

Eight contact center
optimization use
cases powered by
CUSTOMER JOURNEYS



Introduction

When your customers need support, they expect to have a great experience no matter which channel they use. The Head of Call Centers at Barmer GEK, a leading German health insurer, said it best: “Our customers increasingly expect to be able to interact with our agents through multiple communication channels — whenever and wherever — and to switch seamlessly between them.”

What’s more, organizations worldwide now expect their contact centers to simultaneously increase customer and employee satisfaction, improve performance, and reduce cost to serve. This expanded role requires contact center leaders to transform their service centers into customer experience hubs.

To achieve this, every member of the contact center — from agents to channel managers to call center leaders — must understand each customer’s unique omnichannel experience to help them reach their goals efficiently. This requires a solution that provides insight into customer behavior within and beyond the contact center, so contact center teams can deliver the seamless, empathetic experiences their customers demand.

A journey-centric contact center optimization solution lets you measure, monitor and optimize every contact center experience. This way, you can deliver frictionless and connected omnichannel experiences and achieve contact center goals like reducing repeat calls and average handle times, while increasing first contact resolution and digital containment rates.

In this ebook, we’ll explore eight use cases across the banking, telecommunications and health insurance industries that illustrate how service leaders can use the Pointillist® Customer Journey Management Platform to meet business goals while improving customer experience.



A new way to optimize every experience

A modern contact center is powered by a complex web of systems that enable and manage calls, chats, IVR, analytics, customer relationship management and more. The amount of customer data created and collected within your contact center — as well as across your enterprise — is typically isolated in channel-specific applications so your agents and analysts can't fully access or leverage it.

To deliver seamless and connected omnichannel experiences, you must understand exactly what your customers do across all your contact center channels, as well as what leads them to make contact and what they do after an interaction.

Contact center professionals at leading enterprises are adopting solutions that improve their ability to visualize and measure cross-channel customer journeys; identify drivers of poor experiences and performance; and optimize experiences by bridging the gaps between chat, voice and IVR.

Contact center leaders can use Pointillist to:

- Boost contact center channel performance
- Increase self-service
- Improve experiences beyond the contact center
- Enhance escalation management

Each of these four areas can greatly affect customer satisfaction, cost to serve and other business outcomes.

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- Increase self-service
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1. BOOST CONTACT CENTER CHANNEL PERFORMANCE

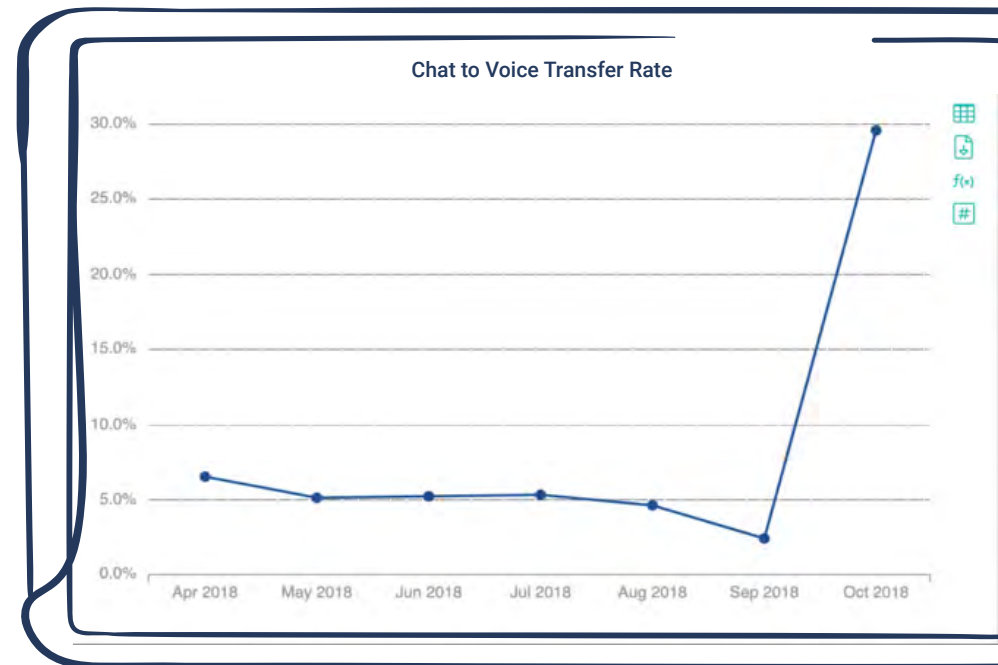
Decrease chatbot abandonment to reduce cost and improve satisfaction

