

A large, stylized speech bubble graphic in a dark grey color, positioned in the upper right quadrant of the page. It has a white dot at its top, representing a speech point, and is set against a background of overlapping red and grey curved shapes.

# **CONVERSATION MANAGEMENT**

A NEW APPROACH TO MULTI-CHANNEL  
CUSTOMER SERVICE

# Conversation Management

*a Macfarlane eBook*

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## Introduction

In the age of Consumer Empowerment, it is customers and not organisations that are shaping the future of customer service, with customers increasingly demanding:

- ✔ Access to the services they want, when they want them and wherever they are
- ✔ Comparable levels of service regardless of the devices they use
- ✔ Access to experts that understand their needs, provide the correct answers, and proactively manage their future needs.

Not only is this raising the bar with regards to service quality expectations but it is also leading to radical changes in the way that service is organised and delivered.

Rather than dictate how service is delivered, service operators now find themselves having to re-structure their contact centre resources and invest in new technologies simply to keep up with changing customer requirements.

Organisations are asking:

- ✔ What should a modern Customer Engagement Hub look like?
- ✔ How can we re-engineer processes to meet the needs of empowered consumers?
- ✔ What should those processes look like?
- ✔ How can technology help us build the contact centre of the future?

The latest omni-channel, analytics, workforce optimisation and artificial intelligence solutions may help organisations deliver faster and more consistent customer experiences - but are they the complete answer?

At Macfarlane, we believe that the answer is emphatically 'no' and that the answer lies in a new and more holistic approach to delivering personalised experiences. We call it Conversation Management.

## Background to Conversation Management

The advent of multi-channel interactions covering voice, email, SMS, web chat, web forms, social media and video introduces a great deal of added complexity to the job of a multi-skilled agent.

It is preferable to provide agents with the ability to manage interactions for more than one media as this allows peaks and troughs in the load across media channels to be managed more efficiently.

Some media channels such as voice, video and web chat (and possibly SMS and twitter if a back and forth “chat” is in progress) require immediate attention, whereas others such as email and web forms can usually afford to be parked and dealt with later.

**A major challenge facing contact centre operations is: how do they, as a minimum, maintain agent productivity in this more complex environment, and better still, how can they improve on it?**

We would argue that the solution to this dilemma lies in the ability to leverage technology to utilise greater levels of intelligence in supporting contact centre operations. Contact centre systems are themselves complex and fulfil a large number of operational requirements. Their underlying design is crucial in determining their ability to operate effectively in the new and fast changing contact centre environment. In particular, because the agent desktop is at the coal-face of a contact centre operation, the way in which it works to support the agent activity is most crucial of all.

Some contact centre suppliers have taken a system catering only to voice calls and bolted on the management of additional channels in a piecemeal manner. This usually results in a desktop that works differently for each channel, which is not surprising, as the underlying system design has not changed and suppliers have therefore had to adopt a non-uniform approach to the problem of creating and managing multiple channels.

We at Macfarlane know this because we had a voice only system called CallPlus which, in 1996, was the first software based system to be installed in the UK. We spent a lot of time considering how we could upgrade that system to deal with multiple channels and in the end decided that the only way to do the job properly was to develop a new system from scratch. This has resulted in our latest system that we call Contact+.

Adopting this approach allowed us to start with a clean sheet and consider exactly what was required from a multi-channel system. We considered the fact that not only did we have to embed the concept of multi-channel into every aspect of the system, from queuing and routing, recording and reporting, but that we also had to consider what challenges the agent would have in working in this environment.

We realised that a customer issue that starts with a phone call could then progress with an email followed by a SMS and possibly other types of interactions, chosen entirely by the customer.

Also, that with each communication, the customer would expect the organisation to not only receive the interaction, but also to recognise where it came from, what issue it was dealing with, and how it related to all the other previous interactions about that issue.

