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CUSTOMER CONTACT WEEK DIGITAL

SPECIAL REPORT:
CX AUTOMATION

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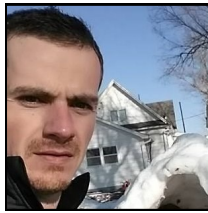
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AUTOMATION: A TICKET TO BETTER ENGAGEMENT

Do not sell automation short.

That, admittedly, may seem like an odd piece of advice. Automation, after all, has become a leading talking point within the customer contact community.

More importantly, it represents a major investment focus. A recent CCW Digital survey reveals that "reducing effort" is the only customer experience initiative that will command more attention this year.

Embracing the idea of automation is not, however, tantamount to fully appreciating its value. The customer contact community has a particular proclivity for viewing automation through a reductive lens.

Some view it strictly as a "sufficient" customer engagement solution. Since most organizations cannot afford to have live agents instantly engage with all customers for all issues, they embrace automation as a practical necessity. They only require bots or other forms of AI-driven self-service to be "good enough" to help customers when agents are not around.

Others view automation strictly as a mechanism for operational cost cutting. They exclusively focus on leveraging machines to automate the rote, repetitive tasks that do not require a human touch.

In both cases, customer contact leaders are ignoring the real value of automation: the ability to actually elevate engagement.

On the front end, automation is not simply an acceptable alternative for an organization that cannot afford to hire more live agents. In numerous situations, automation technology can actually yield a better experience for customers.

On the back end, automation is not merely a way to take mundane tasks off agents' plates. It can actually empower employees to more productively and more resonantly connect with customers. It, quite simply, can make them better agents.

By fundamentally transforming the contact center environment, it can also boost agent satisfaction. With agent happiness directly impacting customer satisfaction and agent retention representing a pivotal concern for today's businesses, automation ultimately represents a ticket to achieving a whole host of contact center objectives.

This report aims to shift the automation narrative. Instead of positioning automation technology as a practical solution for businesses constrained by tight budgets and limited resources, it reveals why – and how – automation can create positive value.

"Any company can make the most of automation technology if they are willing to make investments in the right technology that is going to help them create a customer-centric and solve for both the customer experience and agent experience," declares Bobby Amezaga of Salesforce.

"Certainly you have businesses that continue to think of the contact center as a cost center," says John Pompei of EA. "Then you have organizations that are truly thinking about the experience for customers – and they're investing in technology to do that. They know by doing so, customers are going to continue to come back.

"We want to make sure we are putting players in the best position to get issues resolved. We also want to put advisors in the best position to resolve those issues."

AUTOMATION: IDENTIFYING THE VALUE

Conversations about automation – like those for any technology investment – should begin with a simple question: why is this initiative worthwhile?

That question helps businesses distinguish technologies that are *functional* from those that are merely *exciting.*

Within the context of automation, the "why" question also helps organizations evaluate the true potential of a particular initiative. Which automation initiatives are merely about efficiency? Which can actually elevate engagement?