A leading mobile provider uses Pointillist to improve self-service containment rates

The Director of Chat Operations at a mobile provider sees an increase in chatbot abandonment rates. She uses Pointillist to analyze interactions within the chatbot that lead to abandonment, as well as those that are handed off to a live chat agent.

She finds that customers who want to add a mobile line are dropping out of the chatbot most frequently. It seems they interact with the chatbot but enter an endless loop because the chatbot can't hand them off to a chat agent to complete their request.

The director works with the chatbot development team to address this use case. Once the flow is corrected and enhanced, chatbot containment improves by approximately 5%, which translates to almost \$700,000 in cost savings. And customer satisfaction (CSAT) begins to rise for customers adding a new mobile line.



Reduce voice agent transfers to improve effort scores

A mortgage lender uses Pointillist to reduce agent transfers and improve customer effort

The Call Center Operations Manager at a national mortgage lender notices a spike in voice agent-to-agent transfers. She also sees the Customer Effort Score (CES), which the lender measures on a seven-point scale, declining from 6.5 to approximately 4.6.

Using Pointillist, the operations manager finds that the highest volume of agent transfers result from consumers calling in after

their mortgage application has been denied. Most queries are resolved once consumers reach the second agent.

For these calls, customer service reps transfer customers to their assigned underwriting agent, who can provide the reason for denial and steps consumers can take to re-apply. With this information, the Call Center Operations Manager works with her technical team to improve call routing so consumers who received a denial in the past 48 hours are routed directly to their assigned underwriting agent.

As a result, the agent transfer rate falls to normal levels and CES steadily climbs to its previous score.

32.6%

Agent Transfer Rate



4.6

Customer Effort



2. INCREASE SELF-SERVICE

Improve IVR containment and self-service rates

A health insurance provider uses Pointillist to understand fallout and increase IVR containment

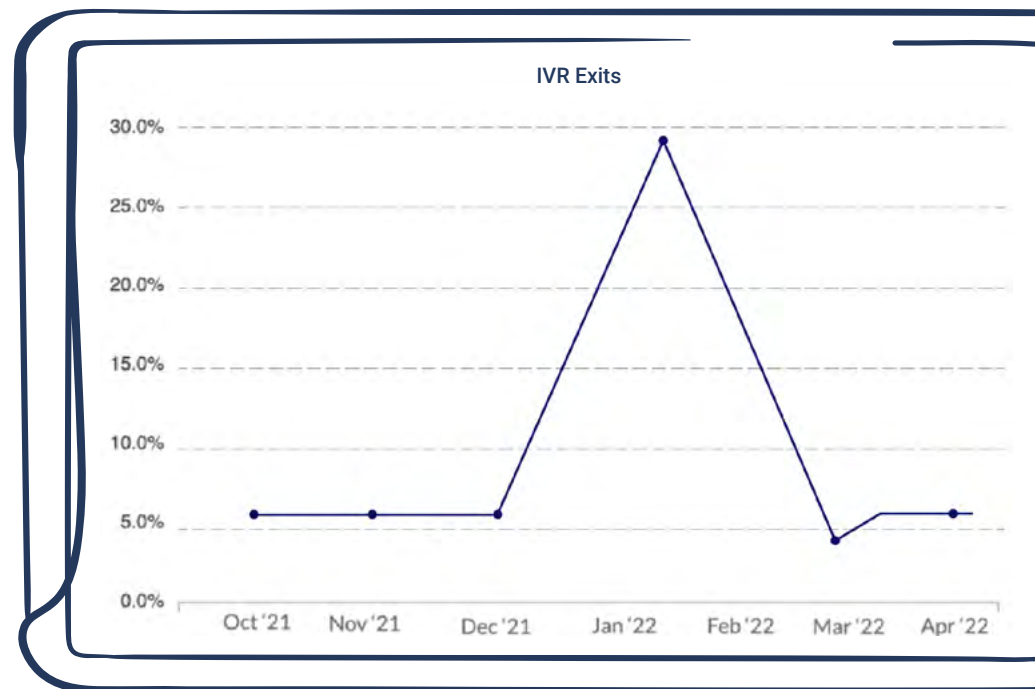
The Plan Administrator and Contact Center Director at a regional health insurer set a goal to increase self-service rates to reduce both the level of effort for plan members and inbound traffic to the contact center.

