THE MULTICHANNEL CONTACT CENTER BECOMES "OMNICHANNEL"

Challenges and enablers to achieving a seamless, integrated environment for customer experience.

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Contact centers have pursued "multichannel" for over 10 years with marginal success. While they have added email and chat, these channels often exist in silos from a technology, process and organizational perspective. Now "omnichannel" has come onto the scene to knock multichannel down a notch and replace it. But what is different? And will centers succeed this time around?

As vendors and practitioners jump on a new bandwagon for serving customers via their channels of choice, we need real progress on channel integration, not just more market hype. This article will outline the challenges and enablers to achieving success in this environment *whatever you choose to call it.*

Clear Lingo or Tower of Babel

Whether we choose to call it "multichannel" or "omnichannel," there is still potential for different perspectives on what it means. Clearly the term is talking about customer interactions via a variety of communications media (e.g., voice call, email, web chat). But it also opens up a series of questions: Does it include the web? Mobile? Social? Are we talking about self-service as well as assisted service? Does it include face-to-face channels (e.g., stores, branches) and other channels specific to various industries, such as kiosks or ATMs?

There is yet another term thrown into the mix: "cross-channel." Most often, it seems to apply to reporting and analysis as customers move from one channel to another. It, too, has been pursued for years, with limited success. So how do the goals of cross-channel fold into an omnichannel world?

The channel discussion probably goes beyond the boundaries of the "contact center" and what it controls. Further complicating things, not everyone (or even a majority) is using the "omnichannel" terminology yet. Vendors and analysts appear to be ahead of the practitioners at this point. My inquiry as part of a keynote panel at ICMI's Contact Center Demo conference last November triggered less than 5% of the audience to raise their hands that "omnichannel" is the term they hear or use. I'm willing to bet a good number of those who did raise their hands are vendors. But the new term has the hype and momentum in the industry, and is poised to act as the catalyst for change to get this channel thing right.

Figure 1 shows how the terms are being positioned today. Recognize that the current definition of omnichannel is what most people intended with multichannel all along, with a goal of a seamless customer experience. Centers struggled to get there so, in practice, multichannel ended up being more siloed. Changing the label won't change that reality unless companies do things differently this time around.

A Tall Order

Customer expectations, the desire to meet them with efficient, effective service, and ideally a resulting boost in loyalty, are the drivers for adding channels. Those customer expectations are reasonable but present tremendous challenges from a technology and operations perspective.

FIGURE 1

THE EVOLVING
LANGUAGE
OF CUSTOMER
CONTACT

- More than one channel/media
- Consistent customer view and experience

Multi-channel MC

- Move from one to the next
- And track it/ report on it

Cross-channel XC

- Integration, connection across channels
- Move "seamlessly"

Omni-channel OC

Centers have been trying to go here...

And some tried this too...

Now this is the buzzword... but is it really different?
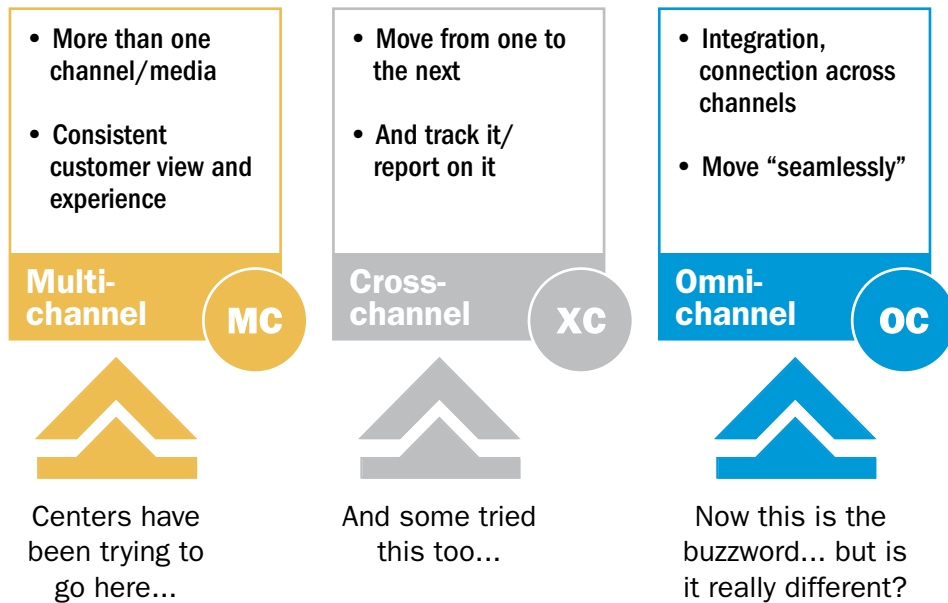
FIGURE 2

THE CHALLENGES
AND PRESSING
QUESTIONS OF AN
OMNICHANNEL
WORLD

Organizational Silos
- Who owns what channels?
- Where do they all come together? (CCO? Cxo?)
- How do they coordinate?

