Omni-Channel Explained

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 explain omni-channel, you will likely get 20 different answers. Some will say omni-channel is the same as multi-channel, but to many <u>omni-channel is multi-channel customer contact handling integrated with CRM (Customer Relationship Management) applications along with the ability to seamlessly move between interaction channels</u>. Omni-channel also includes many other new customer interaction capabilities like bot automation, co-browse, video integration and visual IVR's (Interactive Voice Response). CRM integration and multi-channel solutions have been evolving for many years and both provide a broad range of valuable features, but when CRM integration and multi-channel are seamlessly fused together along with other new capabilities, 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 (Return on Investment) 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 just from the cost savings generated by a reduction in call handle times. But when you also include increases to customer satisfaction due to shorter handle times, the ROI increases greatly. 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, contact handling automation via voice and chat bots, mobile application integration, outbound contact campaign management, and intelligent agent assist scripting inside the agent workspace.

25 years ago, **multi-channel** meant email and web chat as customer contact channels, but these contact channels were typically handled as standalone channels.   Multi-Channel has evolved to provide blended routing, handling and reporting capabilities that allow agents to handle a mix of voice, email and chat contacts in an intuitive agent workspace that keeps agents highly productive and utilized while also ensuring customers are being serviced effectively. Web chat has also evolved to include other message based interaction channels like SMS/mobile text, Facebook, Twitter, WhatsApp and mobile phone applications with an embedded chat feature for customer service. In addition to more message based interaction channels, co-browse, video, callbacks and outbound communications were added 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 that are frictionless for customers and efficient for agents.

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/text, Facebook Messenger, WhatsApp,…

CRM Integration + Multi-Channel = Omni-Channel

Like omni-channel, the definition of CRM varies 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 department specific business applications that contain pieces of customer data and these applications generally have user interfaces tailored to the departmental user and the data contained within. Many organizations also use industry specific applications like Epic or Cerner for healthcare patient management and Jack Henry or Fiserv for financial records

management. 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 CRM applications be consolidated into one singular CRM application before implementing some omni-channel solutions. 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, I will refer to the collection of multiple applications that house customer data as CRM applications. This means that a CRM screen pop may be a pop to 2 or 3 different CRM applications and customer journey activities may need to be logged into 2 or 3 different CRM applications and those customer journey activities can be for any contact channel. CRM screen pops and customer journey logging can also be extended to non contact center knowledge workers who handle high volumes of interactions with customers – just not via contact center queues or campaigns.

Self Service

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 strategy. The number one self-service solution is an organizations' web site or mobile application and most customers will visit an organizations web site first to get questions answered. Thus, it is critical that organizations have a process to regularly update FAQ's and knowledge bases. Many organizations are now enabling an AI based chat bot to help navigate the FAQ's and some are taking their AI bots further and integrating them with CRM applications. Voice calls, both inbound and outbound, are also now enabled with self-service options through natural language voice bots that utilize integration with CRM data.

Channel Hopping & Multi-Modal

Customer interactions need to allow customers to transition between interaction channels or add channels in a frictionless manner. The ability to move easily between interaction channels is typically referred to as channel hopping and the ability to utilize more than one channel concurrently is referred to as multi-modal. A web chat may need to transition to an outbound call where the agent may use SMS to authenticate the customer. An inbound voice call may need to have a video stream and screen sharing added to increase communication effectiveness.

An outbound SMS notification may result in an inbound voice call that may trigger a follow-up email. An email may trigger an inbound chat session with a chat bot that then needs to transfer 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 video kiosk interaction may result in setting up a scheduled callback and an SMS confirmation of the scheduled callback date and time. An inbound voice call may have a coordinated visual IVR enabled so that the customer is interacting with a web site in conjunction with voice prompting. Customers can also be prompted on their mobile device for a fingerprint to authenticate themselves during a voice or chat interaction or their voice or device print can be used to more quickly identify themselves and to increase customer data security. All of these channel hops, transfers and added channels need to ensure context is shared so that customers do not have to repeat information already provided to the web site, bot, SMS app or previous agent. 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 accurately used to measure quality and identify trends. This wide variety of customer interaction scenarios is why omni-channel is often mis-understood and why it's important to have a robust contact center system that provides support for the desired omni-channel and multi-modal interactions with automation and the necessary CRM integrations.

Agent Workspace

While agents typically only handle one voice call at a time, it's critical that agents can handle multiple non-voice interactions concurrently. For message based 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 views 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 recent development in the realm of omni-channel is that customer service can no longer be viewed as simply automated or live. Modern contact center systems offer ways for bot automation to be applied in real-time to assist live agents in responding to inbound voice, outbound voice, chat or email interactions. Agent assist helps to increase both agent productivity and customer satisfaction.

Outbound Call and Contact Blending

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. Customers with upcoming appointments or policy renewals may need to be called to discuss important details. These outbound calls and callbacks need to be blended with other customer interactions and an intelligent campaign management and call blending strategy is required to ensure new inbound contacts continue to be serviced in a timely and customer friendly manner. 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.

Multi-Channel Reporting

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 call recordings and chat/email dialogues need to be linked to CRM records. Workforce Management also needs to factor email and chat interactions into forecasts and schedules by accurately understanding when work tasks are related and part of a previous interaction.

Omni-Channel Planning

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 composed of many smaller projects, each with a justifiable ROI. Proper planning of these projects requires experience with implementing robust omni-channel solutions. If you try to do everything at once, the project often becomes too complex and then no improvements to agent productivity and customer satisfaction get implemented. It's best to <u>pick the low hanging fruit</u> while also working on plans for getting the rest of the fruit in later projects. So, the question then becomes -- what is the low hanging fruit (i.e. first omni-channel project)? There are likely many very good omni-channel projects to choose from, but 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 to help customers easily and efficiently interact with your organization. Easily means being able to choose their preferred interaction channel and being able to switch between interaction channels as needed. Efficiently means having logical workflows with contextual 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 increase customer satisfaction, agent productivity, revenues, business resilience, and profits.

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