To identify those particularly valuable iterations of automation, we advise businesses to consider four perspectives.
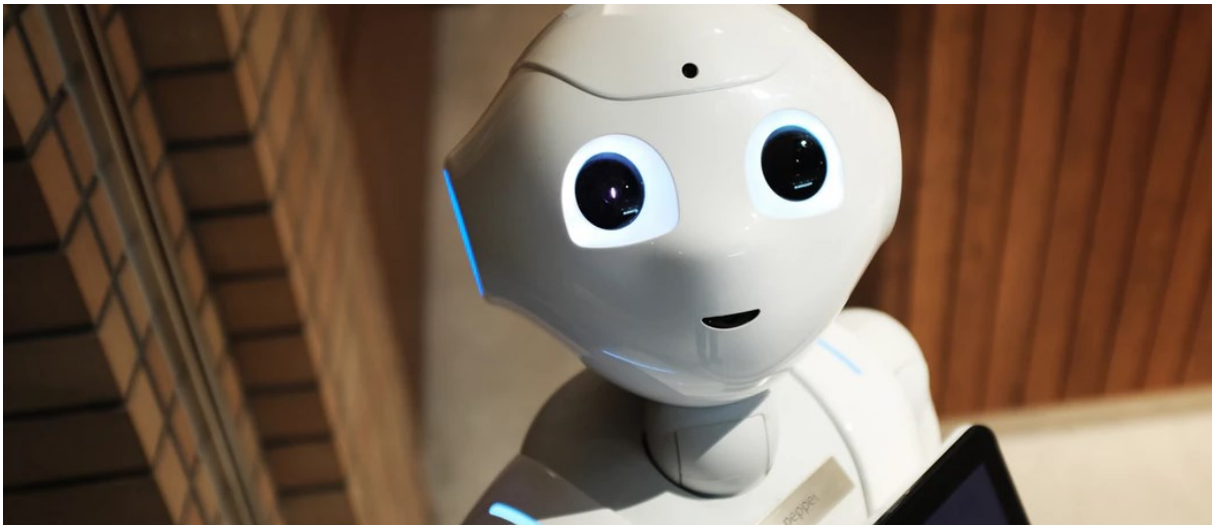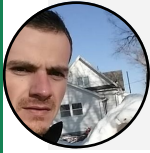

1. Understanding Your Customers

Some forms of automation benefit customers. Other forms of automation hurt customers. The point is that all front-end automation initiatives have an impact on the customer experience.

"You don't want people to hate interacting with [the bot]," stresses Sean Rivers of Republic Wireless. "You don't want them to feel ambivalent about it. You really want them to love it."

"Getting them to love it depends on [your] customers."

In order to understand the value of a particular project, it is therefore imperative to consider your customers' profiles, needs, wants and expectations.

> "You have to understand your customer base, what they're willing to go through and how long they're willing to sit there," advises Gene Howell of CURO Financial.

Howell is urging businesses to make automation decisions from an outside-in perspective. What is the customer trying to achieve? What must the customer endure in pursuit of that outcome? How can we make the journey better? How can automation specifically contribute?

This customer-centric approach to automation yields three noteworthy benefits.

It reveals needs. By evaluating the experience through the eyes of customers, organizations can most accurately identify the "pain points" associated with the engagement experience. With knowledge of what is broken, the business can correctly identify the tasks for which solutions (such as automation) are most urgent and vital.

It uncovers opportunities. Improving the customer experience goes beyond remedying pain points. It also involves creating *additional* value for customers. By understanding customers' *true* intentions and desires, organizations can identify opportunities to actually elevate the experience.

It establishes the correct vision of success. By understanding what truly matters to customers, organizations can evaluate performance through the correct lens. Instead of celebrating automation initiatives that *seem* pro-customer or *seem* to boost efficiency, they will know whether their efforts are truly creating more satisfying, more valuable experiences for customers.

2. Understanding Performance Bottlenecks

Chatbots may generate a great deal of headlines, but "process automation" also represents a pivotal focus for businesses.

Eighty-five percent of businesses plan to use automation to improve contact center performance this year; 30% say automation will play a *significant* role in performance management.

Interest alone will not, however, spur meaningful increases in performance. The success or failure of process automation initiatives requires proper execution.

Proper execution, meanwhile, hinges on an accurate understanding of the performance bottlenecks – and opportunities – within a contact center.

> "If the bot is so good at doing things fast, then why can it not make the agent faster," rhetorically asks Rivers. "Can the bot also help the agent propose solutions, take actions or provide clarifications? Can the bot make everyone more efficient and facilitate real, human interactions?"

> "[With an effective bot], you're going to have this great 'assistant' to help keep the agent be more efficient so they can work and talk to more people, which is the best of all worlds. I think the agents deserve to have this help as well - not just the end-user. I think agents will also be more receptive to it."

This evaluation process involves two phases.

