ttec®

Make Your CX Efforts Sing with Channel Orchestration

4 keys to successfully integrating traditional and digital channels for CX and operational excellence.

Overview

Companies get it. Customers want fast, convenient, and frictionless support. That's why businesses are investing in digital transformation initiatives that improve the customer experience. From social media and mobile apps to chat, video, and voice, there are many ways for businesses to support customers. However, it's not uncommon for customers to miss or ignore some of these tools. A focus on channel orchestration that aligns the best channels to the right interactions is at the core of a successful digital transformation.

The good news is there are ways to solve these issues with robust data analytics and a deep understanding of customer needs and behavior.

Read this whitepaper to learn:

Why customers continue to make voice calls—even when better options exist

How channel orchestration enables companies to balance customer expectations with business needs

How a financial services company used channel orchestration to save nearly $3 million annually

How to successfully apply channel orchestration to your organization's needs

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Work smarter, not harder

Though voice calls are still the most common route for a majority of customer service and other brand communications, customers just want their problem solved quickly, regardless of whether they're communicating with a human or a bot. Yes, some people prefer human touch, but others are fine with as little human intervention as possible. That's why bots and self-service options are on the rise.

However, bots have limited uses—the average bot can only respond to straightforward questions and perform simple tasks. As a result, many customers turn to what's familiar: making a phone call. This tendency isn't limited to Baby Boomers, either. In fact, millennials call their bank at nearly three times the rate of older customers, according to a study by Bain & Company.

But it can be equally frustrating to wait several minutes just to ask a quick question or be forced to repeat questions multiple times.

This leaves companies with an undesirable scenario: spending a lot of money to deliver a poor experience to the customer. What's more, numerous studies have shown that consumers will switch providers after just one bad customer service experience. More companies are therefore coming to the realization that they need to overhaul their customer experience and provide customers with the right kind of support, in both digital and traditional channels.

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How channel orchestration can help

Adopting the latest contact center technologies and tools to modernize the customer experience is one thing, but it's another to create a seamless experience that effectively integrates multiple traditional and digital support channels to balance customer expectations and business needs.

Just as an orchestra is composed of various instruments, channel orchestration brings different interaction channels together to perform harmoniously for the customer. As a result, customers receive faster and more effective service. What's more, adding operational efficiencies eliminates extraneous uses of company resources and employee effort to increase savings.

Channel orchestration leverages customer preferences for different channels while driving down costs and improving the quality of the experience.

4 keys to successful channel orchestration

Partnership

Collaboration and open dialogue between various stakeholders across channels and lines of business is important for developing initiatives in which everyone feels ownership. Appointing a dedicated change management team or point person to provide focus and keep track of the initiative's progress is also important.

Contact center operational expertise

Associates are at the heart of any changes made to the customer experience. A deep understanding of associate workflow, tools, and challenges is essential to ensure initiatives fit into the associate's daily flow and has a minimal impact on average handle time or call resolution.

Rigorous test-and-learn design

By addressing a measurement plan at the beginning of the process and designing a solid test-and-learn methodology, brands will be able to gain valuable insights during the pilot period and deep drilldowns at the end of the initiative to inform future efforts.

Detailed rollout plan

Providing a data-driven prioritization of future efforts and a fact-based business case based on quantitative insights helps gain senior leadership buy-in. The goal is to have all necessary parties ready, willing, and able to go live with the initiative and begin realizing the benefits as quickly as possible.

A note about metrics

Identifying the metrics to guide a channel orchestration strategy and measure its success is also critical. Before deploying the initiative, there are several key questions to consider: Which channels are my customers using? What would constitute success? If the goal, for example, is to transition customers to self-service, what percentage of customer transactions are already completed in self-service versus other channels like voice? And what percentage of those phone calls could be resolved through self service?

These questions will help determine the scope and direction of the initiative. Additionally, channel orchestration metrics are becoming more personalized and outcome-driven, versus being solely focused on operational effectiveness. For instance, in addition to focusing on average handle time, service level, and other operational metrics, companies are increasingly asking about outcome-based metrics like customer effort score, NPS, and customer satisfaction.

Channel orchestration in action

A financial services client was experiencing high call volumes in its contact center, despite efforts to digitally transform the customer experience. Although the firm offered robust mobile and digital self-service options (SSO), there was a group of frequent callers who continued to rely solely on the phone to handle all their banking needs.

To address the problem, we started with an evaluation of the call volumes. The analysis helped identify four customer segments, each with a different reason for calling. The four segments were: No self-service option; not aware of self-service; tried self-service unsuccessfully; and aware of self-service option but didn't try it.

Figure 1: Different strategies for unique customer segments

Customer segment	Percent of frequent callers	Strategy
No SSO for call reason	33%	Identify opportunities to create new SSOs
Not aware of SSO	20%	Educate about SSOs available to them
Tried SSO unsuccessfully	29%	Identify reasons for SSO failure and opportunities to improve current SSO offerings
Aware of SSO but didn't try it	18%	Explore reasons for reluctance to use SSO

Source: TTEC

Our next step was to launch a test-and-control pilot to identify the segments that were most likely to respond to a customer education program on the benefits of self-service channels.

