



Call Routing for Large Organisations

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1. Purpose

A large organisation's inbound customer call centre represents both a significant cost and a significant business opportunity. This paper explains how open dialogue call routing delivers greater business benefits than human routing and touchtone menu systems, with a focus on the following business drivers:

- customer satisfaction,
- brand alignment,
- customer segmentation, and
- return on investment

2. Executive Summary

Open dialogue call routing is an intelligent speech-based routing solution that excels in knowing what callers want, identifying callers and rapidly & consistently applying business rules. These are the cornerstones of delivering customer satisfaction, customer segmentation and contact centre efficiencies. Additionally open dialogue call routing allows the large organisation to converse with each caller in a manner that reinforces - rather than detracts from - their brand. No other call routing methodology is as compelling in delivering benefits against these four business drivers.

Not all speech-based routing deployments can be considered intelligent – the vast majority are merely speech-enabled touchtone menus or open dialogue call routers that collect only one piece of information from a caller's response, greatly limiting business benefits. The large organisation is well advised to seek a speech solutions provider who is highly experienced in delivering open dialogue call routing and who leads with a consulting approach to maximise business benefits.



3. Technology Definitions

- **Open Dialogue Call Routing**
An intelligent speech-based solution allowing an 'open dialogue' between the system and caller. The system asks the caller a question that invites the caller to speak their chosen task in their own words, interprets the caller's phrase and routes them to the most appropriate queue or self-service option.
- **Complex Touchtone Menu Routing**
A multi-level touchtone system allowing callers to self-select the queue or self-service option that is closest to their intended task.
- **Simple Touchtone Menu Routing**
A one-level touchtone system allowing callers to self-select the broad queue or self-service category that is closest to their intended task.
- **Human Routing**
Use of human operators to greet callers, enquire as to their reason for calling, identify the queue most appropriate for the caller and initiate the transfer.

4. Customer Satisfaction

The ability to deliver customer satisfaction starts with listening to customers. The touchtone menus employed by the majority of large organisations fail to do this, instead requiring callers to navigate through lists of organisational departments and products. Open dialogue call routing allows the organisation to ask and listen, with callers speaking their request in their own words. As it does so, it is able to collect and act on significantly more information than a human router is capable of. Here is a typical example of a caller request:

"I want to extend my home loan"

This request contains three pieces of information, that the caller:

- is an existing customer,
- has a home loan with the organisation, and
- is seeking additional funds.

While this information seems obvious, human routers and touchtone menus cannot collect and forward at this level for thousands of unique requests – the information is typically lost, dumbed down to the choice of queue. As humans and touchtone menus can support only a limited number of queues, the information provided to the end agent can be as generic as 'the call came from the home loan queue' or worse, 'the call came through the existing customer queue'. With the high misroute levels for human routing and touchtone menu routing – a major Australian bank recently stated that their touchtone misroute rate was 30% - even this information is unreliable, forcing agents to greet callers with:



“Welcome to Large Organisation, how can I help you today?”

This leads to loss of call control and in turn significantly increased talk time as the agent asks the customer what they need, identifies the caller and determines their approval limits. By comparison, open dialogue call routing can collect, retain and reuse all of the information and present it to the agent through screen pop with full context about the enquiry. Combined with speech-based identification and verification – using voice biometrics, knowledge-based questions or account/PIN - the call can be routed to the best agent who can take control of the call with:

“Hello Mr Jones, you are pre-approved for an additional \$100,000 – how much do you need?”

If customer satisfaction starts with understanding each caller’s needs, it ends with the organisation filling those needs in a manner that meets or exceeds their expectations. These expectations start at a baseline of task completion – to make increase the size of their home loan in this example – but will incorporate promises made by the organisation’s brand and products. Unless the organisation has a ‘cheap and cheerful’ strategy, these expectations will include:

- ease of access - usability,
- fast service - short queues,
- transfer to the appropriate person - no misroutes,
- high availability – as high as 24/7, and
- an experience consistent the brand - this is why they chose to deal with the organisation in the first instance.

Open dialogue call routing excels in all of these areas.

