



BLENDED AGENTS: BLENDING DIGITAL CHANNELS AND VOICE IN THE MODERN CONTACT CENTER

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Executive Summary

Delivering an exceptional customer experience today requires the ability not only to meet a customer on his or her channel of choice, but also to escalate to voice with all details of the engagement available to the agent who answers the call. Using computer telephony integration (CTI) to support a voice channel on the agent desktop alongside chat, text, email, and social media channels, as well as work items served up from the customer relationship management (CRM) system, is making a difference in the modern contact center. With a fully blended desktop, agents can move seamlessly across channels as they interact with customers and handle CRM work items. What's more, a blended agent solution enables a contact center to give special consideration to customers engaging via voice, allowing agents to focus those calls without distraction from other channels.

What's Driving the Modern Contact Center?

While many businesses have long built their brand identities and reputations around providing outstanding customer service, the importance of doing so is rising to new heights. As global consulting firm PwC explored in a March 2018 report, [“Experience is Everything: Here's How to Get it Right,”](#) customer expectations are fueling an “experience economy.” In surveying 15,000 consumers in the U.S. and elsewhere around the world, PwC found that nearly three-quarters of respondents identified a positive experience as a key driver influencing their brand loyalties. In addition, PwC's research revealed that 65% of 4,000 U.S. consumers surveyed found a positive brand experience to be more influential than a fantastic advertising campaign. It's of little wonder, then, that many businesses have elevated the importance of their contact centers, placing them at the center of digital transformation initiatives. To thrive in an experience economy, the modern contact center must have the ability to:

TIP! Don't underestimate the importance of people talking to people.

- Handle customer inquiries from voice and a variety of digital channels, including chat, text, email, and social media
- Integrate with CRM systems, for delivery of digital channels and support of work items such as cases or incidents
- Escalate customer interactions from digital channels and CRM cases/work items to voice support, seamlessly and as needed

Yet, as PwC pointed out in its “Experience is Everything” report, most businesses haven't struck the right balance with the technology they've deployed to optimize the customer experience. While consumers may appreciate the quick hit results available to them via a chatbot or social media exchange, PwC data shows that consumers want the opportunity for more, not less, human interaction. In fact, 64% of respondents indicated they believe today's customer experience lacks a necessary human component.

A chief takeaway from research such as this is that businesses cannot afford to overlook the importance of people talking to people — i.e., the human element — even as they bring their contact centers into the digital era.

In short, voice remains as important as ever for the modern contact center in delivering the ultimate customer experience. Consider these two realities of human nature: One, high-priority customers might always default to voice calls for personalized assistance from designated agents; and two, customers inevitably want to speak with skilled agents when their inquiries get too complex or difficult to resolve on digital channels. They expect to talk — literally — with an informed company representative who can address their needs quickly and efficiently.

In other words, delivering an exceptional experience today requires the ability not only to meet a customer on his or her channel of choice, but also to escalate the outreach to voice with all details of the engagement available to the agent who answers the call.

The Best Way Forward: Blended Agents

TIP! As a best practice, stop work from other channels when agents receive calls, so they can focus on the voice interactions.

From the get-go of their digital transformation initiatives, meeting this mandate requires that contact centers determine how to integrate voice calls in support of their omnichannel customer experience environments. A great way to do this is to think in terms of “blended agents,” using CTI to deliver a voice channel on the agent desktop alongside chat, text, email, and social media channels, as well as work items served up from the CRM system. With a fully blended desktop, agents can move seamlessly across channels as they interact with customers and handle

CRM work items. What’s more, a properly implemented blended agent solution enables a contact center to give special consideration to customers engaging via voice, allowing agents to focus those calls without distraction from other channels.