The first is one of efficiency. Time is money. By requiring employees and managers to devote time (if not a considerable amount of time) to low value tasks, contact centers are ultimately losing money. They are not generating the appropriate ROI from their contact center investment and thus not running an efficient operation.

To correct this inefficiency, organizations must identify the internal challenges or tasks that prevent employees from devoting their time to high-value work. Upon identifying these performance bottlenecks (particularly ones that do not meaningfully benefit from a human touch), they can explore opportunities to automate the work.

The second is one of efficacy. In addition to consuming employees' time, poor systems and processes prevent them from successfully achieving their true objectives. Convoluted CRM systems or slow knowledge bases, as an example, prevent agents from accessing the information they need to properly engage with customers.

By identifying the connection between internal systems and engagement quality, organizations will uncover opportunities to use automation to make agents *better* at their jobs. They will not simply have more time for engaging with customers; they will be able to make the most of that time.

3. Understanding Your Agents

Troublesome processes and systems do not simply hurt performance. They can also adversely impact agent satisfaction.

Insofar as it can remedy those operational issues, automation can also be a pathway to a better agent experience.

To realize this potential, the organization needs to fully determine what *really* matters to agents. What, on a day-to-day basis, determines whether agents are content or displeased with the work environment? What *controllable* factors determine whether agents perceive the environment as a "temporary job" or a haven in which to build a career?

An agent-centric approach to automation essentially works in the same manner – and yields the same type of benefits – as the customer-centric approach.

It reveals needs. In a testament to the disconnect between leaders and frontline employees, only 24% of customer contact leaders believe their internal systems are "difficult" to use. Eighty percent, however, say their agents frequently complain about disintegrated, slow or burdensome systems. Leaders clearly require the "voice of the agent" to understand points of frustration within the contact center. Upon gaining that perspective, they can identify the factors most likely to cause disengagement or attrition – and most ripe for solutions like automation.

It reveals opportunities. Good agent experience endeavors minimize sources of agent frustration. Great agent experience endeavors maximize sources of agent delight. By viewing the contact center environment through the eyes of its agents, an organization can identify ways to make work life a legitimate source of happiness. That happiness, in turn, translates into successful interactions with customers.

It establishes the correct vision of success. Just as an organization should not use insular metrics to assess customer happiness, it should not use a boardroom perspective to evaluate the agent experience. Agents are the best judges of the frontline experience; an inquiry into agent demands and preferences will help the business succeed on that barometer.

"Part of the structure our leadership put in place when we started on our journey was to not only think about it from a player experience but from an employee experience," says Pompei. "When a player is going to ask a question, how is the employee going to feel? Are they going to be nervous or confident? We look at the [agent and customer journeys] as parallel paths. If we want the customer to feel a certain way, we want the employee to match that energy and feeling."

"Using AI to enable our advisors to find information at a click versus having to go and work through a complex knowledge management system can [help create that ideal feeling]."

"On one end, companies need to deliver a completely seamless, engaging, and automated experience for their customers," explains Amezaga. "On the other end, companies need to deliver a best-in-class agent experience that ultimately helps them deliver a killer customer experience and provides a path for career and professional growth."

4. Understanding Contact Center Strategy

Underappreciation for automation is a central theme of this report.

That lack of appreciation, as thoroughly discussed earlier, can manifest as businesses viewing automation as a way to cut costs rather than as a way to elevate engagement. It can also involve businesses viewing automation as a way to accomplish individual tasks rather than as a way to transform the overall customer contact strategy.

To truly maximize the value of automation investments, organizations must evaluate options from that broader, strategic view.

They must consider how automation – by virtue of its ability to change the frontend customer experience, optimize workflow and improve agent engagement – can favorably impact the overall operation. How can it change the role agents play when communicating with customers? How can it change the role supervisors play when training, coaching and supporting agents? In what ways can it help transform strategic elements like scheduling, workflow allocation and compensation?

To answer these questions, organizations will want to consider two perspectives.

