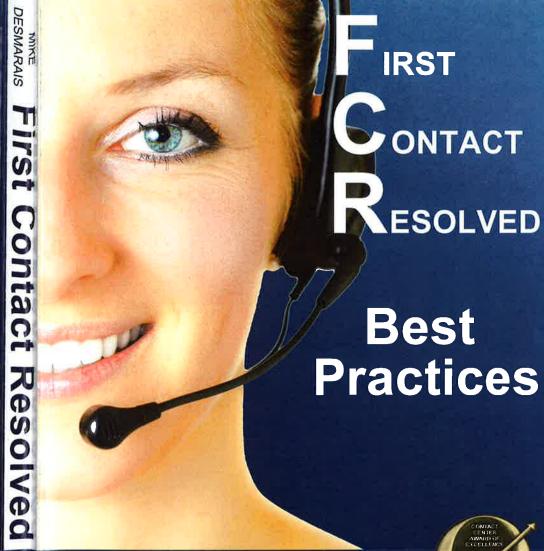## First Contact Resolved Best Practices

This book covers the Top 10 First Contact Resolution and Multi-Channel Customer Experience Best Practices from Award Winning Contact Centers and SQM:

- Quality Assurance – 407 ETR
- Desktop Applications – Comcast Corporation
- CSR Recognition – Regence BlueCross BlueShield
- Career Development – Sun Life Financial
- Call Handling – Canadian Tire Financial Services
- Escalation CSR Support – VSP Vision Care
- Performance Management System – Scotia iTRADE
- CSR Coaching – MedSolutions
- CSR Training – Premera Blue Cross
- CSR Selection – Canadian Tire Financial Services
- Multi-Channel Customer Experience Research – SQM

Mike Desmarais, President and Founder of SQM Group Inc., is considered North America's leading authority on measuring, benchmarking and improving contact center first contact resolution performance. SQM Group has over 70% of their tracking clients improve their contact center first contact resolution performance year over year and they are very proud of this accomplishment.

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FIRST

CONTACT

RESOLVED

Best Practices

Top 10 FCR & Multi-Channel Customer Experience Best Practices from Award Winning Contact Centers

MIKE DESMARAIS

CONTACT CENTER AWARD OF EXCELLENCE

SQM

Desktop Applications – Questions to Use for Assessing Your Practices

- What is the primary purpose of your desktop applications?
- Is the CSR desktop unified?
- Does your CRM have a checklist available for CSRs to use to assist them in resolving calls?
- Do your CSRs view the KMT and CRM as being valuable for resolving calls?
- Is your KMT used for both customers and CSRs?
- Do you get customer and employee feedback about how you can improve your desktop applications for resolving calls?
- Do you use a test pilot approach for examining the changes on your desktop rollout versus a major rollout?
- Do you have VP sponsorship for desktop applications implementation (new and ongoing)?
- Do you have a desktop applications owner who oversees all CSR user experience, technology and policy practices?
- Do you have KMT authors, reviewers and editors for new and edited content?
- Can your KMT be, or is it, used for customers to self-service?
- Do you use desktop application guidelines and standards for content development to resolve customer calls quickly?
- Do you ensure that KMT content is updated, accurate or removed if not relevant?
- Does your organization add new content, update inaccurate content and remove obsolete content on a regular and timely basis?
- Do you allow CSRs and customers to contribute to content?
- Do you analyze desktop application usage for content usage?
- Do you know what desktop screens CSRs use?
- Does your desktop application have a positive impact on FCR?

Desktop Application – FCR Success Story

Company Description

Comcast Corporation (Nasdaq: CMCSA, CMCSK) is a global media and technology company with two primary businesses, Comcast Cable and NBCUniversal. Comcast Cable is the nation's largest video, high-speed Internet and phone provider to residential customers under the XFINITY brand and also provides these services to businesses. NBCUniversal operates news, entertainment and sports cable networks, the NBC and Telemundo broadcast networks, television production operations, television station groups, Universal Pictures and Universal Parks and Resorts. Visit www.comcastcorporation.com for more information.

The Einstein Evolution

We're using our technology expertise that has created innovative products and services and applying it how we provide service and support for our customers. To that end, we truly believe that you simply can't have a great customer experience without a great employee experience. And since our thousands of employees are the face of Comcast, they need the right tools and answers at their fingertips in order to provide a great customer experience. Therefore, the more that we invest in our employee solutions, the better we can influence our customers' experience with us. Because of this fundamental belief, in 2011 Comcast began a game-changing initiative that will ultimately span more than 5 years: To consolidate more than 20 unique desktop applications into one (1) universal employee application that would be consistent, simple, smart and, most importantly, that our employees would love using it every day. Einstein is that solution.

