



Intelligent Call Handling For Service Success

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A few weeks ago, a colleague rang a well known computer manufacturer trying to restart his crashed computer. Two days, several calls, many reboots and one complete reinstall later, he finally got through to an experienced engineer. Twenty minutes on, the fault was diagnosed and his machine working again.

As customers, we see this problem all too often. From the supplier side call handling, particularly technical service calls, is difficult to deliver at scale. When it goes wrong, customers are left frustrated (and looking for new vendors), staff unhappy (looking for new jobs), and the supplier can end up incurring excessively high costs for repeat calls and, worse, unnecessary product returns. These costs – pure waste – can make the difference between winning and losing, or turn profit into loss.

Yet – as our clients find – it doesn't have to be like this. Somewhere in every company there is an expert, who does know the right answer. With effective help, this right answer can be offered up to every customer, every call. Even the most complex queries can and should be handled intelligently.

In this White Paper we describe problems encountered by our clients, particularly manufacturers of electronics and communications products and other areas such as IT where service delivery is complex. We explain why it is that existing solutions and technologies, while they can help, often fail to deliver the right result. Finally, we set out a blueprint for intelligent call handling: an approach which quickly and efficiently brings to bear the company expert's knowledge to solve even the most complex queries – for every customer, every call.

Call Handling Today – Far From Ideal

Call centre and technical support managers know very well the ingredients of a successful technical service call: an understanding and empathetic engineer listens closely to the customer, asks intelligent questions to diagnose the problem, then carefully guides them to a successful resolution: problem resolved and machine working – or, if it's truly broken, quickly on its way back to base for repair. Managers know too that, in most circumstances, first call resolution is the ideal, making for low cost service and for happy customers.

Easier said than done. Managers also know, all too well, the “mess of reality” which gets in the way. In the world as we know it, there are all too many inhibiting factors:

- Can't skill up agents quickly or cheaply enough: it takes time, sometimes years, to turn agents into technical engineers capable of managing a broad range of complex calls – and then there's a constant battle with staff turnover to keep them in place. Even with well tiered call centers, and optimized call routing, changes in call volume can quickly become unmanageable
- Complexity exceeds agent bandwidth: even the best agents just can't keep pace with all the problem variations and permutations their customers will encounter
- Constantly extending product range: as Marketing keep adding to the product set, they don't necessarily think of all the older versions out in the marketplace – or how they can be supported



- Pressure to get to market: what's more, with competitive pressures to get product to market quickly, processes and training to support new products is rarely fast enough: but if these are not done well, they can jeopardize a successful launch.

At the extreme, the consequences of inadequate technical support can be disastrous. We came across one company where a product launch encountered several configuration problems - technically, minor issues but as a result around 15% of customers could not use the product without help. Still, a 10 minute phone call could diagnose and fix most problems, so the situation initially appeared recoverable. Meanwhile, however, Sales had signed a major distribution deal and the product was shipping exceptionally quickly. Facing a torrent of service calls, Operations couldn't train technical staff fast enough and sales success quickly turned into a nightmare of expensive returns. In the event, the company was driven near to bankruptcy.

For most, inadequate technical support is not catastrophic but it can be expensive:

- Product returns: averaging around 2% of consumer sales, returns are always a nuisance. However, much of the cost is unnecessary: consumer electronics companies typically find that around one third of returns are found to be fault free. Each return, good or bad, requires two-way postage, probably several service calls, a technical engineer's diagnosis – and an unhappy customer less likely to buy again or recommend the product
- Multiple calls: with up to 30% of service calls typically repeats, it's clear that anything short of first time resolution is expensive waste
- Unnecessary training: 'just-in-case' staff training can account for 15% of costs, more with technical calls – better to provide support just-in-time when it's really needed; and
- Over-skilling: companies are paying more than they really need to keep their most highly skilled (and highly paid) engineers on the phone – just in case their skills are needed one day for that particularly difficult call.

Not surprisingly, companies look for tools which can help – with mixed results.

Existing Solutions Provide Some Help

Call centers support complex call handling with a number of tools: technology solutions in the main but also, frequently, manual. These do provide considerable help; rarely, however, do we find technical support managers completely satisfied with available solutions, particularly for handling the more complex calls.

Existing support solutions, we find, come in 3 main categories.

1. Search. Search approaches have become increasingly popular, not least as we've become accustomed to 'googling' on the web for information. With search, the call handler selects or infers key words from the customer's comments, then uses these to search a knowledge base. Like Google, this approach can be outstandingly good, and the agent will quickly find something that sounds roughly correct. If the problem is not too complex and the knowledge base not too large, then the agent will be fine.



Also like Google, however, the approach has major limitations: the agent won't always get lucky. In some situations the agent can easily get lost – e.g., where:

- The problem needs expert diagnosis – e.g., the fault could be one of 6 possibilities and detailed, structured questioning is needed to identify which; or
- There are simply too many items to choose from and the agent doesn't know where to start.

In these circumstances, a more structured approach, both to problem diagnosis and its resolution, is called for.

