



**Proactive
Customer
Service:
How To
Do It Well**



Webinar

>> Thursday 10th October 2019



Proactive Customer Service – How to do it Well

1 Gather the facts

2 Think about... your customer

3 Orchestration



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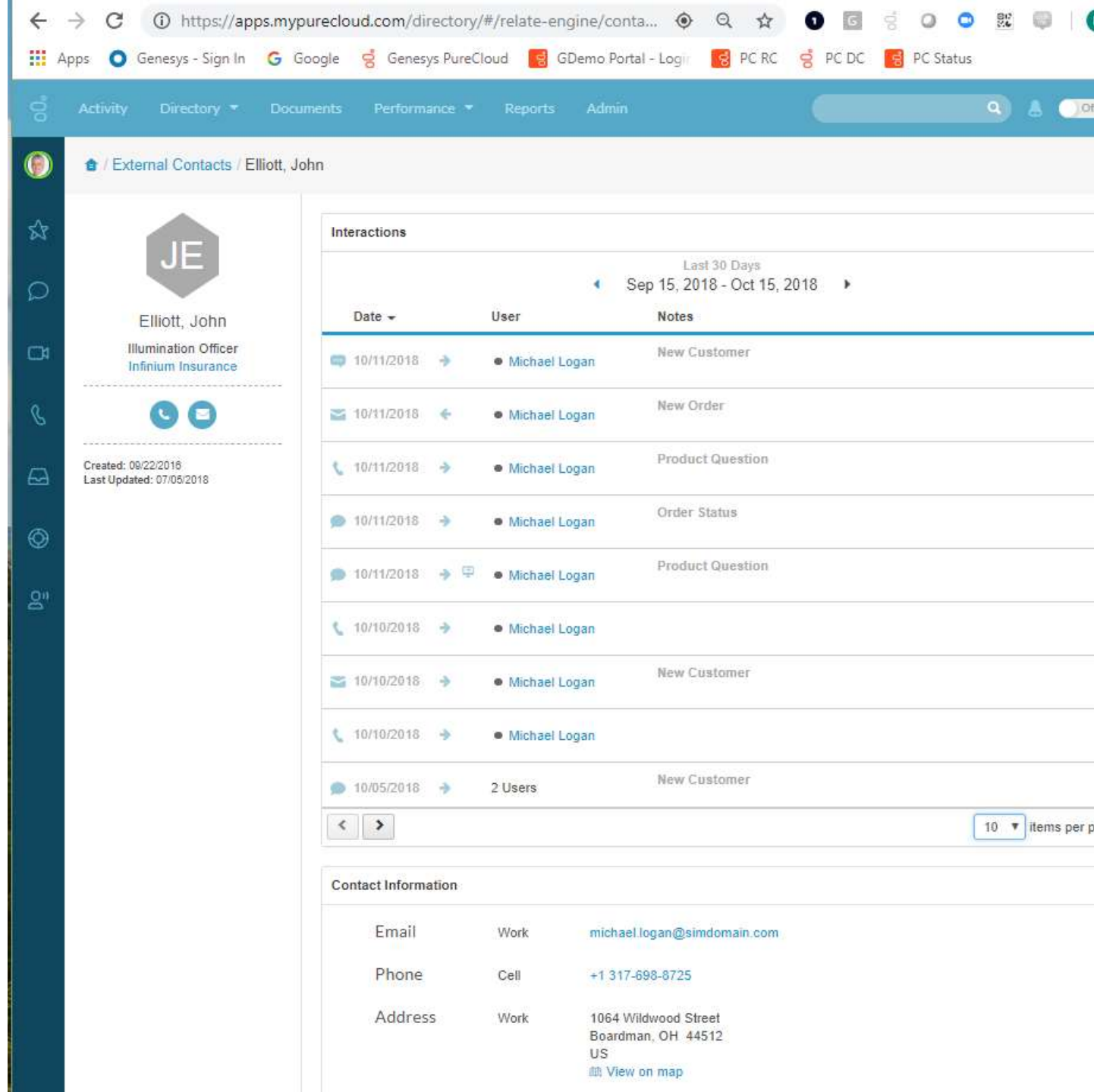