The first is about consequences. Automation does not occur in a vacuum. As certain tasks are moved from man to machine, other auxiliary functions are directly or indirectly affected. Because these consequences can either increase or diminish the value of the initial automation project, an organization must take them into account when evaluating investments.

The second is about desires. Automation does not have to be a bottom-up endeavor. Organizations can also identify high-level changes they wish to make – and then introduce automation elements that will help facilitate that bigger shift.

AUTOMATION: ACHIEVING THE VALUE

By evaluating opportunities through the four key lenses – customer, performance, agent, overall contact center – organizations can fully embrace the *value* of automation. They will identify mechanisms through which automation can truly improve engagement.

> "The most valuable solutions will be those that can solve for these issues in a way that is built around customer data, can adapt easily to change, and that delivers a great experience both for end customers and internal agents and employees," elaborates Amezaga.

Opportunity does not, as the customer contact community knows all too well, guarantee reward. If organizations do not respond to customer, agent or contact center needs with the *right* form of automation, they will not achieve the desired benefits.

They may, in fact, compound preexisting operational challenges.

To ensure your automation journey progresses properly, CCW Digital presents a multi-step roadmap to success.

DEFINE – AND EMPHASIZE – HIGH-LEVEL RESULTS

In a sense, it is astounding that the customer contact community has so fervently embraced automation.

Contact centers, as a reminder, offer a great case study for "automation gone wrong."

Years ago, innovative contact center leaders pitched the idea of using automated IVRs to help customers resolve issues without agent support. The initiative was sold to customers as a way to avoid waiting on hold and to businesses as a way to handle more inquiries without hiring additional agents.

Unfortunately, neither "outcome" represented the appropriate goal. As a result, businesses implemented a technology that actually made the customer experience *worse* for customers and agents.

Customers may hate waiting on hold, they *also* dislike difficult, convoluted interactions that do not make use of natural language or offer quick resolutions. By fixating on the hold time concern, businesses neglected the *other* factors that mattered to customers – and ended up delivering a self-service experience that compounded customer frustration.

Ineffective and frustrating, few IVRs routinely solved problems for customers. They, therefore, did not markedly reduce call volume. Customers still required assistance from agents; the only difference is that the customers were particularly frustrated when they made contact.

The lesson here is that organizations must define the true, overarching outcomes they hope to achieve through automation. They must then evaluate their automation initiatives in conjunction with those objectives.

Customer-centric businesses, as an example, may define "increasing customer satisfaction" as a worthwhile goal. In doing so, they would ensure their automation initiatives – such as chatbots – truly deliver on that promise. They would consider all angles – do they reduce wait time, do they reduce effort, do they increase accuracy, do they produce a quick resolution – in constructing and evaluating their technology.

> "With the right tools, [automation can] provide a low-effort, personalized, and connected experience to customers across all channels," touts Amezaga.

If that is the vision, the organization must hold its automation technology to that standard. It should not celebrate a bot that reduces call volume if that same bot is neither easy for customers to use nor connected to other contact channels.

START WITH THE OBJECTIVE, NOT THE MECHANISM

Technology buyers are always at risk of falling victim to the "flash" over "functionality" conundrum.

That reality is particularly true in an automation context.

Numerous organizations are doing very *impressive* things with chatbots. Others are doing very impressive things with internal process automation. Since business leaders instinctively appreciate exciting forms of customer engagement and unquestionably value ways to make their contact centers more productive, it is easy to see why they may be blinded by superficial appeal.

Unfortunately, this instinct comes with a consequence. Some businesses may *over-automate* by requiring customers or agents to use technology when a human conversation is preferable. Others may *over-eagerly automate* by introducing automation without making the necessary preparations or considering the likely fallout.