A Time of Transformation

While the cable industry is well-established, our services and the way people use them have changed more in the last five years than in the past five decades. Moreover, initially the cable product offering was just simple video service but in order to meet the changing needs of our customers, our products and offerings have grown in breadth and complexity. This growth and innovation meant that we needed to ensure we had internal systems to both sell and support these products and services. That led to a multitude of disparate applications employees had to maneuver between depending upon the type of customer inquiry and the geographic location of the customer and of the employee. We knew that in order to achieve our goal of creating a best-in-class universal user interface (UI), it would require not only technology innovation and investment but also considerable focus on process standardization, governance and change management to help our employees through this transformation.

Building a Better Solution

As we first contemplated our objectives and business requirements, we vetted existing applications from well-known vendors. It would have been far easier to buy an existing application versus build a custom application nearly from scratch but in the end, all of the off-the-shelf applications we evaluated would have needed major customization in order to meet our objectives. So, we decided to build our own application: Einstein. At the core of Einstein is the concept that all of the information we present to our employees should be, to the greatest extent possible, context-driven so that it is relevant to both the employee and the customer. This means that unlike traditional desktop applications which tend to silo functionality into different applications (e.g., a sales application vs. service application vs. knowledge base), we integrate all functions an agent needs to do their job in one universal application. For example, we deliberately do not have a standalone knowledge base. Instead, it is integrated with customer account information and other tools and information to support customer inquiries. We have expanded the concept of "knowledge" to include ANY information an agent needs to support a customer - not just a help article. And, we firmly believe that with the right solution, a "search" will hopefully be the last thing an employee needs to do because we've effectively presented the information they need, when they need it. In this way, we use our knowledge base strategically in order to save time for both employees and customers.

Working Smarter

Beyond that, because of the way we've architected Einstein, we have far more sophistication around intelligence and automation than we've ever had before. For example, we can use correlated information we received about calls and customer satisfaction to understand which of our troubleshooting process flows are most effective when a customer calls. We can also see which process flows we need to take back to our technology teams for improvement - or where we need to provide more direction to our employees about next steps. We can also automate certain steps in the process flows, saving time and improving the experience for both our customers and employees. This is a great example of where we are leveraging both science and technology to create smarter solutions.

Enabling the Omni-Channel Experience

We also are deliberate about ensuring we are leveraging the same capabilities across all of our internal and external applications and channels. For example, we share Einstein with our technicians so that they can have access to the same information and tools our call center agents do. And, we are able to share the same content and information across other support channels. Our website, Comcast.com, shares our same knowledge base as does our Business Class channel. We are leveraging the same content and troubleshooting tools in our new self-service apps like MyAccount as well so that we present consistent answers across all our channels. The integration with our self-service content was very important. By doing this, we were able to provide employees the ability to email help and support articles from Einstein that reference a link to the page on Comcast.com, thereby driving customer adoption of self-service - another critical goal.

By Employees, For Employees

A large part of our strategy is to manage our internal customer care applications as products and apply product development management principles, including engaging

UI designers and performing usability research and testing. All kinds of practices that you would normally just hear about in external consumer facing product development, we've applied internally as well. This means that the same teams that have developed our Emmy-winning X1 Guide are now helping to evolve the Einstein UI design to make it even more intuitive for our employees.

We spend a lot of time in our field organizations and call centers with our employees to get a feel for what's going on right now. They have so many ideas and we mine that information and bring forward the ones that will be revolutionary in this space. And we spend a great deal of time with our sales and service channel leadership across the organization to ensure we are building a solution that will deliver on the needs of our business - now and in the future. In fact, because employee engagement is such a fundamental part of our solution, our tagline is "Einstein: Designed by and developed exclusively for Comcast Employees".

Appendix: The Einstein 5-year Roadmap

Phase 1: Einstein Knowledge - Implementation Completed: 2013
Feature Highlights:
- Key Customer Account Information/Indicators
- Fast and Accurate Search
- Ability to Email Content to Customers/Employees
- Content Shared Cross-channel
- Rights Driven Access

Phase 2: Einstein Service - Implementation Completed: 2014
Feature Highlights:
- Search by Symptom
- Automation via APIs Built into Interactive Troubleshooting Guides (ITGs)
- Non-linear Troubleshooting Capabilities
- Device Diagnostics and Toolkits

Phase 3: Einstein 360 - Implementation Target: 2015-2016
- Fully integrated sales and service application

Appendix: Real Employee Feedback

- "This tool is great - everything is on one screen."

- "It's great, I like it. You don't have to be an Einstein to use it."

- "It's a lot more user-friendly and fluid. It's easier and combines multiple applications, which is saving me 3-4 minutes by not swiveling across multiple screens."

- "I don't have to look for troubleshooting, it's right in your face."

- "The new functionality in Einstein Service has rocked my world. I'm empowered now. Being a new supervisor, this really helps."

- "As a tenured agent, I really like it. This tool is also awesome for new hires. It'll standardize things across the three centers here in Washington."

- "Einstein is great! It keeps me on the right path for troubleshooting the customer's symptoms. Einstein makes me look forward to coming back to my desk!"