Effective Call Center Automation and Agent Support

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OVERVIEW

Who is Convergys?

RTM Mission

VUI - Financial Services IVR

GUI for Agent Intervention

MMUI PDA for self care

Future
## Convergys - Relationship Management

| Three Service Areas | § Customer Care  
|                     | § Human Resources  
|                     | § Billing  
|---------------------|------------------|
| Worldwide Capabilities | § 75,000 employees  
|                     | § 90 customer & employee contact, service and data centers worldwide  
|                     | § Over 575 clients in 70+ countries speaking 35 languages  
|---------------------|------------------|
| A Leading Public Company | § Listed on NYSE, S&P 500, Fortune 1000  
|                     | § A *Fortune* Most Admired Company for seven consecutive years  
|                     | § $2.8 billion in revenues  
|---------------------|------------------|
Centralize resources, skills and investments to deliver advanced self-service solutions with the best customer experience.

**Multi-Channel Self-Care**
- Speech Solution
- Web Solution

**Mobile Device Solution**
- Speech Solutions:
  - Hosted and premise-based solutions
  - Consulting and Professional Services
- Web & Mobile Device Solutions:
  - In Development

**Customer Data & Interactions**
- 360 degree customer view
- Consistency across channels
- Store customer history
- Behavioral Intelligence

**Automated Self-Care**
- Virtual/Invisible Agents
- Next level of self-service
  - Virtual agents
  - Remembering customer preferences
  - Correcting the experience in real-time

**Real-Time Decisioning**
- Dynamic Decisioning Solution
  - Rule-based business logic
  - Licensed or Hosted
  - Consulting and Professional Services
Customer-Centric Value Drivers

Customer Experience Management
• 70% of customers who switch do because of service quality
• 5% reduction in defections lead to 85% boost in revenue
• Remove obstacles and create engaging flows

Figure 1 Consumers’ Preference For Different Channels Varies By Activity

“How satisfied are you with each of the following ways to . . . ?”

<table>
<thead>
<tr>
<th>Channel</th>
<th>Research a product</th>
<th>Complete a transaction</th>
<th>Contact a company’s customer service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical location</td>
<td>9.5%</td>
<td>13.1%</td>
<td>6.9%</td>
</tr>
<tr>
<td>Web</td>
<td>12.5%</td>
<td>26.2%</td>
<td>15.2%</td>
</tr>
<tr>
<td>Phone agent</td>
<td>15.6%</td>
<td>29.4%</td>
<td>15.6%</td>
</tr>
<tr>
<td>Email</td>
<td>9.7%</td>
<td>13.1%</td>
<td>15.2%</td>
</tr>
<tr>
<td>Phone self-service</td>
<td>5.1%</td>
<td>8.2%</td>
<td>15.6%</td>
</tr>
</tbody>
</table>

Base: North American households

Source: Forrester’s Consumer Technographics® Q3 2005 North American Survey

Source: Forrester Research, Inc.

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Customer-Centric Value Drivers

Multiple Channels and Modes
- Customers expect care over multiple channels
- Unified view of customer interactions
- Secure, consistent and efficient care
- Channel Preferences and Trends:

<table>
<thead>
<tr>
<th>Channel</th>
<th>2006</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone (Live Agent)</td>
<td>25%</td>
<td>20%</td>
</tr>
<tr>
<td>Telephone (IVR)</td>
<td>10%</td>
<td>5%</td>
</tr>
<tr>
<td>Telephone (IVR-Voice)</td>
<td>10%</td>
<td>15%</td>
</tr>
<tr>
<td>E-Mail (Live Agent)</td>
<td>30%</td>
<td>40%</td>
</tr>
<tr>
<td>Web-Chat (Live Agent)</td>
<td>20%</td>
<td>15%</td>
</tr>
<tr>
<td>Web Self-Service (No Agent Needed)</td>
<td>5%</td>
<td>15%</td>
</tr>
</tbody>
</table>

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Customer-Centric Value Drivers

Interaction Analytics
• Behavioral Intelligence
• Proactive Care
• Personalized Experience

Behavior
Perceptions
Operations
Customer-Centric Value Drivers

Collaborative Care
- Live agent + Automation
- Agent Efficiency
- Multiple Knowledge Sources
- Decision Support

Have questions - need answers 65%

Need something done – order, change address, etc. 25%

Need something fixed 15%

Have a complaint - not happy 5%
Use Case:
Receive notice of recent deposit, and transfer an amount which requires SV for account security.

Transfer Funds

[Over $ threshold?]

SV

[Over $ threshold?]

SV Training

new user?

yes

no

Hi, <firstname>
A deposit of $2338 was made to your checking account yesterday.

What would you like to do?

Brandings

Voice Search

SV Enrollment
(prior session)

Personalization

Dynamic Decisioning

Robust NL

Mixed Initiative UI

Confirmation

Funds Threshold

Security Policy

Analytics

Personalization

Branding

Goodbye <firstname>

And thanks for banking with Paragon [music chord]
Transaction supports a “Invisible” agent that intervenes on demand. New visual paradigm for Agent display: call history, solutions, Call Flow analytics, Higher containment, High Customer satisfaction.
Multichannel / Multimodal self care device

- Consistent multimodal services and presentation
  - Voice and/or Web search
  - Human Factors Testing

- Conversational Interface
  - Flexible, open dialog
  - Voice Search ("show my account allocations")

- Speaker Verification for account security
  - Identity is verified from voice

- Invisible Agent with Dialog Monitoring
  - Agent assists both speech and web interactions

- Platform-Neutral Application
  - Standards based architecture
  - Analytics for behavior intelligence
Multimodal Self Care Demo
Multi-channel, Intelligent, Proactive, Personalized Service

For assistance 24 hours a day, 7 days a week, call 1-800- BANK CARE

Centralized Segment-Driven Business Rules Provide a Multi-channel experience that enhances CSAT & Loyalty

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Questions, Comments, Insights ????