The New Rules of the inbound contact center
Introduction

Things have changed in the contact center.

No longer is customer experience bound by the limitations of legacy on-premises system capabilities. Instead, new cloud-based solutions offer a much more flexible and agile approach, resulting in a dramatically improved customer experience. These changes are good news for contact centers, as customers today are more likely to take to the internet than pick up the phone in their attempt to communicate with your business, even if they are looking to complain. Now contact centers can be prepared no matter what the communication channel.

Our 'new rules' take account of the new demands of customers and the availability of this new functionality, providing some guidelines on what the best contact centers should be aspiring to in order to delight customers.

As you will discover, this includes how to handle multiple channels including calls, emails, chat and social media. It also covers other new areas, such as how to best use data to automatically route customer contacts and how to proactively contact customers with issues.

With a cloud system that provides the tools for contact center managers to easily create and change customer contact flows (without recourse to the IT department) the only barrier to improved customer experience is the imagination.

As we see the rise of a more customer-centric type of business, the contact center is increasingly expected to contribute to revenue generation — a topic explored further in our 'Converting customer experience into revenue' report, using research with 1,000 consumers, and cited throughout this guide. In order to build customer loyalty and stand out against the competition, businesses need to deliver exceptional personalized customer experiences.

This is a huge challenge for businesses and the old rules of ‘answer it quickly and dispatch it quickly’ are simply no longer sufficient. Fortunately, some new cloud-based contact center platforms have been built from the ground up to help achieve multichannel success. But technology in isolation is not enough.

In order to achieve contact center success we need new skills and new strategies—and new ways of working with that technology. So we’re ripping up the old rulebook and writing a new one.
Who is this guide for?
If you manage contact center operations, are responsible for customer service or customer experience in your business, or you’re just interested in the dynamics of the multichannel contact center, then these new rules are for you.

They will help you run a more efficient contact center that delivers on revenue generation through improved customer service and efficiency.

What do we mean by ‘inbound’
In a traditional call center ‘inbound’ meant incoming calls. These were routed by the automatic call distribution (ACD) system, a fairly inflexible hardware platform designed purely to manage high volumes of incoming phone calls and route them to the right person or agent group.

But now within the new rules, inbound can mean both instant communication such as telephone calls or chat, and email or social media posts that don’t necessarily require an instant reaction, although speed of response is still vital.

Where the traditional ACD just directed calls, today’s cloud-based software platforms are game-changing in terms of the flexibility and capability they offer. They bring all channels together on a single platform with the ability to design intelligent, responsive customer contact flows in real-time, balancing staff resources with customer needs and increasing the percentage of successful contact outcomes.
RULE 1

Think **multiple** inbound channels
The old inbound rules were designed for call centers, not contact centers.

But Generation Y consumers are increasingly snubbing telephone communication, with West UC's research showing just 7% of 16 to 24 year olds will call a business even in relation to a high value sales query – a fifth of the number of over-55s who would do so.

This means that every aspect of your approach to running a contact center should now have you ‘thinking multichannel’. In fact, many customers go so far as to making purchase decisions based on a business' multichannel approach – 20% say they prefer to buy from businesses that offer multiple channels of communication. The new inbound rules have to be about an integrated strategy, where the multichannel customer journey takes precedence.

Channel Strategy
Don't jump into offering every channel going. Understand your customers and how they communicate, so that you can match the channel strategy to their needs. Recognize how customers are likely to use different channels, for example by sending an email for a non-urgent inquiry instead of calling, to avoid a queue. Or turning to social media or web chat to quickly work through a small issue that doesn't need a lengthy call.

When adding any new channels, ensure you're set up to handle them well as soon as they go live, with the right technology, skills and resource.

Consistency
A multichannel contact center must respond to customers consistently regardless of channel, whether it is email, telephone, web chat or social media. This means uniformity in tone of voice, with rules set around brand messaging (while bearing in mind that some channels are typically 'chattier' than others are).