Collision of two Worlds



Remember everything

- Event based, External Contact profile
 - All prior interactions
 - Message
 - Email
 - Voice
 - Chat x 2
 - Etc.
- Associate unidentified Interactions
- Advisor “in step” with customers activity



Activity Directory Documents Performance Reports Admin

External Contacts / Elliott, John

JE

Elliott, John
Illumination Officer
Infinium Insurance

Created: 09/22/2018
Last Updated: 07/05/2018

Interactions

Last 30 Days
Sep 15, 2018 - Oct 15, 2018

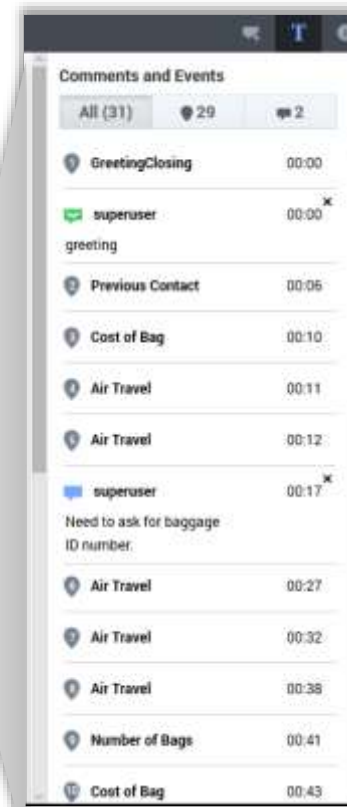
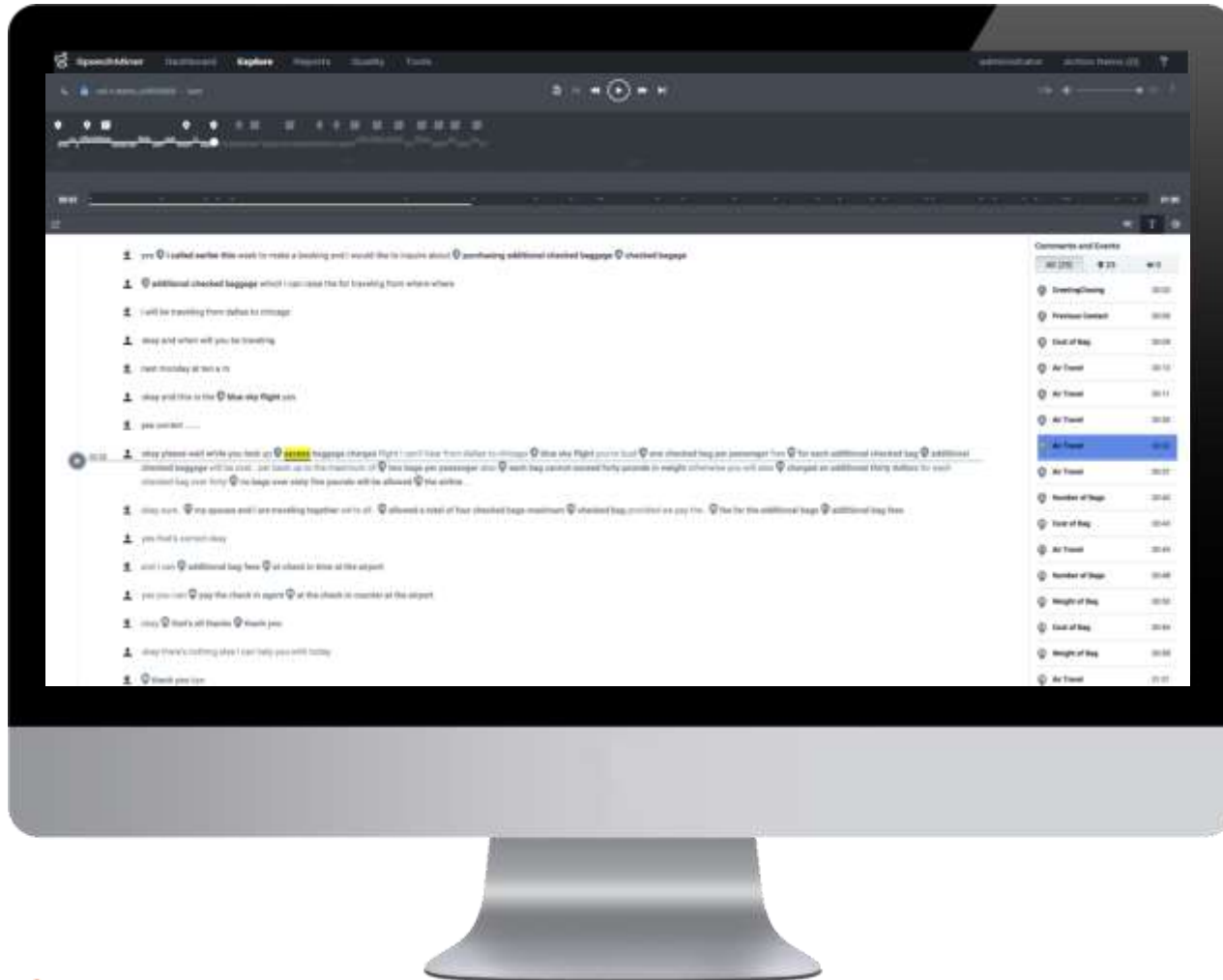
Date	User	Notes
10/11/2018	Michael Logan	New Customer
10/11/2018	Michael Logan	New Order
10/11/2018	Michael Logan	Product Question
10/11/2018	Michael Logan	Order Status
10/11/2018	Michael Logan	Product Question
10/10/2018	Michael Logan	
10/10/2018	Michael Logan	New Customer
10/10/2018	Michael Logan	
10/05/2018	2 Users	New Customer

