

The Customer Experience Insight Series: Part Two

IT Help Desk

Conversation Management is a powerful new concept in customer service.

It enables contact centre agents to view multiple customer interactions across multiple media channels and different time periods as a single conversation thread.

The following IT Help Desk example shows how a contact centre agent can effectively manage a single ‘customer conversation’ involving multiple interactions and multiple media channels.

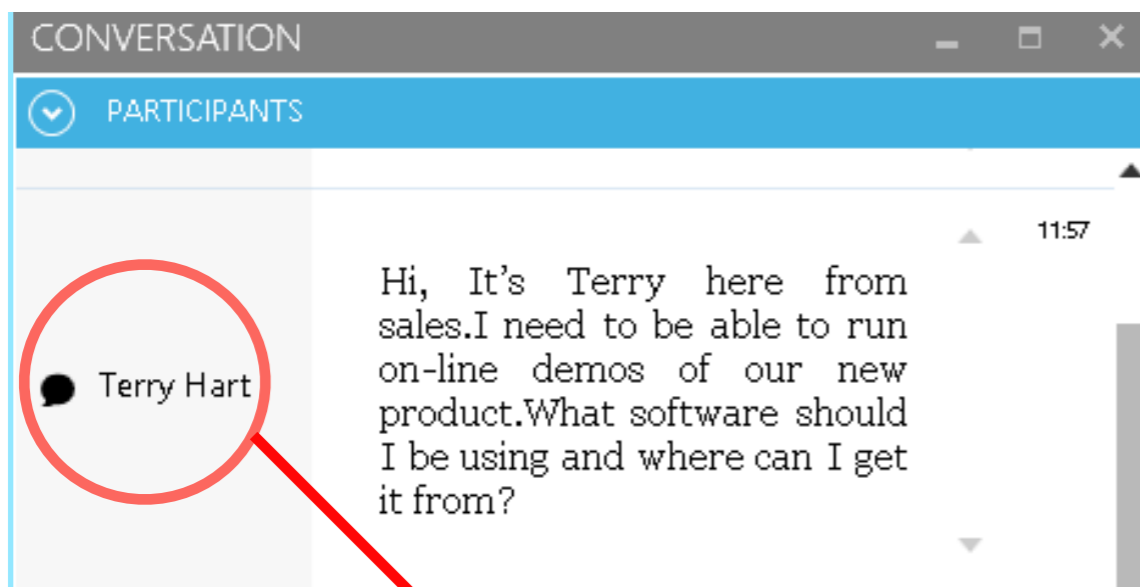
This is the toolbar running on the agent desktop.



Stage One



Agent status bar for Frank Perera. It shows a profile icon, the name 'Frank Perera', and a status dropdown set to 'Available'. To the right are five green boxes representing different communication channels: EMAIL (0), CIQ (0), SMS (0), VOICE (0), and WC (1). Further right, it identifies the 'Support Service' as 'Terry Hart' and shows a timer at '00:00:18 Live'. On the far right is a row of icons for 'Options', 'History', 'Consult', 'Transfer', 'Change', 'Tag', and 'Finish'.



A screenshot of a web chat window titled 'CONVERSATION'. The 'PARTICIPANTS' list on the left shows 'Terry Hart' circled in red. The chat message area shows a message from Terry Hart: 'Hi, It's Terry here from sales.I need to be able to run on-line demos of our new product.What software should I be using and where can I get it from?' with a timestamp of 11:57.

WEB CHAT

IT Planet Sales Executive (Terry Hart) wants to demonstrate the company's latest software product to his sales prospects online. He contacts IT Planet's IT Help Desk to ask what online meeting software he should be using.

Stage Two

M Frank Perera Available 0 EMAIL 0 CIQ 0 SMS 0 VOICE 1 WC Support Service Terry Hart 00:00:18 Live Options History Consult Transfer Change Tag Finish

CONVERSATION

PARTICIPANTS

Terry Hart 11:57
Hi, It's Terry here from sales.I need to be able to run on-line demos of our new product.What software should I be using and where can I get it from?