She uses Pointillist to determine where customers are most likely to exit the IVR to ask for assistance from a live agent. Most of the calls that result in exits to a live agent come from members confirming if their new doctors are covered under their PPO plan. By analyzing the last 12 months of data, she calculates these IVR exits accounted for 11% of inbound call traffic to the contact center at a cost of \$590,000.

The plan administrator works with the IVR design team to build voicebots that look up a doctor's name and location to determine if they're covered under the member's PPO plan or if it would result in increased out-of-pocket expenses. As part of this bot design, members are presented with other specialists

in the area who offer the same service if their chosen physician isn't covered under the PPO plan.

As a result of this change, IVR containment increases and contact center costs begin to decline, while member effort is reduced and CSAT ratings increase.



Decrease IVR handle times and transfer rates

A leading wireless provider uses customer journeys to uncover the root cause of a significant increase in agent transfers and AHT

The Call Center Analytics Manager at an Internet Service Provider (ISP) sees AHT and the agent-to-agent transfer rate increasing.

He uses Pointillist to analyze all calls that result in multiple agent transfers, as well as handle times. In minutes, he finds that the largest volume of calls requiring transfers stems from customers requiring technical support.

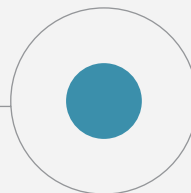
By analyzing IVR interactions, call drivers and recordings, he finds that 30% of customers encounter an issue with their router. Of those 30%, almost half visit the router reboot forum page,

then reboot their router – but find the issue isn't resolved.

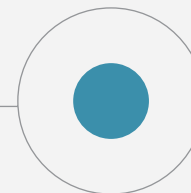
That's when customers place a call. They reach a customer service representative who walks them through the reboot process, not knowing they've already completed this step in their journey. They are then transferred to a technical support agent to resolve the issue, increasing call minutes.

With this insight, the call center manager works with the IVR Director to route customers who have initiated a device reboot in the past 24 hours directly to technical support.

This initiative decreases AHT by 3% and agent transfers by 5%. The call center manager also sees an increase in the Net Promoter Score (NPS) for repair journeys.



Agent Start



Agent Transfer

3. IMPROVE EXPERIENCES BEYOND THE CONTACT CENTER

Improve call center metrics and lower cost to serve

A credit card issuer uses Pointillist to identify the cause of a dramatic increase in repeat calls and cost to serve

The Senior Supervisor of Customer Service at a large credit card company sees a dramatic rise in repeat calls over the month of October, which is increasing costs by almost 230%.

She uses Pointillist to determine what's driving the largest volume of repeat calls. She discovers that cardholders attempting to redeem credit card rewards are driving over 50% of repeat calls.

Using Pointillist, the customer service supervisor learns what consumers are doing before they place a call.

It seems cardholders first try to redeem their rewards via the mobile app, then place a phone call. Upon further analysis, she finds that 85% of these callers use the iOS version of the mobile app.

The customer service supervisor connects with the mobile team, which recently deployed an update on both iOS and Android. It seems the recent update has a bug in the iOS version, so the team worked to resolve the issue.

Once the bug is fixed, the repeat call rate declines as quickly as it increased, saving almost \$900,000 in costs.