Contact Information

Email	Work	michael.logan@simdomain.com
Phone	Cell	+1 317-698-8725
Address	Work	1064 Wildwood Street Boardman, OH 44512 US View on map

From Unstructured To Structured Data

“Tagged topics can be categorised and searched along with meta data and non-linguistic events to create meaning from otherwise unstructured data”



Full Transcript

Transcribed interactions highlighted and auto-scrolled during playback



Both sides

Supports stereo for Agent and Customer channel separation



Tagged Topics

Quick jump navigation through transcripts from player or event list



Non-Linguistic Events

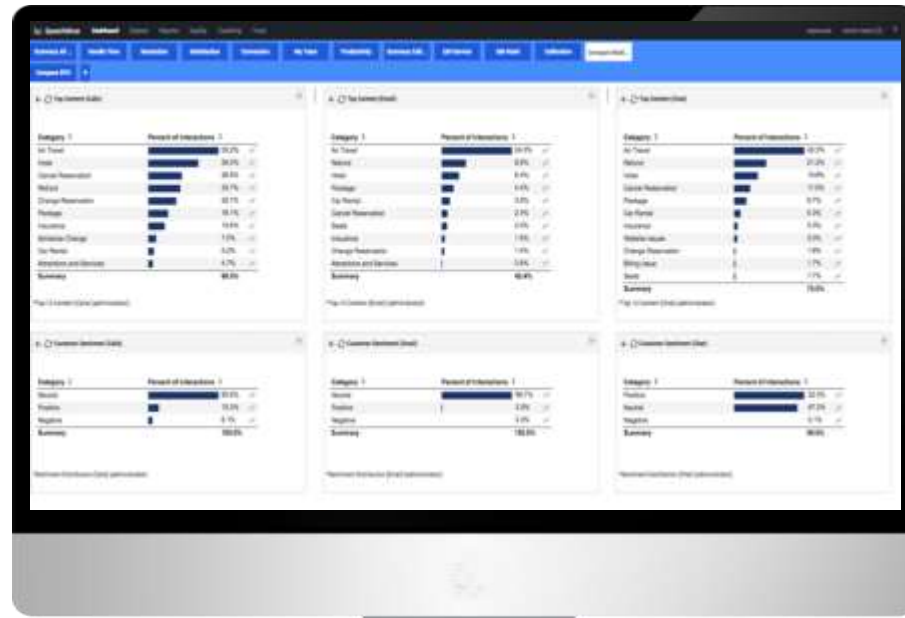
Silence, music, crosstalk and other non-linguistic events are highlighted



Sensitive Data Masking

Analytics masks out spoken digits or secure topics during playback

True Omnichannel Analytics



“It’s crucial to be able to analyse all conversations across all channels in exactly the same way using a single application.”