Both risk *hurting* the engagement experience process – and thus undermining the very notion of automation.
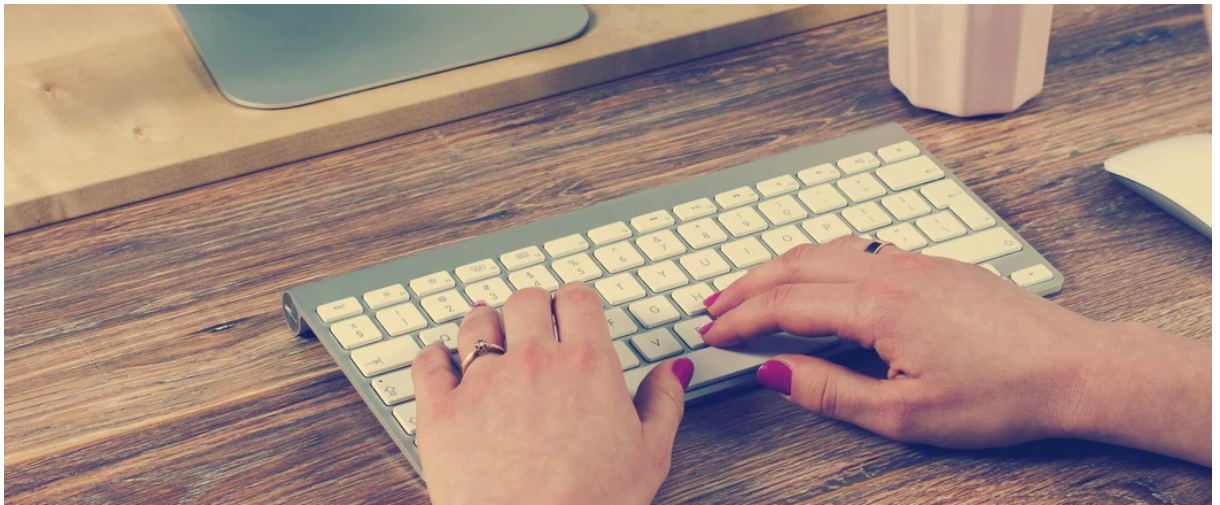
The correct approach is to *start* with the key objectives. Once an organization identifies the objectives it wants to achieve as well as the customer-facing, agent-facing or operational "moments of truth" that impact results, it can identify the best opportunities for automation. It can also ensure it is providing the right human and systemic support for the initiative.

"Having bots in the right place at the right time for the people who need it is really, really important," notes Rivers. "I think it's going to get more and more important over the coming years.

"Right now, it's really important to use them strategically and bring very fast 'wins' to it so people feel comfortable."

COMPARE THE OPTIONS

To truly elevate engagement, an organization cannot strictly focus on what can be automated. Its priority should be identifying tasks that *should* be automated.

While chatbots can competently handle many forms of engagement, they are *preferable* in certain circumstances. The best organizations – the ones that are truly looking to create elevated, customer-centric interactions – use automation in those specific situations.

There are indeed interactions for which a text-based, machine-driven self-service tool is better-suited than live agents.

Internally, automation should not simply be used for tasks humans do not need to be doing. It should also be leveraged to achieve tasks that humans *cannot* accomplish on their own. Automation tools are uniquely capable of handling tasks related to data crunching and adaptation to real-time challenges. When rolling out automation, those realms should take precedence.

IDENTIFY THE REQUIREMENTS

While one solution may perform the central task, the success of automation hinges on far more than a single piece of technology.

In order to make the most of automation, an organization must consider the *strategic* factors that impact the quality of the automation. Does the system have the data it needs to properly automate the relevant task? Does the organization have a human team to help "train" and optimize the automated system? Does the organization have a mechanism for monitoring the performance of the automation? Can the organization monitor – and act on – the insights gleaned from machine-driven processes?

> "Companies that invest in automation should also dedicate resources like analysts or admins to monitor and leverage the insights exposed through these processes," says Amezaga. "By doing so, companies can create additional features, benefits, and even products on the development side because they can create a faster 'customer to R&D' feedback loop."

Beyond managing the strategic element, the organization must also ensure its systems accommodate automation technology.