Frank Perera 12:01
Hi Terry,Go to www.itplanet.com/upgrades and download the GoToMeeting app.Call our Help Desk number if you have any issues.Frank

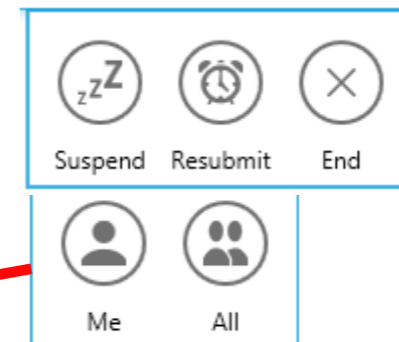
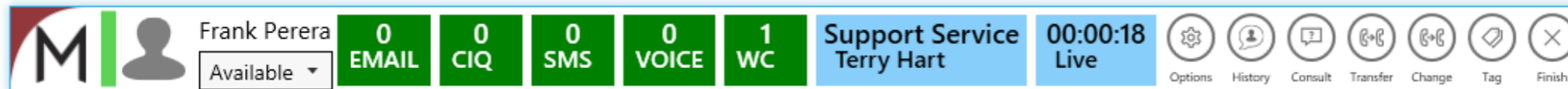
Type a message...

Agent (Frank Perera) responds.

WEB CHAT

Stage Two cont'd

After sending the web chat, Frank suspends the Conversation and marks himself as Preferred Agent in case the customer makes contact again.



**SETS STATUS AS
'PREFERRED AGENT'**

Stage Three

M Frank Perera Available 0 EMAIL 0 CIQ 0 SMS 1 VOICE 1 WC Support Service Terry Hart 00:00:34 Live Options History Hold Consult Transfer Change Pause Tag Finish

CONVERSATION

PARTICIPANTS

Terry Hart 11:57
Hi, It's Terry here from sales.I need to be able to run on-line demos of our new product.What software should I be using and where can I get it from?

Frank Perera 12:01
Hi Terry,Go to www.itplanet.com/upgrades and download the GoToMeeting app.Call our Help Desk number if you have any issues.Frank

Terry Hart 12:05
Voice Call

VOICE CALL

Customer downloads and installs the software but it won't run properly on his PC. He calls the Help Desk.

"Hi Frank. I did as you said but the software isn't running properly. Can you take a look?"

Stage Three cont'd

M Frank Perera Available 0 EMAIL 0 CIQ 0 SMS 1 VOICE 1 WC Support Service Terry Hart 00:00:34 Live Options History Hold Consult Transfer Change Pause Tag Finish

CONVERSATION

PARTICIPANTS

Terry Hart 11:57
Hi, It's Terry here from sales.I need to be able to run on-line demos of our new product.What software should I be using and where can I get it from?

Frank Perera 12:01
Hi Terry,Go to www.itplanet.com/updates and download the GoToMeeting app.Call our Help Desk number if you have any issues.Frank

Terry Hart 12:05
Voice Call

Agent responds:

“Sorry to hear that. I’ll send you a link via email so we can establish desktop sharing. Just tick the box that grants me access. I’ll take a look. Bye for now”.

VOICE CALL

Stage Four

M Frank Perera Available 1 EMAIL 0 CIQ 0 SMS 1 VOICE 1 WC Support Service Terry Hart 00:00:31 Live Options History Consult Transfer Change Forward Tag Finish

CONVERSATION

PARTICIPANTS

Terry Hart 11:57
Hi, It's Terry here from sales.I need to be able to run on-line demos of our new product.What software should I be using and where can I get it from?

Frank Perera 12:01
Hi Terry,Go to www.itplanet.com/updates and download the GoToMeeting app.Call our Help Desk number if you have any issues.Frank

Terry Hart 12:05
Voice Call
00:00:00 00:11:26

Frank Perera 12:22
Hi Terry, Here is a link to the software you requested:www.itplanet.com/desktop_sharing

Type a message...