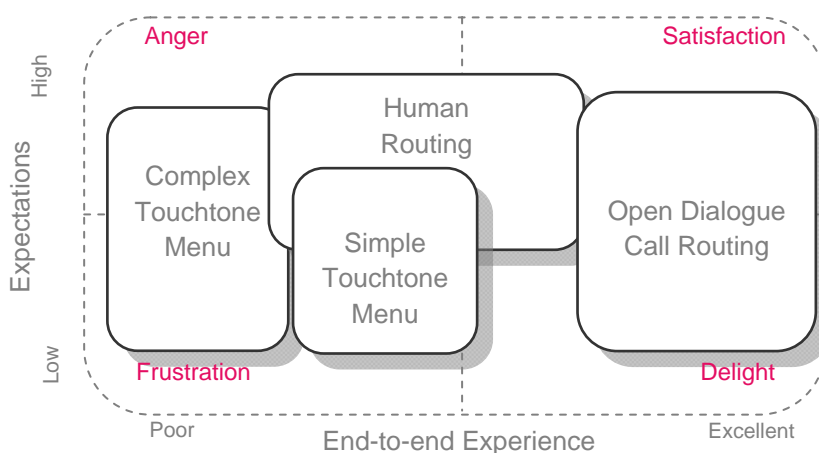


Figure 1: Customer Satisfaction Quadrant



5. Brand Alignment

Large organisations spend millions each and every year developing unique brand positions through multiple touchpoints – television, radio, print, outdoor advertising, point of sale - only to abandon their brand at their inbound call centre through a bland corporate touchtone menu or undifferentiated human routing. In doing so, the large organisation forces the caller to ask a question – ‘Which of my experiences of Large Organisation – their engaging advertising or their bland touchtone menu – is the real face of Large Organisation?’ Open dialogue call routing allows offers full brand alignment, removing the need for callers to ask this question.

Where a distinctive voice or public figure is used in branding, open dialogue call routing can be used to allow the caller to have a conversation with that person – to engage with the public persona directly. Imagine speaking with Billy Connolly to route your call with ING, for instance. Otherwise a speech persona can be developed, tested and deployed to closely reflect the organisation’s brand attributes, whether the brand is fun as Virgin or as sober as an investment bank. In doing so every caller to the organisation has a consistently branded experience.

Of course, complex or simple DTMF also offer possibilities for brand leverage, although some of the magic is lost by telling callers ‘For service A, press 1. For service B, press 2 ...’. Human routing is a lowly paid role and a mundane task – workers with skills required to foster a brand position will likely have the initiative to work elsewhere.

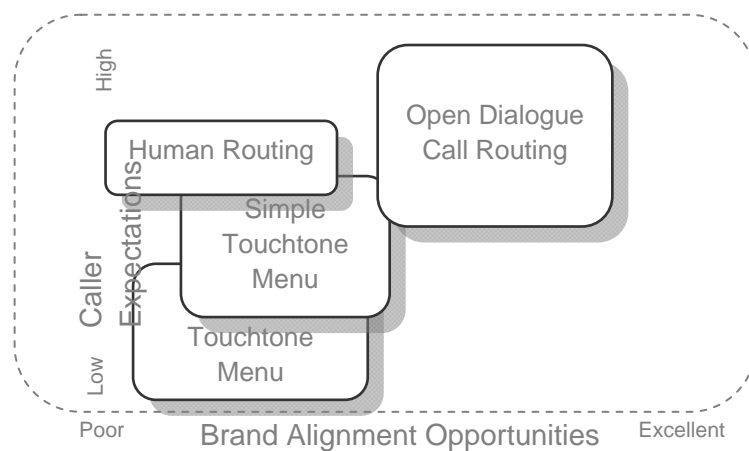


Figure 2: Brand Alignment and the Customer Experience



6. Customer Segmentation

To segment customers effectively, a large organisation must:

1. know what each caller wants,
2. know who each caller is, and
3. be able to utilise this information to rapidly and consistently apply business rules.

Of the four routing solutions, only open dialogue call routing is effective in all three domains. Touchtone menus can identify callers in limited circumstances (such as numeric account identified and PIN) and it can apply business rules as efficiently as open dialogue call routing, but critically it cannot know what callers want. Human routers can find out what callers want and they can identify callers, but they cannot rapidly apply hundreds of business rules nor pass on collected information in a timely fashion. The best that can be achieved with human routing is to identify the quick wins for customer segmentation and train agents to apply those rules as consistently as humanly possible.