Recordings

Direct integration from Genesys or from any Third Party Recorder



Email

Genesys Email or Third Party Email Application



Chat

Genesys Chat or Third Party Chat Platforms



Social Media

All Social Media Interactions types; from Tweets to Facebook posts



Asynchronous Messaging

Supports long lived customer conversations

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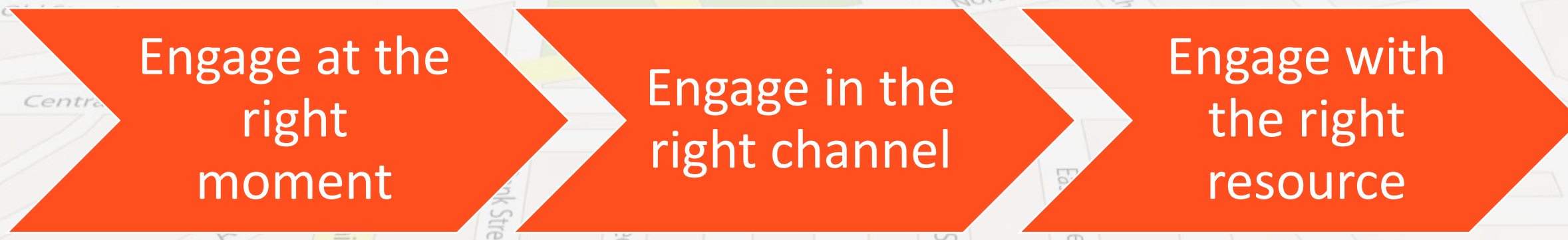
Journey Mapping