End-to-End Processes
- What impacts the customer upstream/downstream?
- Where are the handoffs on a single interaction?
- What about subsequent or disconnected interactions?

Enabling Technology
- How do you integrate and ensure consistent, real-time data/information availability for "seamless" channel transitions?
- Have you got CRM, KM, MMR, Analytics, etc.?

Governance
- Who needs to be involved?
- How do you get them all engaged? (see above!)
- How do you maintain focus and continuously improve?

➡ Knowing the customer is perhaps one of the biggest drivers of omnichannel, yet it has been the message surrounding CRM for over 20 years.

Everything old is new again.

Here's what your customers probably want:

- Let them use *diverse channels*, connect with you *any time*, be mobile, proactive and social
- Know who they are, their preferences, their relationship and history with you
- Communicate with them using *one "voice,"* as one company
- Make navigating your services and conducting transactions easy
- Provide effective, efficient and *consistent* user interfaces
- Establish (and achieve) *performance* levels in line with each media
- Make "channel" transitions *seamless*

What all of that boils down to is integration and connections across channels, which can easily be hindered by your internal organizational structure, siloed or poorly defined processes, and/or inadequate technology.

Figure 2 shows the typical challenges we see and some of the pressing questions these challenges create. The answers require significant technology investment, not to mention organizational coordination. Shifting the conversation from multichannel to omnichannel is only a first step.

Facing the Challenges

From my "in the trenches" view working on projects with clients, I see the failures stemming from four primary areas:

1. CHANNEL OWNERSHIP AND ORGANIZATIONAL COMMITMENT

Multiple channel owners don't necessarily have the same goals, and probably don't report to the same person (until you get to the top). The result is lack of strategy and alignment. I'll talk more about governance, but this factor impacts all project phases. It inhibits willingness to invest in technology and allocate resources. Few companies put all channels in one person's hands, and we have to accept that and find ways to work around it, rather than declare mass organizational change as a prerequisite (which is a non-starter in most companies).

2. TECHNOLOGY INTEGRATION

This part is hard and the risk with the renewed industry energy around a new term is that it gets trivialized. Centers have lots of systems, with many options of where to manage and route different channels. You probably route voice in the "ACD," but you may route other media in CRM or a multimedia routing tool or another standalone routing tool. Maybe you don't have CRM, or you have multiple CRM (one for each department!), but, either way, it's likely that you don't have one common data source for customer information, or one knowledge base that is the source of truth for processes and policies throughout the company. The lack of multichannel reporting and analytics (and an associated data warehouse with connected data) is yet another pain point for most companies. All of these technology integration issues are compounded by the first challenge, by IT having too many things on its plate for too few resources, and by the difficulty of tackling the big stuff.
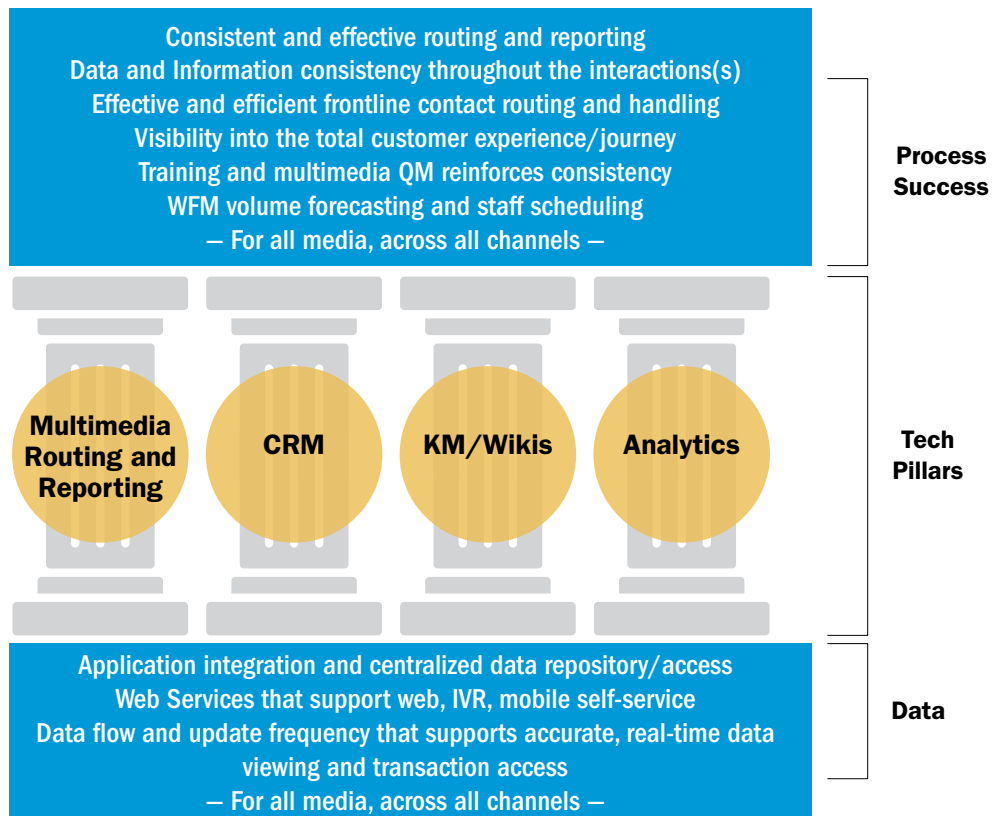
3. END-TO-END PROCESSES