A popular form of automation, as an example, involves providing a data-rich "screen pop" to agents the second they initiate a call with a customer. As valuable as this type of automation is, it is only possible if the CRM and telephony system are integrated. Without valuable insights from the CRM, the contact center system will have nothing to automatically provide the agent.

The same challenge exists on the frontend. A chatbot cannot help a customer efficiently modify a purchase if it is not integrated with tools that allow it to instantly identify the customer (by phone number) and pull up the relevant order.

> "Deploying a chatbot that's not pre-integrated to customer data or channels and expecting it to answer every customer request [is a common 'worst practice']," notes Amezaga.
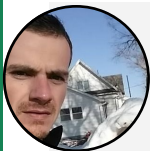
MANAGE THE CONSEQUENCES

No matter how narrow their immediate function, automation solutions ultimately impact other aspects of the customer contact operation. To ensure automation truly elevates engagement, organizations must successfully manage these consequences.

In the simplest sense, this endeavor involves ensuring automation does not adversely impact the customer experience. The potential for this unfortunate consequence is the greatest reason to avoid an efficiency-centric approach to automation.

"If automation is focused too heavily on back-end process, typically customer experience becomes a casualty," says Amezaga.

Howell references the IVR as the perfect illustration of this problem. Many view IVR (and all forms of self-service) as a way to optimize the operation — it allows the business to "support" customers without costly live agents. They do not, however, focus on optimizing the experience within the IVR and ultimately subject customers to a poor journey.

"That shows you how quickly customer service can be thrown out the window over not really considering what your customers want," declares Howell.

The consequences of automation, however, go far beyond the cost of mistakes. Even extremely effective, customer-centric automation initiatives carry significant ramifications for customers, agents and the business.

Effective frontend automation gives customers a robust option for solving problems on their own. That compelling self-service option will, in turn, affect when, where, why and how customers interact with the business. It will also affect their need to escalate to live agents.

Businesses must take these changes into account when designing – and optimizing – customer experience journeys. How can it condition customers to select – and feel comfortable – using automated options? How can it ensure customers who hit a wall while engaging in an automated channel can transfer to live agents?

By helping customers solve transactional matters on their own – and by removing menial, process-oriented tasks from the workload - automation also impacts the agent experience.

For starters, it may create a sense of fear about job security.
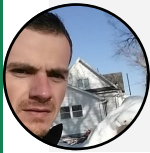
"Every time I automate something, I hear concerns from an agent," says Howell. "The first thing agents think is you're taking away their job and giving it to a robot."

That concern may be unjustified (fewer than 6% of organizations expect automation to eliminate agents), but it is still something customer contact leaders must address.

And even though machines may not be replacing agents, they will fundamentally change their roles.
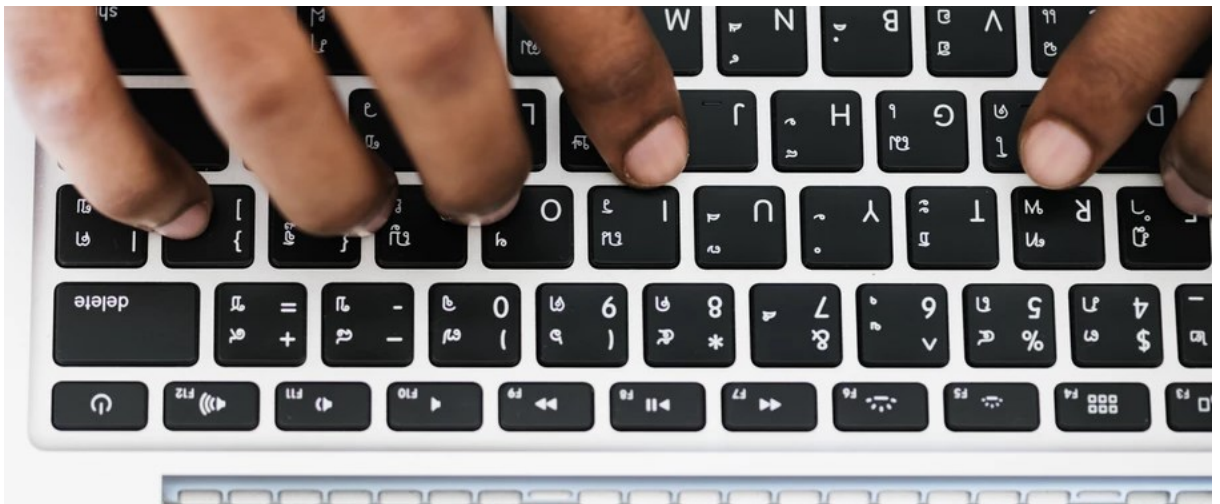
"As AI takes on higher volumes, and many of the simpler tasks previously routed to agents, the role of the customer service agent will necessarily evolve," explains Amezaga. "It is for this reason that we must keep our eye on empowering the agents of today and of the future with not only the tools, but also the skills that will be required to resolve more complex, challenging, and emotional customer issues in a dynamic environment."