Journey Shaping



Shaping the customer journey



Engage at the
right
moment

Engage in the
right channel

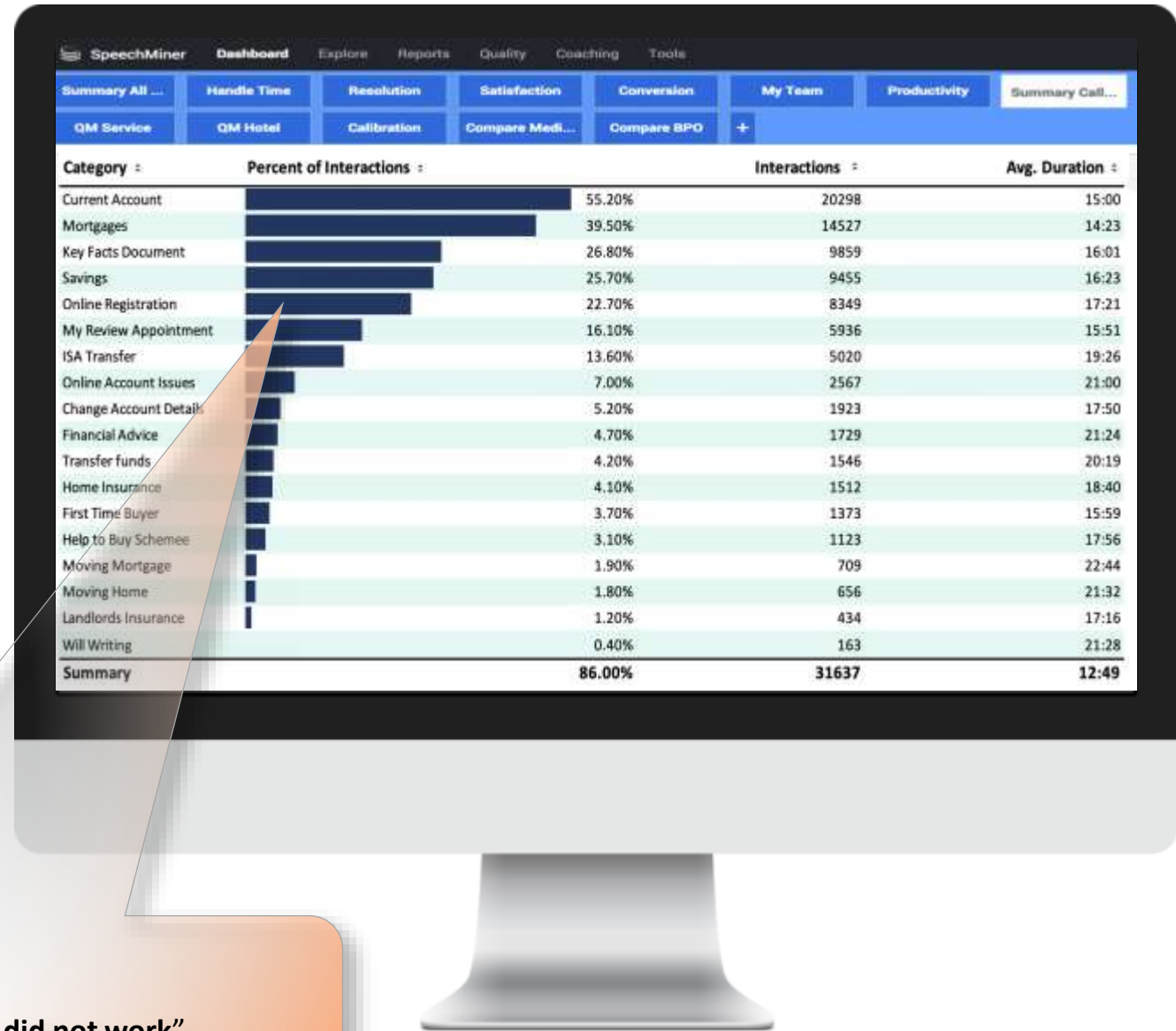
Engage with
the right
resource



Understanding Customer Intent



- Automatic categorisation of conversations by topics discussed
- Single or multiple topics for full insight/call reason/outcome
- Fast, accurate and consistent call classification from actual call content (independent of CRM, Call routing, IVR)
- In-depth breakdown of a call into call segments for precise classification
- Drill down capabilities right down to actual calls



"I have a question about my **secure pass code**"
"I **called yesterday** about my **mortgage over payment**"
"I **need assistance with updating my contact details**, the **online process did not work**"
"I am very happy with my **savings maturity offer**"

Dynamically Generate Case based on Intent count

Maksim Gill - EccentexDemo

https://apps.mypurecloud.com/directory/#/person/347cc434-b499-42f0-bcfd-704b990acc48

Activity Directory Documents Performance Reports Apps Admin


On Queue

Interactions Service Request

Service Reque... 3:34
DCM Queue 3:34

Scripts Vertical

Customer Detail



Mr. Pat Thompson
pat@email.com
+1 (949) 235-9009
+1 (310) 499-7060

Gold Member
3640 Sepulveda Blvd.
Los Angeles, CA 90230
USA

687
GOOD

- Paperless Billing
- Preferred SMS
- Automatic Payments
- Mobile Banking

Suggestions

- Eligible for a balance transfer >
- Add a family member to the account >
- (2) Pending Complaints >
- Waiting on Documents >

Create Case Knowledge Base

Type: Account Management

Sub-Type: Credit Line Increase

Requested Amount: \$5,000.00 Current Income: \$100,000.00

Account: 061315-00003

Submit

Customer Info Company **Cases (11)** Accounts (5) Notes Interaction History Customer Documents (2)

T	Case ID	Summary	Case Owner	P	State	Resolution
▶▶	CASE-2017-850	Excessive Fees Complaint	Nobody	✓	Closed	Complaint Resolved with Happines
▶▶	CASE-2017-849	Account Complaint	Nobody	✓	Closed	Complaint Resolved with Happines
🔊	CASE-2017-848	Loan Fees Complaint	Nobody	✗	New	
⚙️	CASE-2017-701	Jack McDonald - Qualified Lead - Tractor Loan	Michael Demo	⬆️	In Process	
▶▶	CASE-2017-604	Excessive Fees Complaint	Nobody	✓	In Process	
▶▶	CASE-2017-603	Account Complaint	Nobody	✓	Closed	Complaint Resolved with Happines
🚗	CASE-2017-546	Pat Thompson BMW Auto Loan	Dean Poole	✓	Closed	Approved
🚗	CASE-2017-545	Auto Loan for Wife	Serge Kazakov	✓	Closed	Denied
▶▶	CASE-2017-533	Excessive Fees Complaint	Michael Demo	✓		
▶▶	CASE-2017-532	Account Complaint	Michael Demo	✓		Closed
🔊	CASE-2017-530	My account was charged for overdraft	Nobody	✓	New	