They would expect their own joined up series of interactions to be mirrored by the organisation as fully joined up, where each interaction was able to take the issue one step forward towards its resolution.

A solution to this requirement cannot be created using a disjointed approach to multi-channel management. What is required is a completely integrated approach where interactions are associated with a particular customer issue, and where agents are given sight of the history of interactions in chronological order.

What develops from this is the concept of a customer conversation, which consists of a series of interactions related to a particular issue, occurring over any number of media channels.

We called this concept **Conversation Management** and based the design of Contact+ around it. **Conversation Management** is an innovative concept embodying a new methodology specifically designed to meet the challenges faced by modern day multi-channel contact centres.

#### **Conversation Management:**

- Transforms a multi-channel system into a truly omni-channel one
- Provides agents with a simple yet powerful desktop interface to help them operate more productively
- Offers supervisors intuitive configuration and reporting by which to manage the contact centre operation
- Provides tools with which to measure and improve the multi-channel customer experience.

## What is Conversation Management?

Conversation Management is about becoming more customer-centric and focusing on the customer conversation.

It is about maintaining an awareness of the complete conversation regarding any particular issue, and not just individual interactions or dialogues.

### A conversation can:

- Be over any period of time
- Comprise any number of interactions
- Occur over a single or multiple channels (e.g. voice, email, SMS, web chat, web form, social media)
- Involve any number of participants

In practical terms - and supported by technology - Conversation Management is about:

- ✔ Treating each customer issue or query as a continuous conversation, rather than a series of separate interactions
- ✔ Using conversation case history to route contacts more intelligently e.g. using the same customer service agent for the whole conversation, rather than a different agent for each interaction
- ✔ Empowering agents to provide quick relevant responses by displaying a full history of customer interactions across all channels in a unified conversation thread on their screen
- ✔ Analysing and reporting on customer experiences and journeys across all media channels

It's a modern innovative approach to a modern problem.

## Benefits of Conversation Management

### Building Stronger Customer Relationships

One of the greatest benefits to be gained from Conversation Management is the ability for organisations to build stronger relationships with its customers. This is achieved by empowering agents with knowledge about the history of an issue and aiming to use a preferred agent for each issue across all channels.

The preferred agent knows the customer's journey and experience so far, by both being personally involved and having relevant information at their fingertips, and is therefore able to move the issue forward at each step. This gives the customer the satisfaction of feeling that progress is being made and removes the need for the customer to continually have to repeat themselves and go over the whole story yet again from beginning to end.

The on-going interactions between the agent and the customer offer the opportunity for the agent and customer to build a closer and more personal relationship, so that the customer feels they are getting a personalised and specially tailored service. This is in contrast to many customer service operations which appear to be purely process driven, where the processes never quite match the customer's issue.

Other benefits delivered by Conversation Management include:

#### 1. Continuity for the customer

- ✔ empowering agents with a full history of interactions across all channels allows them to provide continuity for the customer in their ability to understand what stage an issue has reached and what is required to move it forward. This removes the need for customers to have to repeat themselves
- ✔ using the same agent per customer for each issue allows an added element of continuity and personal service to be provided

#### 2. Clarity for the customer

With immediate access to the interaction history, agents can read back previous text from emails, SMS etc. or even play back previous recordings to callers to confirm what was said.

### **3. More intelligent contact routing**

Conversation case histories can be used to improve the way new interactions are handled in terms of queuing and routing.

### **4. Multi-channel analysis and reporting of customer experiences and journeys**

Insight can be gained into the customer experience across channels on an issue by issue basis or overall. Any number of tags can be set for each interaction and these can be used to track the customer journey from start to finish.

### **5. Faster, more relevant service responses**

With relevant information at their fingertips, agents are in a position to provide a higher level of service in terms of their ability to discuss an issue with the customer and move the issue forward.

### **6. Improved customer experiences**

By measuring and analysing the way customers interact across multiple channels, organisations can optimise their operation to provide an enhanced customer experience.