As supervisors prepare agents for this new contact center normal, they must also prepare for their own transformations. By automating many rudimentary management tasks, automation empowers supervisors to spend more time directly connecting with agents and customers. Are they ready for that responsibility?

AUTOMATION IN PRACTICE: PORTRAITS OF ELEVATED ENGAGEMENT

Successful sales professionals know to "stop selling once you've made the sale."

This report technically violated that principle.

Organizations are already enamored with automation. They already recognize its potential to enhance self-service, reduce inbound call volume, trim operating expenses and boost agent productivity. They, more importantly, are already investing heavily in automation technology to empower their frontend experiences and backend operations.

By asking the customer contact community to view automation in a new light, the report risked ruining the sale. It downplayed the "efficiency" approach to automation in favor of an engagement-oriented approach. If organizations do not buy into that vision, they may question whether *automation* is truly worth the hype.

To ensure no such question exists, this report concludes with a look at various, value-driven "use cases" for automation. Each reveals a scenario in which automation is actually elevating the state of customer engagement.

For what it is worth, each example also offers value from an operational efficiency standpoint.

Can't Wait For The Human Touch

A busy executive realizes he will not be home in time to sign for a package. Unwilling to let it get stuck in shipping limbo yet unable to wait on hold with the delivery company, the executive texts a support bot. The system pulls up the record, proposes alternate delivery times, and makes the change.

Don't Want The Human Touch

After placing a delivery order at the local pizzeria, a customer decides she is in the mood for garlic knots. Instead of going through the hassle of calling the loud restaurant, identifying herself, waiting for the employee to pull up the order, asking for the order of garlic knots and waiting for an updated price, the customer can instead text her modification using an automated interface. Recognizing the number, the bot pulls up her order, adds the garlic knots to the purchase, shares the new price point and provides an updated delivery ETA.

Patient Experiences

A patient is dealing with a medical ailment in a private region of his body. Instead of engaging in an awkward conversation with a live person, the patient types the symptoms into a self-service portal. The portal identifies the likely issue, while also offering the chance to input insurance information and schedule an appointment.

"Delivering a seamless and guided patient onboarding experience in a self-service web or mobile portal that reduces customer effort and enables a seamless handoff to an agent should the customer decide to contact an agent," says Amezaga with regard to another form of automated patient experience.

Fostering Personalization

When a customer transfers to the live agent, the CRM system automatically gleans – and reports – relevant insights about the customer, purchasing history and ongoing issue. As the interaction progresses, the system assesses the customer's sentiment and provides the agents with recommended responses that are contextually and emotionally relevant.

Optimizing Case Management

"For high-volume case management, using machine learning to predict case fields, auto-triage, and intelligently route cases to the right agent at the right time, and preparing the case with the right information for the human agent to resolve the issue quickly," shares Amezaga.