Overview >

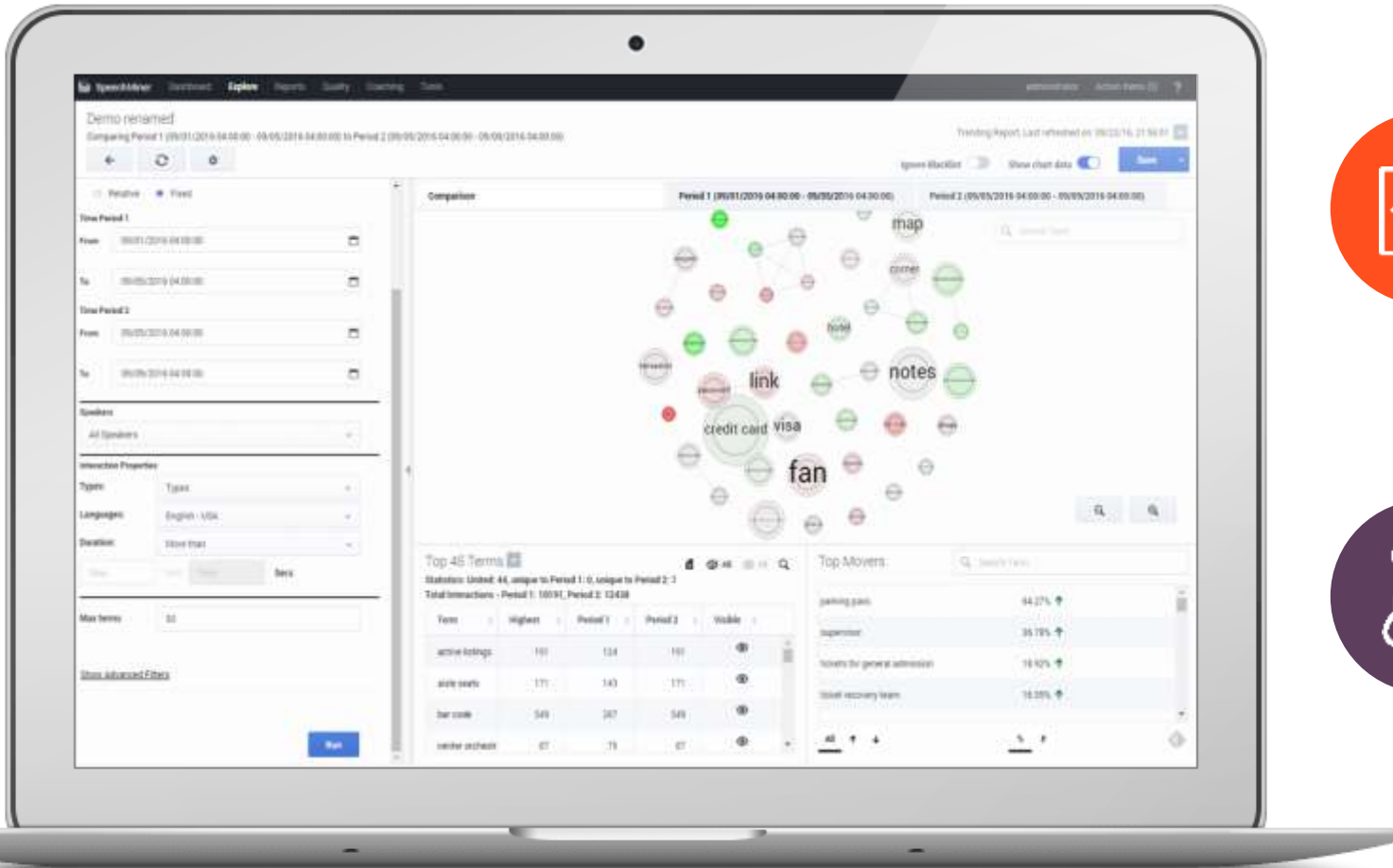
Account Balance	Credit Limit	Last Payment
\$8,433.29	\$20,000.00	\$256.89
10/21/2017	Payment	\$256.89
9/21/2017	Payment	\$256.89
8/21/2017	Payment	\$256.89

Current Products >

Accounts

061315-00003 MasterCard Credit Card

TRENDING ANALYSIS – UNCOVERING THE UNKNOWNNS



Identify Trends

Discover, identify and explore emerging business issues; pinpoint events that may require closer attention.