### **7. Increased agent productivity**

The simplified and integrated nature of the agent desktop combined with the provision of relevant historical information allows the agent to be more effective and efficient in delivering a high level of customer service, leading to increased productivity

### **8. Lower operational costs**

Higher productivity on the part of agents resulting in higher levels of customer satisfaction leads to a reduction in operational costs for the organisation.

# THE ABSOLUTE ESSENTIALS OF CONVERSATION MANAGEMENT

**Conversation Management** is a new and powerful concept that provides contact centre agents with the ability to view multiple customer interactions across multiple channels as a single unified conversation thread.



**1 - Empower contact centre agents by providing them with a full history of a customer's interactions.**

Across all channels, over any period of time and involving any number of participants.



**2 - Present information to agents as a Unified Conversation thread.**

Providing agents with instant access to all the information they need to resolve queries.



**3 - Enable customers to access the same agent they dealt with previously.**

Ensuring continuity in the customer interaction and service delivery.



**4 - Read back texts and play back previous call recordings to callers.**

Resolving uncertainty, ensuring compliance and providing clarity.



**5 - Route contacts more intelligently to the right resource.**

Using information contained within conversation case histories to route customers to the right resource (live agent or automated).



**6 - Analyse and report on customer conversations and journeys.**

And use the analysis to gain customer insight and improve future customer experiences.

## About Contact+

The Macfarlane Contact+ contact centre platform helps to manage and track customer journeys and transform customer experiences by providing:

- ✔ Conversation Management to link individual customer interactions across multiple channels into a single unified conversation thread
- ✔ A true omni-channel capability, delivering a fully integrated and equivalent high level of service across all channels
- ✔ A streamlined agent desktop specially designed to simplify a complex environment leading to enhanced customer service, higher productivity and lower costs
- ✔ A single consistent set of tools to configure and manage the platform for all channels
- ✔ Powerful and unified reporting and feedback tools to measure contact centre agent performance as well as the customer experience across all channels

Unlike conventional contact centre systems that handle one communication channel at a time, Contact+ takes an integrated approach to managing all customer contact requests on every channel in the same way, allowing you to deliver a truly omni-channel experience to your customers.

We place all interactions on all channels into a single universal queue to be handled according to the business rules that you set. And at the point that contacts are passed through to agents, the platform automatically provides a single view of ALL activity relating to a particular customer issue or case...across all channels, time periods and participants.

Armed with extensive information from multichannel conversation threads – plus data from other integrated systems – agents are able to focus on resolving customer issues and achieving goals rather than being distracted by complex processes and systems.

Our unique approach not only delivers a rich customer experience but also enables agents to serve customers faster, more accurately and with more empathy, helping organisations achieve a step change in performance and productivity. Contact+ delivers an extensive range of Live Agent, Self-Service, Compliance and Workforce Optimisation services from the Cloud or On-Site systems.

## About Macfarlane

Macfarlane has a long history of technological innovation which started over 20 years ago. With technology convergence transforming the IT landscape, we set out to find exciting new ways to transform business and improve customer service using the power of computing and telephony systems.

Throughout the late 80's and early 90's we were active in the area of automated computer telephony systems such as IVR, voice mail and conferencing and were one of the first UK suppliers to implement speech recognition. In the mid 1990's, we were the first UK company to install a software based call centre system, an approach which has now become the norm. Today, we are leading the way in applying the latest multichannel technologies and our own conversation management techniques to improve customer service experiences and First Contact Resolution.

Along the way we've attracted and developed some very talented people. Our software engineers, operations staff and consultants are amongst the most talented in their fields – and they are the inspiration and brains behind our latest Contact+ omni-channel contact centre solution.

We are proud of our long term client relationships and record of successfully integrating with the mission-critical systems and applications that they rely on.

For further information about Macfarlane contact centre products and services, please contact us:

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