Elevating Reporting
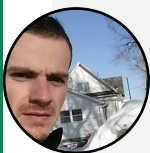
"[Many contact centers] are still preparing and sending out the same reports that we did in the 1980s," says Howell, who recommends automating the process. "[Automation can help with] going through the reports, looking for outliers, and ultimately taking work off supervisors … automation can instantly give you the answers that used to come at the end of an hour-long analysis meeting."

Improving Training

A learning management system is connected to the company's workforce optimization platform. When a particular agent's performance time drops below a certain threshold, it triggers an action from the LMS. The LMS automatically scans call logs and speech analytics data and either alerts a supervisor *or* sends relevant training material directly to the agent.

Revolutionizing Gamification

When CURO Financial's agents hit key performance goals, they receive currency that can be spent at a digital "call center market." The market includes items ranging from snacks to workplace perks. The automated gamification system allows CURO to offer the correct incentives (since agents are selecting their own "prizes"), optimize the budget ("prizes" are only bought if performance goals are hit) and eliminate human involvement (managers do not need to "run" the incentive program).

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Brian Cantor authors the special reports series. In his role, Brian leads all customer experience, contact center, technology and employee engagement research initiatives.

Brian additionally serves as managing editor and director for CCW Digital, which is the largest web publication and community for customer experience professionals.
CCW Digital's articles, commentaries, infographics, executive interviews, webinars and online events reach a community of over 140,000.

A passionate advocate for customer centricity, Brian regularly speaks on major CX conference agendas. He also advises organizations on customer experience and business development strategies.

2018 Special Reports Calendar

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Updated as of 3/1/18

Publish Date	Report Topic	Sponsorship Deadline	
Jan. 2	2018 Predictions	~~Dec. 15, 2017~~	SOLD
Jan. 16	Retail CX	~~Dec. 20, 2017~~	SOLD
Feb. 1	Omnichannel	~~Jan. 18, 2018~~	SOLD
Feb. 15	Messaging	~~Feb. 1, 2018~~	SOLD
Mar. 1	CX Automation	~~Feb. 15, 2018~~	SOLD
Mar. 15	Customer Intent	~~Mar. 1, 2018~~	SOLD
Apr. 2	Brand Reputation	Mar. 16, 2018	
Apr. 16	Outsourcing	Mar. 30, 2018	
May 1	Luxury	Apr. 13, 2018	
May 15	Agent Performance	Apr. 27, 2018	
Jun. 1	Customer Journeys	May 18, 2018	
Jun. 15	Self-Service	Jun. 1, 2018	
Jul. 1	FP3 Experience	Jun. 15, 2018	
Jul. 15	Outbound & Proactive Engagement	Jul. 2, 2018	

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Updated as of 3/1/18

Publish Date	Report Topic	Sponsorship Deadline
Aug. 1	Actionable Analytics	**Jul. 19, 2018**
Aug. 15	Customer Complaints	**Aug. 1, 2018**
Sep. 4	Chatbots	**Aug. 21, 2018**
Sep. 17	eCommerce & the Digital CX	**Sep. 3, 2018**
Oct. 1	Learning & Development	**Sep. 18, 2018**
Oct. 15	Remote Agents	**Oct. 2, 2018**
Nov. 1	Future Workspaces	**Oct. 18, 2018**
Nov. 15	Knowledge Management	**Nov. 2, 2018**
Dec. 3	Live Chat	**Nov. 16, 2018**
Dec. 17	CX Automation Pt. 2	**Dec. 3, 2018**

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Design Thinking
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Chief Customer Officer Exchange
May 6-8, 2018
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CCW Las Vegas
June 18-22, 2018
The Mirage, Las Vegas, NV
www.customercontactweek.com

Chief Experience Officer Exchange
July 29-31, 2018
Chicago, IL
www.chiefexperienceofficerexchange.iqpc.com

CX Week Canada
September 12-14, 2018
Toronto, ON, Canada
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