CRM integration is essential to ensure that whichever channel a customer uses, the agent at the other end has the same information at hand to refer to.

Cross-channel Visibility
Make sure your system can intelligently present a unified view of all customer communications across all channels. This isn't just useful for the agent, it's another customer expectation, with 35% saying they think it is important for an agent to be able to refer to all previous interactions when talking to them. If it is done right, it can drive loyalty and further business, with 78% saying they are likely to recommend a company they can communicate with regardless of channel without having to re-explain their query or customer. If a customer is calling, after having already emailed the business, or sent messages on social media or chat, then it's essential that the person handling the call has this information at hand.

Smart Routing
Social media is an increasingly popular way for customers to get their viewpoint heard by companies, whether good or bad. In such a public forum, it is important that customer comments are addressed.

Customers can be routed to agents based on skills, just like calls, with all comments from a single customer presented to the same agent. You can intelligently route inbound emails too – based on the sender's email address or the content of the message. More on routing in Rule 2.
Agents’ multichannel skills

It’s important to note that different channels require different skills from agents. Don’t set your agents up to fail by throwing them in at the deep-end on a new channel they’re not used to. Give them the appropriate training and ensure that they understand how and why customers use channels too. Then tie this into skills-based routing to match calls and queries to individual agents’ to ensure that quality and attention to detail is optimal.

Done properly, blending multiple inbound channels will ensure your contact center is able to handle a greater volume of customer inquiries, potentially without increasing staffing levels.

TIPS

1. Approach everything you do in the contact center with a multichannel mindset. Understand which channels your customers use, how they use them and why.
2. Communicate your brand messages and ensure tone of voice across channels.
3. Ensure your agents have the skills and knowledge to communicate on new channels.
4. Assign priorities and skills so you can tailor your approach with the agents that you have and the channels that you use.
5. Give agents visibility of all customer interactions across all channels.
RULE 2
Route customers more intelligently
All too often, inbound call treatments or rules are designed at the implementation stage, essentially setting your contact center processes in stone; there's no room to refine or tweak the contact flows without involving the IT department and incurring significant IT costs and delays as well as long lead times. As a result, inefficiencies become standardized as customers are forced to follow a set path into the contact center, meaning customer satisfaction suffers and agent morale drops.

Being agile in your processes is vital to achieve high levels of customer satisfaction without soaring operational costs, which in turn enables agents to manage contacts across multiple channels while fulfilling both simple tasks and complex inquiries with ease.

It is also another way to drive customer loyalty and recommendations, with 78% of consumers saying they are likely to recommend a business that can direct their query straight through to an agent with specific expertise.

This is not just about interactive voice response (IVR). This is about using data and information that you already have to guide customers through their previous contact with you, making sure that they are better served and removing the ‘friction’ from interactions.

Data Direct Routing
In the modern inbound contact center, contact flows can be adapted in real-time, by anyone, with limited training requirements and without the need to involve IT or incur costs. Everything is based on data look-ups; from the moment the customer contact comes in. Their phone number, email address or even Twitter handle can be referenced in the CRM instantly to identify them. If there isn't an associated CRM entry, then they can be asked for an account number, or another piece of information.

Where they go from there is completely subject to how you want to assign the system to best serve your customers, and there are literally infinite possibilities. You could set simple and straightforward rules, like ensuring customers with an ongoing billing inquiry are routed to accounts. You can personalize the customer experience by drilling right down to the individual, making sure (depending on availability) customers go through to the agent they’ve spoken to before, helping assure the customer and allowing the agent to build a relationship.

In email, or social media for that matter, keywords can also be used as data points for more intelligent routing. Say you’re a consumer technology manufacturer; a keyword search for a certain product name would get forwarded to the appropriate team for that product, while anything containing the keyword ‘broken’ might go to support, or ‘invoice’ to accounting.