Agent sends an email to the customer with a link to the desktop sharing software.

EMAIL

Stage Five

M Frank Perera Available 1 EMAIL 0 CIQ 0 SMS 1 VOICE 1 WC Support Service Terry Hart 00:00:31 Live

Options History Consult Transfer Change Forward Tag Finish

CONVERSATION

PARTICIPANTS

Terry Hart 11:57
Hi, It's Terry here from sales.I need to be able to run on-line demos of our new product.What software should I be using and where can I get it from?

Frank Perera 12:01
Hi Terry,Go to www.itplanet.com/upgrades and download the GoToMeeting app.Call our Help Desk number if you have any issues.Frank

Terry Hart 12:05
Voice Call
00:00:00 00:11:26

Frank Perera 12:22
Hi Terry, Here is a link to the software you requested:www.itplanet.com/desktop_sharing

@ Terry Hart 12:30
Subject: link to desktop sharing software
Hi Frank.Thanks. All sorted. Ready when you are! Terry

Type a message... EMAIL

Customer clicks on the link, downloads the software, ticks the box and sends agent an email to say he is ready.

The agent then helps to resolve the issue.

Stage Six

M Frank Perera Available 1 EMAIL 0 CIQ 1 SMS 1 VOICE 1 WC Support Service Terry Hart 00:00:08 Live Options History Consult Transfer Change Tag Finish

CONVERSATION

PARTICIPANTS

Terry Hart Hi, It's Terry here from sales.I need to be able to run on-line demos of our new product.What software should I be using and where can I get it from?

Frank Perera Hi Terry,Go to www.itplanet.com/updates and download the GoToMeeting app.Call our Help Desk number if you have any issues.Frank

Terry Hart Voice Call
00:00:00 00:11:26

Frank Perera Hi Terry, Here is a link to the software you requested:www.itplanet.com/desktop_sharing

Terry Hart **Subject:** link to desktop sharing software
Hi Frank.Thanks. All sorted. Ready when you are! Terry

Terry Hart Hi Frank! What's the PIN to log onto GoToMeeting application?

Type a message... **SMS**

Customer tries to log onto GoToMeeting software but has forgotten the PIN.

He leaves for his next meeting and on the way, sends a text message to the Help Desk.

Stage Seven

The screenshot displays a customer service interface. At the top, a header bar shows the agent's name 'Frank Perera' with a status of 'Available'. To the right, it indicates 'Support Service Terry Hart' and a live timer of '00:12:44'. A row of green buttons shows channel counts: 1 EMAIL, 0 CIQ, 1 SMS, 1 VOICE, and 1 WC. A toolbar on the right contains icons for Options, History, Consult, Transfer, Change, Tag, and Finish. Below this, a 'CONVERSATION' window shows a list of messages:

- Terry Hart: Hi, It's Terry here from sales. I need to be able to run on-line demos of our new product. What software should I be using and where can I get it from?
- Frank Perera: Hi Terry, Go to www.itplanet.com/upgrades and download the GoToMeeting app. Call our Help Desk number if you have any issues. Frank
- Terry Hart: Voice Call (00:00:00 to 00:11:26)
- Frank Perera: Hi Terry, Here is a link to the software you requested: www.itplanet.com/desktop_sharing
- Terry Hart: **Subject:** link to desktop sharing software
Hi Frank. Thanks. All sorted. Ready when you are! Terry
- Terry Hart: Hi Frank, What's the PIN to log onto GoToMeeting application?
- Frank Perera: Hi Terry, It's 6485. Hope the demos go well! Frank

A red circle highlights the final message from Frank Perera, with a red arrow pointing to the 'SMS' label below the conversation window.

Agent responds with a text message, providing the PIN number.

For further details about the Conversation Management capabilities of Macfarlane's Contact+ contact centre platform, please contact:

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