It's much less complicated (although not easy) to worry about what happens within the boundaries of a single department or channel. With omnichannel, people have to look at what impacts the customer upstream and downstream, where the handoffs or channel crossings are on a single interaction, and what happens on subsequent or disconnected interactions. Process optimization screams for cross-departmental collaboration. It also points to the need for common, integrated technology.

FIGURE 3

THE TECHNOLOGY PILLARS ARE ESSENTIAL TO PROCESS SUCCESS

Consistent and effective routing and reporting
Data and Information consistency throughout the interactions(s)
Effective and efficient frontline contact routing and handling
Visibility into the total customer experience/journey
Training and multimedia QM reinforces consistency
WFM volume forecasting and staff scheduling
— For all media, across all channels —

Process Success

Multimedia Routing and Reporting

CRM

KM/Wikis

Analytics

Tech Pillars

Application integration and centralized data repository/access
Web Services that support web, IVR, mobile self-service
Data flow and update frequency that supports accurate, real-time data viewing and transaction access
— For all media, across all channels —

Data

4. CONTACT CENTER DISTRACTIONS

At a more tactical level, contact center leaders have so many problems to solve, many of which are more urgent and less intimidating. So they might realize they need to add channels like chat, but it's all they can do to pilot it and then are often set up for failure with lack of marketing, not enough staffing, turning it on only when convenient, etc. They want to improve email routing and reporting, but want or need to get their act together as a single channel before they tackle the bigger task of omnichannel.

Technology as the Great Enabler

While technology alone certainly can't solve all these challenges, it may be the thing that helps create the breakthroughs from the (redefined) multichannel to omnichannel. The starting place is the core technologies that help integrate channels for routing, reporting and access to customer information. You need good identification methods on each channel, and good ways to tie identifiers to what you know about your customers. There has to be some connection and consistency for routing, skills and business rules for contact delivery and handling, and good information on performance for each channel. Information about the customer gained through telephony or other channels must be tied into other information you have about them, in a "go-to" place where the data resides and each of the customer-facing interfaces or applications update (in real-time) and access that same data.

We define a few "foundational tools" that create a common customer view and experience and enable the seamless movement across channels, and the insights into how it's all working. It starts with a single multimedia routing engine or various routing tools that talk to each other, whether premise or cloud-based, with routing intelligence and tracking that ensures all contacts (all media) and agent activity can be viewed and managed in real-time and assessed historically. Customer relationship management (CRM) helps you to know the customer, track their interactions, and ensure that the information is available across all channels. Knowing the customer is perhaps one of the biggest drivers of omnichannel, yet it has been the message surrounding CRM for over 20 years. Everything old is new again. Knowledge management (KM) and/or wikis provide consistent information to support resolution in any media, and can support self-service or assisted service. Reporting and analytics tools measure and report key performance indicators (KPIs), as well as show overall customer experience as they use different channels.