FCR	Call volume	Repeats Calls	Cost to Serve
72.5% ↑ +15.2% <small>Prior: 62.5%</small>	55.7% ↑ +1.2% <small>Prior: 55%</small>	40.1 ↑ +4.8% <small>Prior: 38.3</small>	\$4.4M ↑ +10.8% <small>Prior: \$4M</small>
82.5% ↓ -2.7% <small>Prior: 84.8%</small>	50.1% ▬ +0.2% <small>Prior: 50%</small>	42.2 ▬ +0.2% <small>Prior: 42.1</small>	\$3.7M ▬ +0.2% <small>Prior: \$3.7M</small>
75.3% ↓ -1.1% <small>Prior: 76.2%</small>	66.3% ↓ -14% <small>Prior: 77%</small>	35.8 ▬ -0.7% <small>Prior: 36</small>	\$14.8M ↑ +4.4% <small>Prior: \$14.2M</small>
41.7% ↑ +3.3%	48.8% ▬ +0.3%	38.8 ↑ +8.9%	\$1.3M ▬ +0.1%

Decrease repeat calls and member effort

A health payor uses Pointillist to reduce repeat call rates and improve effort scores

The Director of Contact Center and Patient Access at a large health insurance company wants to decrease call volume during open enrollment and improve effort score for members enrolling in Medicare Advantage.

He uses Pointillist to analyze enrollment journeys and discovers that a majority of calls received a registration disposition code. However, Pointillist reveals members actually called to confirm their memberships and to inquire about continuity of care.

He works with the Contact Center Operations Manager to update disposition codes to reflect the real reasons members contact the call center during enrollment.

The director also shares this information with the member services team, which uses Pointillist to proactively engage with new members. Once enrollment records are loaded, email messages and SMS are sent using data from the membership system. These messages confirm their enrollment and provide the effective coverage date.

During their next enrollment period, member effort scores improve and there's a significant reduction in the repeat call rate.



4. ENHANCE ESCALATION MANAGEMENT

Identify the root cause of costly escalations

A retail bank uses Pointillist to investigate and minimize costly escalations

A case manager at a large retail bank must identify what led to a particular case escalation and determine if the underlying problem affects other clients.

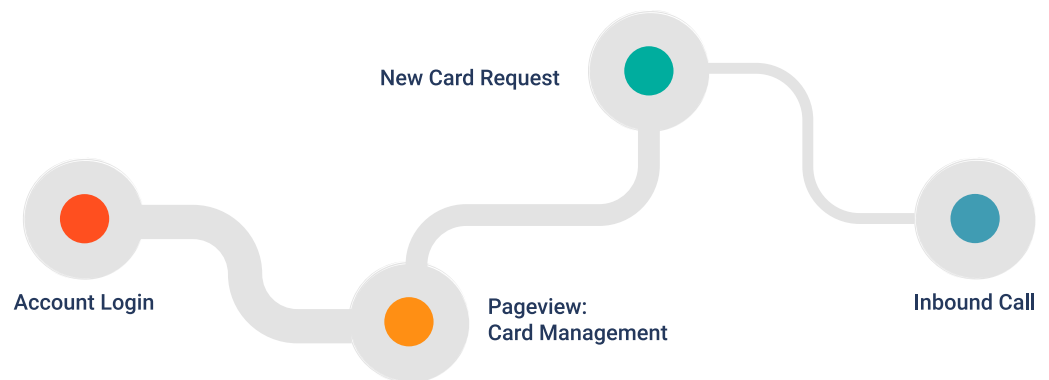
He uses Pointillist to uncover the steps this customer took before placing multiple calls that escalated to a supervisor. Before the client's first call, she froze her debit card then initiated a dispute via the mobile app. She attempted to secure a replacement card via the app as well but couldn't complete the request. She placed a call and spoke with an agent, who completed her request.

Ten days later, she called again. Two days later, she called a third time, which then escalated to a supervisor. Using Pointillist, the case manager analyzes agent notes, call reasons and recordings in addition to the customer's cross-channel behavior. It seems her replacement card didn't arrive in the three to five days she was promised. When she called to inquire about her new card a second time, she was already frustrated and required further assistance from a customer service manager.

With this information, the case manager analyzes experiences of customers who request a card replacement. The manager determines that, of the 200,000 customers who request a new debit or credit card each month, almost 20% call at least once to inquire about the status of their replacement cards. These calls increase costs by over \$250,000.

The case manager shares this information with the consumer banking team. They implement a tracking system that automatically notifies clients via email or SMS when their new cards ship, are out for delivery and are delivered.

Case escalations related to replacement card requests decrease significantly, which has a positive impact on call volume, cost to serve and NPS.