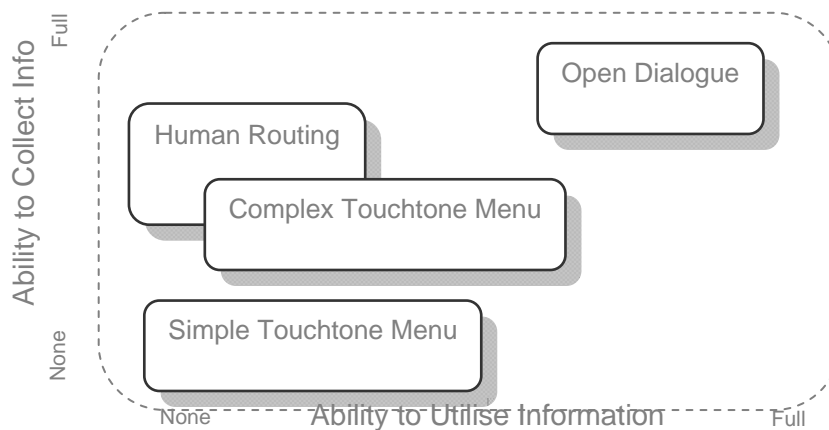


Figure 3: Customer Segmentation Capabilities

7. Return on Investment

Open dialogue call routing enables an organisation to save and make money. It saves money by:

1. removing the need for employees to route calls, freeing them up for a higher purpose,
2. greatly reducing misrouted calls in the organisation,
3. automating routine transactions (and those prone to identity theft by staff), and
4. offering 24/7 service and being scalable to any size of organisation.

By knowing what callers want, open dialogue call routing makes money by:

1. making existing revenue opportunities more profitable,
2. enabling new low-margin opportunities that are possible only via automation,
3. providing compelling cross-sell opportunities to complex business rules, considering the caller's request & account value and matching them with organisational products and services, and
4. identifying and prioritising high value calls and transferring them to the most capable staff.

Human routing does not save money – it's the high cost that open dialogue call routers and touchtone menus seek to avoid and is still prone to misrouting. It's also not scalable – each agent will handle a certain number of calls per day - increased throughput is possible only through reduced talk time, further compromising the caller experience. As for making money, humans are able to identify fewer opportunities than open dialogue call routing – they cannot apply complex business rules reliably, consistently and quickly. Nor can they pass on anything but the most basic information to the customer service agent or self-service application, forcing callers to repeat the information they have already given.

Touchtone menu routing saves money at the front end but costs money at the back end with high levels of misrouting. It also cannot identify key opportunities such as win-back situations and will transfer callers to any agent rather than trained win-back teams. As for making money, touchtone menu routing provides few opportunities as it does not know what callers want – it only knows the caller's best guess of the organisation model provided by the touchtone system designer.

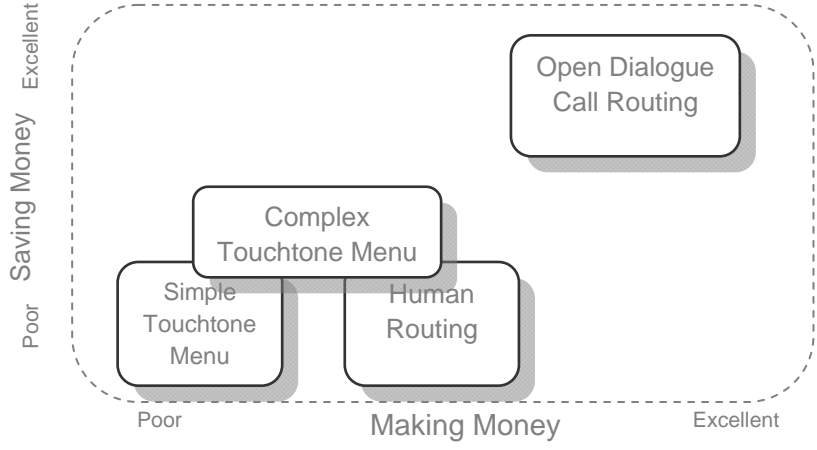


Figure 4: Ability to Save and Make Money (End-to-end organisational Processes)



8. Intelligent Open Dialogue Call Routing

This paper discusses the intelligent deployment of ‘open dialogue call routing’ technology and its benefits. Unfortunately the majority of deployed speech-based routing systems are not intelligent, being either:

speech-enabled touchtone menus (e.g. “Please say [service A], [service B] or [service C]”) which shares the pitfalls of complex touchtone menu routing, or

open dialogue systems which invite complex caller responses but collect only one piece of information from each response. This greatly limits the accuracy of the router, frustrates the caller by forcing them to repeat themselves and restricts the organisation’s ability to save and make money.

The large organisation is well advised to seek a speech solutions provider who is highly experienced in delivering intelligent open dialogue call routing & other speech solutions and who leads with a consulting approach to maximise business benefits.