To illustrate, here’s a high-level overview of how InGenius Blended Agent supports an integrated solution with Salesforce Omni-Channel:

- From the InGenius interface, a blended agent handles customer interactions throughout the day across designated channels
- Through the same interface, the agent receives calls and Salesforce work items for a consolidated view of the customer interaction
- InGenius can support different models of blended agents: call-centric, fully blended, or work item-centric
- When an agent is on a phone call, the availability state can change to busy so no additional work items come in to him or her
- Once the agent wraps up a call, the log automatically updates in the CRM and his or her status changes back to available for calls or work from other channels
- InGenius enables configuration to the unique blended agent requirements for each contact center, all out of the box

Companies are already benefiting by using CTI and blended agents to support voice, a variety of digital channels, and CRM tasks. Among them is United Wholesale Mortgage (UWM), a fast-growing wholesale lender. At UWM, a single team handles all channels — chat, Web to case, and calls.

For inbound calls, UWM immediately populates agent screens with customer information pulled from Salesforce and delivered via CTI. With such intelligence at his or her disposal, anybody, from a receptionist to an underwriter, has the information needed for a personal greeting and to validate a caller — and quickly route the call to the most appropriate department for resolution. As evidence of the effectiveness of this solution, UWM has reported that following the integration, the underwriting team has been able to achieve all of its service-level targets 100% of the time — a significant achievement for the team.

The key values UWM has derived from the CTI and blended agent solution include:

Increased Agent Efficiency

- 50% increase in cases handled per day
- Case resolution within three hours with 100% success

Improved Customer Satisfaction

- 23% improvement to NPS since deploying the blended agent solution

Success Metrics

Among other benefits United Wholesale Mortgage gained with CTI and blended agents, the company realized a:

50% **23%**
improvement in cases handled daily increase in NPS

Making the CTI Call

With the ability to finesse voice calls along with digital channels and CRM tasks, agents across organizations such as UWM have been able to boost their productivity by saving time in resolving customer issues. With information at their fingertips, they can answer questions more quickly, process different work items, make more sales, or log calls faster, for example. Hand in hand with that quicker time to resolution comes improved customer satisfaction and a better overall experience; since agents have access to notes from previous interactions, customers are particularly happy that they don't have to repeat information as they move from one channel to the next.

Meantime, with better reporting, contact center managers have been able to reduce operational costs and streamline agent management processes. With CTI data, they not only can evaluate individual call records but also determine on an overarching level how their contact centers are performing.

To determine whether a blended agent strategy makes sense for your contact center, consider these two simple questions:

1. Do you want to look for ways for your agents to be more productive?
2. Do you want to improve response time across all channels?

Answering “yes” should lead to consideration of solution providers that can support seamless integration of voice calls and the CRM system in an omnichannel environment. In such environments, a common best practice for minimizing distractions and optimizing customer satisfaction is to prevent agents on voice calls from receiving chats, cases, and other work items. So be sure to consider which of three agent types would be optimal for your organization:

1. A call-centric blended agent who primarily focuses on calls, but completes work items during breaks in call activity
2. A fully blended agent who focuses on calls, cases, and leads in equal priority
3. A work item-centric agent who works on Salesforce cases, leads, LiveMessage or Live Agent chats within Salesforce but becomes available in the overflow call queue

Once you’ve decided on the type of agent that best suits your organizational needs, InGenius will provide the administration interface that will allow you to configure whichever blended agent model best suits your contact center.

Conclusion

As has been well documented, support for digital channels represents the next step forward for the modern contact center. Yet, as PwC found in researching the customer experience, going digital shouldn’t mean foregoing the personal touch. No matter how digitally savvy customers may be, they expect to be able to speak with an agent on demand, and they don’t want to have to repeat information they’ve already shared on another channel or that a company should have in its CRM. The best way to meet customers where they want to be met is by blending information from the CRM into an agent desktop interface that supports voice calls and a variety of digital channels. With a blended approach, an organization will reap a variety of benefits... for agents, operations, and customers.

About InGenius

InGenius quickly and easily adapts to unique contact center needs with advanced computer telephony integration (CTI). As a CTI innovator, InGenius connects existing telephone systems into leading CRMs with maximum flexibility, for world-class customer experiences. Backed by reliable expertise and superior customer care built over 20 years in the enterprise telephony space, InGenius helps contact centers increase productivity and customer satisfaction.

InGenius Connector Enterprise equips contact centers with features like screen pop, click-to-dial, automated call logging and enhanced call reports. The solution enables agents to efficiently serve customers and see a comprehensive view of customer call interactions for intelligent decision-making.