.



## RTD Engine

▶ Customer data integration verifies Jim's account in the Siebel CRM system using his Retailer's credit card number and last four digits of Social.



▶ Policy and Rules Engine determines a Jim has set-up auto-pay and has not missed a payment in last 14 months.

▶ Policy and Rules Engine determines Jim is a Rewards Zone member making him eligible for Apple iPhone \$50 coupon.



## Actuator

IVR message played: "Thank you for continuing to hold. Did you know that as a valued Rewards Zone member, you have an exclusive offer to receive \$50 off a new Apple iPhone?" Jim presses 1 to hear the offer. A coupon is emailed to him.

# Technology Scenario: Up-Sell and Cross-Sell



## Sensor

- ▶ Lisa, a network administrator, calls Company's Help Desk due to malfunctioning network routers. Lisa is prompted for customer support ID in IVR.



## RTD Engine

- ▶ Customer data integration verifies in SAP that Lisa's support for Netgear products has expired. She is not entitled to live support.

- ▶ In real-time, her call is re-routed from Help Desk to Support Sales Desk to renew support contract.



- ▶ A live agent asks if Lisa would like to renew her support contract for 12 months on her suite of Netgear products.

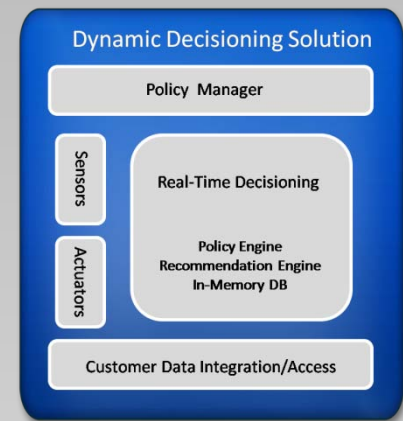


## Actuator

- ▶ A confirmation email is sent to Lisa confirming her renewal with an attachment of her support contract.

- ▶ After completing live agent call, Lisa is placed in priority queue for live support.

# Telco Scenario: Cost Reduction



## Sensor

- ▶ Susan calls Telco's customer service line about her subscription plan.
- ▶ Enters mobile number in IVR.



## RTD Engine

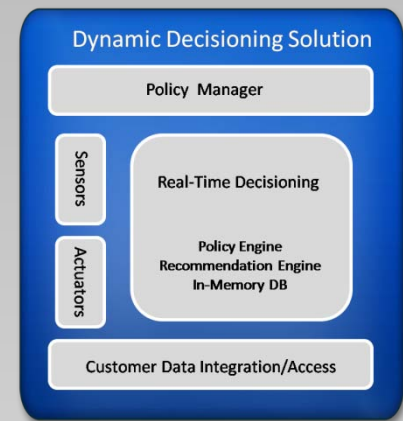
- ▶ Customer data integration verifies Susan's prepaid mobile account in the BSS/OSS system
- ▶ Policy and Rules Engine determines Susan has not received a Top Up offer in the past 7 days.
- ▶ Policy and Rules Engine determines Susan is a high-value customer and eligible for a free \$3 top up with \$20 voucher.
- ▶ Verifies top ups and updates the customer balance



## Actuator

- ▶ IVR message played: "Would you like to take advantage of our Top Up offer? Susan answers "yes" to hear offer. Susan presents a valid \$20 voucher. IVR states "Thank you for your \$20 top up. Your total top up amount is now \$23. Enjoy!" Confirmation SMS message is sent.

# Healthcare Scenario: Customer Loyalty



## Sensor

- ▶ Julie calls United Medical support to ask about dependent coverage.
- ▶ Enters Social in IVR.



## RTD Engine

- ▶ Customer data integration determines customer has past claims for diabetic prescription medication.



- ▶ Policy and Rules Engine determines to offer discounted home diabetes test kit with free month supply of strips.



## Actuator

- ▶ IVR message played: "Thank you for continuing to hold. As a diabetic patient, you're qualified to receive a Accu-Check home diabetes test kit and free month supply of test strips. Press 1 to have a kit mailed to your home address."