Capture Customer Interactions: Capture Sales and Optimize Your Business

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More and more organizations are fueling the enterprise with valuable customer intelligence that has been gathered from customer interactions that have taken place through the contact center. Taking it one step further, today's forward-thinking companies are aligning in-depth process improvement (such as "root cause" analysis and Six Sigma programs) and direct revenue-supporting efforts with their contact centers to help drive business objectives. The key to successfully integrating the enterprise with the contact center is to establish a core customer interaction recording foundation and integrate process improvement and direct revenue-supporting activities based on the organization's customer service and intelligence gathering functions.

Establish a Core Customer Interaction Recording Foundation

Identify the reasons for capturing customer interactions. Before you're ready to rollout your customer interaction recording technology, your team must first determine the reasons for implementing such a system, beyond the traditional focus of improving service quality. Today, focusing on quality of service alone often does not deliver the value to the business that company executives expect. Are you capturing interactions for compliance purposes, process improvement, upselling and cross selling at the point of service, or for root cause analysis? By addressing these questions first, you'll better understand the criteria your measurement system should include, which will save time and money in the long run.

Ensure recording objectives map to contact center/corporate business drivers. Establish a project team comprised of employees at different levels, functions and skills to rollout the new customer interaction recording system, along with the processes and training that will support it. Participate in a pre-installation workshop that links your corporate, contact center and customer sales/service representative (CSR) objectives to ensure the criteria measured through agent evaluations and process analysis clearly supports your organization's overall business goals. Involve contact center agents, supervisors, managers, trainers and head office personnel, as well as sales and marketing, to establish a comprehensive approach. This cross-functional team can help prioritize the competencies that are part of the CSR evaluation process, as well as identify key measurement criteria for process improvement and revenue generating initiatives.

Capture voice *and* data. Many companies get only half of the overall service performance picture because they only record the voice transactions between agents and customers. By capturing both the voice and data – or screen sequences – taking place at the agent desktop, management can gain valuable insight into how effectively CSRs maneuver CRM systems, handle screen navigation and respond to customer needs. This provides more context for identifying agent training needs. Forward-thinking organizations also will try to identify areas for process and technology improvements by analyzing *how* agents are using contact center technology and determining *if* the technology is performing as expected or designed.

Determine how customer intelligence will be used. The recording of customer contacts in and of itself does not benefit your contact center; rather, it's what you do with the information that counts. Will you use the recordings to determine CSR training needs, such as how to cross-sell and upsell more effectively or provide executives with first-hand customer feedback? Determine what internal criteria you wish to measure, such as number of units cross-sold, problem solving skills, technical knowledge, use of technology resources and first call resolution. Then go through the same exercise from the customers' point of view. Take the final crucial step of looking at the most common areas of service or process failure and then address at least the top five areas of deficiency.

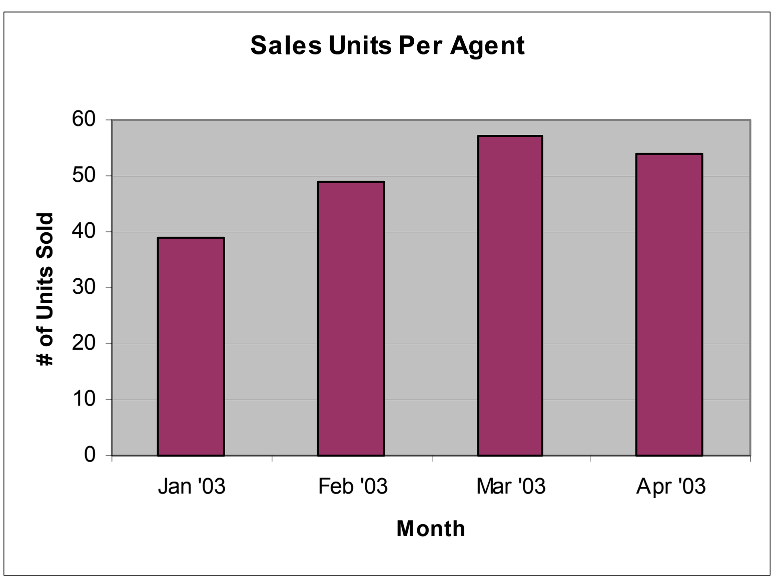
Correlate Direct Revenue-Supporting Activities with Organizational Customer Service and Intelligence Gathering Functions

Establish "Business Rules." Determine the types of interactions that drive your revenue, business and customer-focused goals. Then set up user-defined business rules to capture these contacts in order to make informed business decisions. Set up your system to automatically place those calls – whether they are related to sales for a new product or those that have resulted in effective upselling techniques – into the appropriate contact folders, enabling others to access and review them for business intelligence and best practices.

Identify best practices. It is key to identify top-notch service and sales contacts across different categories. This vital part of an organization's success is one that a customer interaction recording system can help with dramatically. For instance, in most inbound contact centers, CSRs are not "natural" sales people; usually, only a small percentage have sales experience and are comfortable upselling and cross-selling. By leveraging best practice sales contacts, CSRs can learn, emulate and improve their skills. Take advantage of today's technology that allows you to quickly deliver customized, best practices training to your agents.

For example: a major telecommunications company dramatically increased sales by capturing contacts and archiving those that demonstrated best practices for upselling. Its ability to use customer interaction recordings in a CSR training capacity helped reinforce sales/revenue generation behaviors. The result: the average cross sales per agent per month increased from 40 in the first month of training to 57 in the third month of training – representing an increase of 43 percent. Why? CSRs felt more comfortable selling when they applied best practice skills that were exercised by co-workers who used the same systems, worked in the same environment and sold the same offerings. While third party or off-the-shelf training content works, best practice learning using your contact center's own recording interactions is even more effective.

Results: Average number of cross sales per agent per month (based on number or units sold) increased from 40 in the first month of the training to 57 in the third month of training - an increase of 43%.



Demonstrate impact on the business' bottom line. Most importantly, contact center management can elevate their centers' profiles by showing how they are contributing to the organization's bottom line. Historically, call centers have been perceived as "cost" centers. Using customer interaction recording technology, they can now show how their groups directly impact revenue, as well as build brand loyalty through top-notch service. Using such a system to spotlight how contact center personnel are championing the customer and company cause, this important part of the business can be viewed as the strategic hub for customer intelligence.

Become a "change agent" – apply what's worked in the contact center to other areas of the business. The very same practices that have been optimized in the contact center also can be applied to other areas of the business that impact the customer experience. By using recording technology, other departments that indirectly touch the customer can capture and review samples of business processes and perform root cause analysis to determine clear action steps for improving effectiveness. As in the contact center, groups throughout the enterprise can learn much about how their processes impact customers, as well as how they can help contribute to positive customer experiences.

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About the Author
Greg Sherry has more than 15 years of contact center marketing and management experience, including several years working with one of North American's largest wireless telecommunications companies, where he was responsible for the process improvement and marketing groups, as well as implementing the company's first service quality and root cause analysis program for a 600-agent customer care and financial services contact center. He is currently Director of Americas Marketing and Inside Sales for Witness Systems, which provides the contact center industry's first integrated performance optimization software suite to help global enterprises capture customer intelligence and optimize workforce performance. For more information, contact the author at gsherry@witness.com.

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