Phrase Discovery

Identify new phrases or topics for ongoing analysis of customer service delivery, employees performance, products, and processes.

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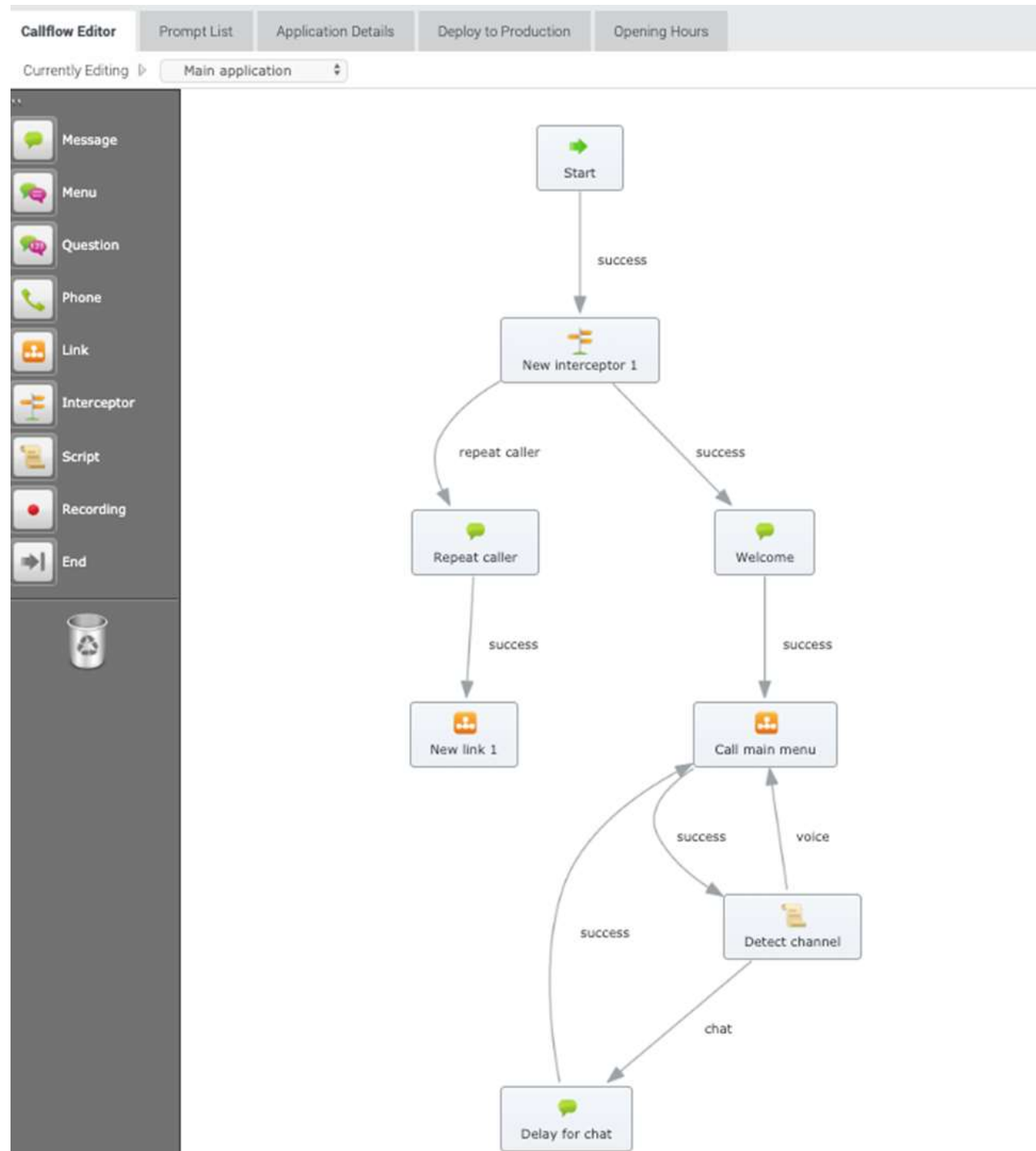


Orchestration

- Experience flow tool set
- Intuitive to the Business User

- Copy / Paste
- Look and Learn!
- Repeat / repeat / repeat

- When was the last time your experience flows were changed?



THANK YOU