– Frequent callers were directed to pilot or control associates. Control associates performed their duties as usual, but the pilot associates offered the caller information about the self-service options.

– The primary objective of the Caller Education Inbound Pilot was to deflect future frequent callers (digitally active and non-digitally active) to self-service/digital channels through a series of bundled communications and call treatments. This pilot provided frequent callers consistent, enhanced service throughout the pilot period.

– Pilot associates educated callers using advanced features such as co-browse, simulator, and other personalization methods. Associates also followed up with a personalized email to customers to reinforce the self-service functionality, or walked the customer through a demonstration of the self-service IVR.

Figure 2: Caller education pilot program steps
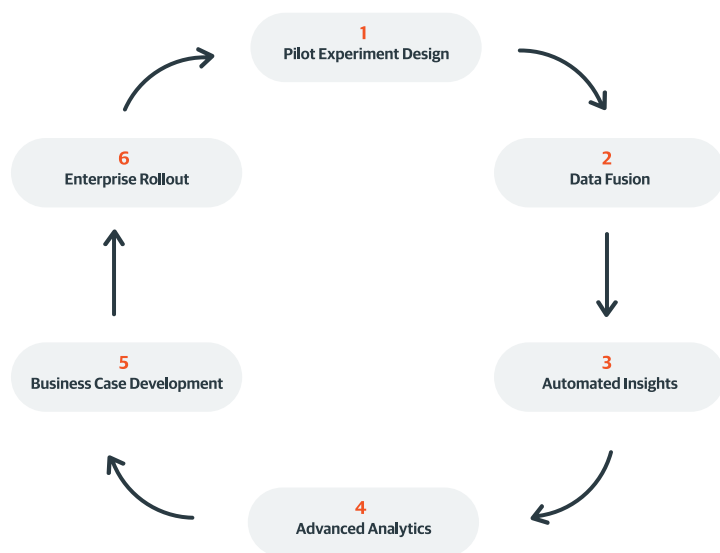
Source: TTEC Digital

1. **Pilot experiment design –** Rigorous test vs. control design for pilot program(s) to ensure readable and statistically significant results.

2. **Data fusion –** Automated data ingestion and integration of key data elements form disparate sources.

3. **Automated insights –** Near real time visualization of results highlighting collaboratively identified KPIs.

4. **Advanced analytics –** Deeper dive into insights beyond base KPIs into the who, why, what, when, and   how often as well as potentially combining unstructured VOC data.

5. **Business case development –** Financial impact assessment and go-forward recommendations.

6. **Enterprise rollout –** Enterprise-wide measurement design, recommendations for additional visualizations and recommendations for ongoing data fusion and measurement.

Having a test-and-control framework enabled us to drill into the data and produce insights that would have been impossible to produce otherwise. For example, we determined that caller education helped reduce call volume for only certain call reasons. This finding helped reduce the AHT impact of the program because associates only offered education where it reduced call volume.

Results

The Caller Education pilot helped reduce the 30-day callback rate by 18 percent. These improvements were sustained in 60-day and 90-day call back rates. Supported by these findings, we developed a data-driven rollout plan (prioritized by call reason) that provided close to $3 million in annual savings for the company.

By analyzing the reasons customers were calling and developing a test-and-control model to refine those insights, we identified the most effective way to address the problem—unnecessarily high call volumes—and direct callers to other options that better met their needs. This also enabled associates to focus on more complex consultative calls or account issues. As a result, customers received better service and the client reduced unnecessary costs (e.g., employing associates to answer tier 1 or rote questions).

Harmonious support hinges on customer understanding

Just as an orchestra depends on the collaboration and synchronization of its musicians, customer support channels must be aligned in order to provide optimal service. And if implemented correctly, channel orchestration can help companies meet customers' different needs in a harmonious—and cost effective—system.

Contact TTEC today to learn more about how to align the right channels with the right interactions to create a harmonious customer experience.

ABOUT TTEC

TTEC (NASDAQ: TTEC) is a leading global customer experience technology and services company focused on the design, implementation and delivery of transformative customer experience for many of the world's most iconic and disruptive brands. The Company delivers outcome-based customer engagement solutions through **TTEC Digital,** its digital consultancy that designs and builds human centric, tech-enabled, insight-driven customer experience solutions for clients and **TTEC Engage,** its delivery center of excellence, that operates customer acquisition, care, fraud prevention and detection, and content moderation services. Founded in 1982, the Company's 52,400 employees operate on six continents across the globe and live by a set of customer-focused values that guide relationships with clients, their customers, and each other. To learn more about how TTEC is bringing humanity to the customer experience, visit **www.ttec.com**.

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