Optimize support and mitigate costly escalations

A leading internet service provider improves support journeys to reduce escalations

A case manager at a national ISP must uncover why a long-time customer contacted the CEO with a complaint. Her CEO wants to understand how the customer's problem persisted for so long.

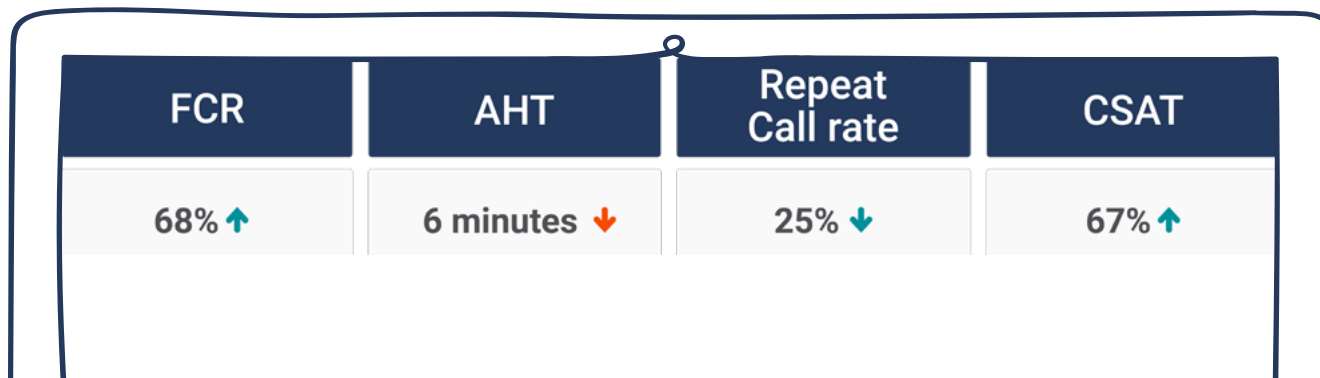
Using Pointillist, the case manager analyzes the customer's interactions within the contact center. She sees he called the contact center three times to troubleshoot connectivity issues. Before that, he attempted to use the website FAQs to solve the problem.

Based on this information, as well as call logs and agent notes, the case manager realizes the customer's modem has out-of-date software. She discovers the agents he spoke with weren't equipped with the software update notice, so they couldn't fix the issue. Also, she sees the FAQ page doesn't direct customers to download the modem app.

Lastly, the case manager uses Pointillist to quantify how many other customers might experience this issue. She learns that 14% of customers have the same modem but haven't installed the app.

The case manager shares this information with the call center manager, who communicates the issue and its solution to agents. She also shares this information with the product and web teams, who update the FAQ page to help customers diagnose the issue and update the modem software. Finally, she shares this information with the outbound campaign manager to target the 14% of customers with the older software to generate both a proactive email and an SMS alert.

The number of repeat calls because of this issue decreases significantly as mobile app downloads, FCR and self-service rates increase.