Don't forget that the various forms of self-service (IVR, web, mobile) can create that first impression and set the stage for effective assisted service. Consistent terminology and user interfaces and appropriate authentication set the stage for a successful customer experience. Using the information gathered (often through the self-service tool) in the next step, regardless of channel, is so fundamental yet so often overlooked. The technology is there if the resources will band together to create integration and proper end-to-end processes.

Figure 3 shows that effective processes are enabled by the technology, with accurate, up-to-date, consistent data as the base. As you pursue new tools, focus on integration and availability of data across channels. The base and the pillars will come from the technology you buy and how you use it. Vendors may tell you, "we do it all… we'll deliver the integrated technology that will make all this happen for you." By all means, work with them if they can walk their talk. But at the same time, make sure that you consider where you are starting from, the tools you have and must continue to use, what gaps you have to fill, and how you will do so. It is a rare organization that gets to start with a clean slate, so reality begins with baselining the current state, defining where you want to go, and building a clear path to get there.

The Keys to Success

At a high level, the keys to success fall into three stages, all of which rely on *sustained governance:*

1. Planning: Planning requires visible senior management support, representation from all channel stakeholders (which could include contact center, IT, marketing, fulfillment/back office, etc.), and common goals and vision developed through coordinated strategic planning that ensures alignment with business goals. Then the stage is set for governance and commitment to omnichannel.

2. Doing: As a company pursues omnichannel, oversight of investments and resource allocations across all customer contact channels, plus a formal change management process, are crucial. A governance committee continues to oversee the effort, committing staff time and budget dollars to maintain the momentum from planning. While that sounds simple, it is often difficult and where historically things get derailed. At a more detailed level, implementation means crossfunctional teams working together on careful end-to-end process design, thorough integration and more.

3. Optimizing: Performance management will guide the team to assess and optimize both the customer experience and corporate outcomes. Clear targets for financial impact, customer satisfaction and other KPIs will hold the team accountable to deliver on the vision, including subsequent phases. The sidebar provides more considerations for the metrics and business case.

Many of these keys to success address the silos that are so common. The crossfunctional team goes beyond business owners and must include IT. Without them tackling the systems and integration issues, it won't succeed. The investment of money and resources, across departments, has to address all phases from planning, to implementation, and ongoing support and optimization.

The Pursuit of Omnichannel Begins Now

With a common vision that defines the tools required to achieve omnichannel—such as routing, reporting, analytics, CRM and KM—and resources to implement and optimize ongoing, you might actually make it happen this time around. Without that, you'll continue to have a "multichannel" environment, chipping away at your channel list by adding new ones or improving existing ones, but probably not creating a "seamless, integrated" environment for your customer experience. Partner with your counterparts across the organization as well as trusted vendors to define and pursue your journey on the right path. ◉

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WHERE'S THE BUSINESS CASE? AND WHO'S BUYING?

by Lori Bocklund

WITH SUCH HIGH DEMANDS FROM CUSTOMERS AND THE POTENTIAL DIFFICULTY IN DELIVERING OMNICHANNEL, ONE HAS TO ASK WHAT THE BUSINESS CASE IS FOR THIS SORT OF CHANGE, AND HOW DO YOU FUND IT?

IT certainly won't fund it on their own. Individual channel owners won't fund it, at least not in a comprehensive way ("I'll fund my channel, you fund yours" does not lead to omnichannel success!). So to build the case in the first place, you need the crossfunctional collaboration driven from executive-level sponsor(s) that can define the strategic goals for the company. That sponsorship will bring all the stakeholders into planning for and pursuit of a common vision. Omnichannel is not going to be about tactical needs.

The strongest business case is based on positive impacts on revenue. Customer retention, increased loyalty measured by customer value or products per customer, meeting customer expectations, and the resultant willingness to continue as a customer and promote the company (e.g., Net Promoter Score—NPS) can be translated into hard dollars over a baseline

of today's world with disconnected and/or absent channels. If your competition is outsmarting you on their channel offers and how they tie them together for a positive customer experience, the business case may be that the best offense is a good defense: You have to compete to survive.

Cost savings are less likely to occur, as most companies find that offering more channels does not lead to volume reductions on existing channels. Rather, overall contact volume tends to grow. Depending on the investment in process optimization to accompany channel-rich technology, there may be some handle-time savings or other "touchpoint" reductions. Proceed with caution against building this case on cost savings that may not materialize but saddle you with budget cuts that leave you understaffed.

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