2. Scripting tools. Many CRM systems now come with built-in scripting tools. Like search, these bring a number of benefits: not least, the agent dialogue is better controlled, and problem resolution can follow a set path. However, most scripts are fairly limited and have trouble dealing satisfactorily with the more complex calls:

- Limited logic: they tend to offer only a limited range of logical outcomes, and hence not be very good at handling complex diagnostics,
- Not particularly user-friendly: scripting tools have a bad reputation among call centre agents, who find them disempowering and feel their conversations are unnaturally constrained. For example, clients often want to move backwards and forwards during a call, usually difficult with a defined script
- Data integration poor: typically, scripting tools are not designed to integrate: so they don't link up well with other customer data, or provide good contact histories
- No management information: rarely if ever do these tools allow managers to track calls and see easily which problems are arising and which answers succeeding
- Maintenance tends to be difficult and time consuming.

With such limitations, many companies have given up on technology support altogether and are relying on a combination of training and manual aids.

3. Visio. We actually find many companies use flowcharts (such as Microsoft Visio) to support call diagnosis and we regularly see flowcharts pasted on agents' cubicle walls, or folders of flowcharts sitting on their desk. Clients can be a bit embarrassed by this – they feel it's not the right solution, but short of anything better it is a real help.

The flowchart approach has real strengths. Chief among these is that it's visual: agents can immediately see the logic, and get an intuitive grasp of the 'shape' of problem resolution. (Interestingly, even if they are in effect following a 'script', making the whole picture available means agents immediately feel empowered.) The visual image also facilitates discussion, making it easy to discuss how best to handle and resolve calls, and to train new agents

Using such visual diagrams in this way does have severe limitations:

- Cumbersome: in large number, or with bigger charts, they get difficult to handle – even the best agent has only so much wall space, and thumbing through a folder while a customer is on the phone is difficult
- Generally incomplete: flowcharting is really a visual modeling tool, and we find that most are not capable of handling all of the possible exceptions which real live agents have to deal with
- Like scripting tools, flowcharts offer no possibility for data integration or good call management information.



In summary, there are a range of solutions for technical call handling: all have merits, but none provides an effective approach for handling complex call diagnosis and resolution. In designing a target solution, we can learn from all of these existing solutions – but we need to find a better approach.

Bring Expert Knowledge to the Moment of Truth

From our understanding of what works – and what doesn't – we now have a good idea of what makes for an intelligent call handling solution: one which brings expert knowledge to bear to help the agent at their moment of truth with a customer.

We can set out these as a set of criteria or requirements for the technical or IT manager tasked with finding such a solution. Such a solution must meet the needs of 3 distinct groups:

1. For the User: it must be easy to use, locate the right answer quickly and then guide correct resolution of the client's problem. Ideally, it should also be easy to save and access the dialogue in case the customer comes back for more help;
2. For the Expert: it must be easy and quick to set up – i.e., to create new answers to new problems. Ideally, it should also be easy to see what has worked well vs. badly and allow rapid changes in response to feedback;
3. For the Business: the business needs a solution which is flexible, easy to change as the business grows, not too expensive – and with a demonstrable payback.

Below we look at each of these in more detail.

1. User View. Easy to use and find the correct answer translates into a number of specific requirements for an intelligent call handling solution, i.e.:
 - Immediately easy and intuitive for Users to navigate – ideally, within a familiar browser view and sufficiently simple that an agent (or client) could 'get it' first time
 - Able to combine the best of both search and scripting:
 - Search to make an initial selection among many different possible areas (e.g., product type or class of problems)
 - Scripting to diagnose the problem and provide a clear decision guide to the correct solution
 - Visible decision path: lets the agent feel in control by showing the overall decision logic, ideally with the ability to go back and switch to a new route if the customer remembers new information or realizes they gave a wrong answer
 - Ability to save a call record: in case the customer is cut off or has to call back, so it's clear what's already been done
 - Ideally, provides ability to give feedback, so the User can tell their colleagues what works – and what may not.
2. Expert View. For the technical engineer and system designer, easy to use brings a different set of requirements:
 - Ability to map out call diagnostics and problem resolution in a simple and intuitive way using flow diagrams: ideally, like Visio, using a simple drag & drop approach rather than



- having to bother with system programming. Particularly attractive would be the ability for technical experts and call agents to 'draw' solutions together in workshops
- Ability to integrate easily with existing data and applications, e.g. for customer or product information
 - Ability to implement very quickly: normally a week or two is enough, but sometimes in a call centre a new, urgent need really needs to be dealt with in minutes.
3. Business View. Finally, for business managers, deploying a new solution in their environment, flexible and cost effective means:
- Uses web services standards to integrate easily with a broad range of CRM applications and databases
 - Completely scalable as the call centre grows
 - Has a low cost of ownership; and thus can show a
 - Demonstrable payback, ideally within a few months at recognized sites.

With such an ideal system, we believe, intelligent call handling can become a reality. To support their clients, IT solution providers now need to rise to this challenge.

Additional Information

If you would like information about how to improve technical call handling within your organization please contact us at via our website www.informavores.com or call us in the US on +1 800 773 3061 or UK and other countries on 0845 043 7643.