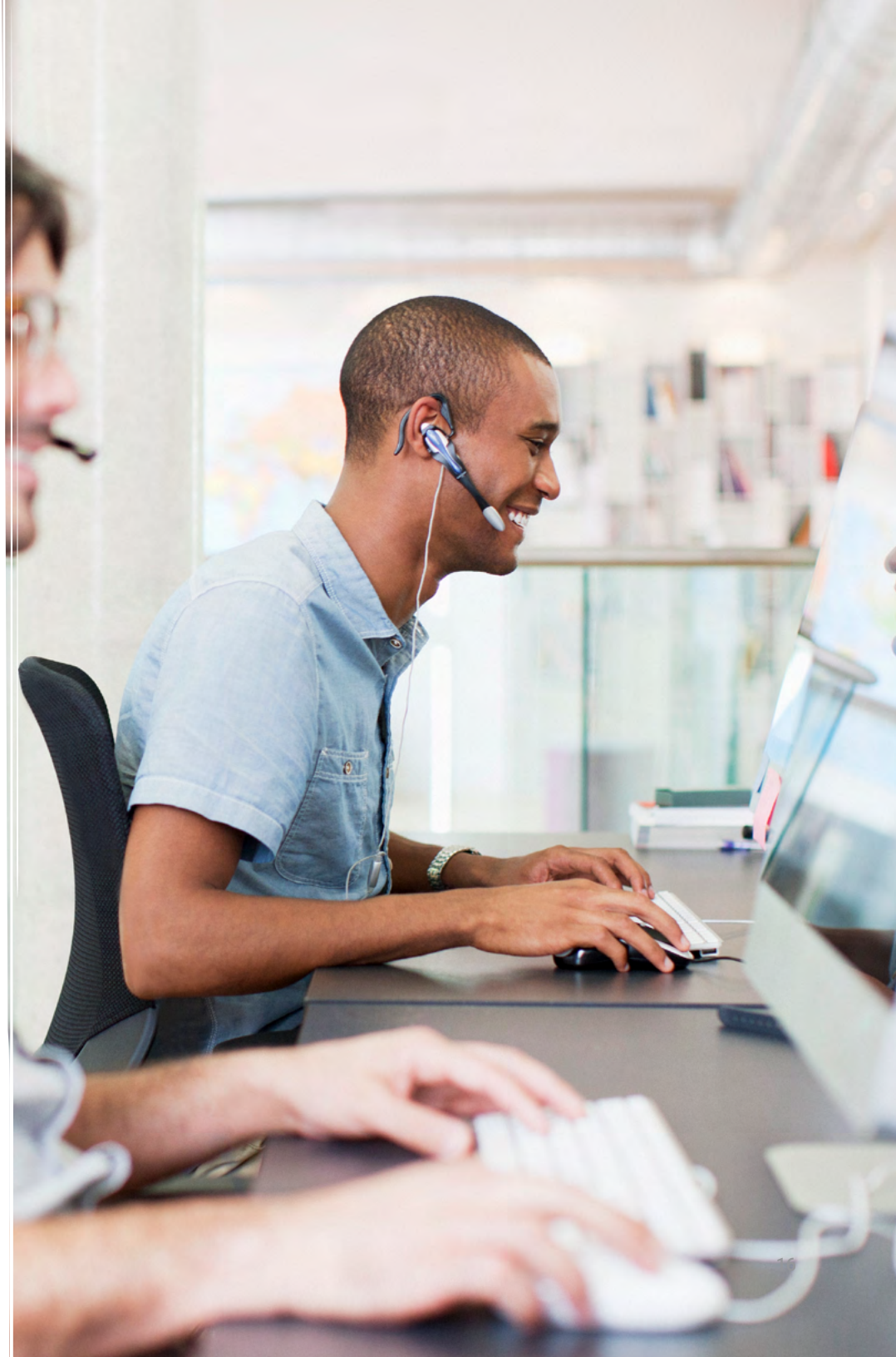
FCR	AHT	Repeat Call rate	CSAT
68% ↑	6 minutes ↓	25% ↓	67% ↑

Summary

Contact center leaders are under increasing pressure to achieve business objectives like lowering costs and improving customer satisfaction. It's time to realize that these goals aren't mutually exclusive.

Start with the actual goals your customers pursue. By monitoring the paths they take both within and beyond the contact center, you can better identify drivers of poor and costly experiences.

Using a journey-based approach to contact center optimization – rather than implementing improvements by channel – enables you to quantify the impact of contact center experiences on business goals and outcomes. More importantly, it allows you to deliver consistent, high-quality experiences across all service channels, which can improve performance, reduce costs and increase customer and employee satisfaction.





Contact center leaders are under pressure to increase customer satisfaction, improve performance and lower costs. In a world where customers expect a personalized experience on any channel they choose, contact center teams struggle to deliver experiences that anticipate each customer's needs by recognizing their preferences, prior experiences and current goals.

That's why customer-centric organizations rely on the Pointillist Contact Center Optimization Solution to improve every contact center experience, increase customer and employee satisfaction, boost contact center performance and reduce cost to serve.

Contact center operations depend on Pointillist to:

- Measure & monitor omnichannel experiences both within and beyond the contact center
- Identify the drivers of poor contact center experiences and performance issues
- Deliver frictionless and connected omnichannel contact center experiences by bridging the gaps between chat, voice and IVR

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