You can build in additional data look-ups and checks for even smarter routing too. Is the customer with a ‘broken’ device currently under warranty? Let this determine the path of the contact flow. Add as many layers as required to ensure the query gets to the right place quickly for a satisfactory resolution.

Demographic based routing
Going beyond using product or query level data points for intelligent routing, you may want to consider routing based on demographic and skills.

For example, automate calls from women aged 60+ to team members who have demonstrated ability to build rapport with that demographic. You can even take this principle to a global level. With your cloud-based contact center software you should be able to create global inbound numbers to present a ‘local’ presence in global markets. Then when you receive calls from a certain country, you can direct them to team members in or from that locality. This obviously has potential benefits in terms of language skills, but it also affirms your contact center's local presence, which is likely to build customer loyalty.
Respond to call flow fluctuation in real-time
The key to success is in total flexibility—the ability to set up your contact flow for optimum efficiency, whether that is more sales or greater query handling, always with a focus on improved customer experience. But you’re unlikely to hit upon the perfect system through guesswork.

This is where waypoint reporting comes in, allowing you to tag points in the contact flow to then track and analyze the stats and track the contact routes. Are you seeing a surge in customers going through to certain teams at certain times? Is there a point in your contact flow where customers are dropping off more than others? Setting waypoint tracking gives you a greater understanding of where customers go in the contact flow, so you can analyze, tweak and test on the fly.

Data dashboards and displays
It stands to reason that with this kind of real-time data available you should have a dashboard that allows you to view it in real-time, so you can make informed decisions as you go. There are also great benefits to making this data transparent across the whole contact center too.

The modern wallboard is a digital display that can present the data from your key call flow waypoints to everyone in the contact center, so agents also know where the sticking points might be and where they can be focusing their efforts. KPIs can be integrated too, to show how teams or individuals are doing on call volume or customer satisfaction, introducing a healthy level of inter-agent competition.
RULE 3

Make it easier to self-serve
As we all walk around with the entire internet in our pockets nowadays, a large proportion of the reasons you might call a contact center become null and void.

Our research shows that customers of all demographics are most likely to go to the web first, for queries ranging from initial research through to post sale questions and even complaints.

For many of your customers, actually contacting you will be a last resort, and ensuring you are helping as many of those people as possible to self-serve is not only good customer service, it's more efficient.

Self-serve online and in queue
Self-service can be carried out at multiple levels. As the rise in self-service has come about in the age of the internet, the obvious place to start is your website. A well managed and up-to-date online FAQ can do wonders for your inbound contact volumes.

If you find you’re getting the same or similar questions from customers via inbound queries, then consider addressing them in the FAQs on your website to head off more customers’ questions before they’re forced to call or email.

Self-service can still work after the customer has picked up the phone, with customers that have less complex issues able to interact with the system in the call queue. Intelligent data look-ups can be implemented to personalize the customer experience and potentially circumvent the need for them to speak to a live agent at all.

There are multiple ways that this could work. At a basic level, playing simple information like store opening hours to customers in the queue can have a surprising effect on the number of customers who hang on to speak to someone.

On a more personal level, you can opt to play information such as the courier service being used or the customer’s expected delivery time, which can often be the only reason they were calling in the first place.

Complex interactions such as payment processing can also be completed. The customer inputs his or her order number via the keypad, before entering card details in a seamless and entirely PCI compliant process.

This kind of interaction can also take the place of a data look-up where the customer data is not available – request an account number to direct the customer’s call through to the right agent or team. But make sure customers don’t have to then repeat this information once they get on the line with someone, as this can cause frustration.

Automating incoming queries for these kinds of issues frees up your agents to focus on handling the more complex inquiries and helps to build successful long-term relationships with your customers.
Matching customer needs
Of course the key to a successful approach is designing your self-service channels around your customers’ needs. Automation and self-service must be used intelligently and you must know your customer demographic. Automated contact center systems have the potential to frustrate customers if options are not tailored to their wants and needs, and old style interactive voice response (IVR) systems rigidity would often hinder rather than help customers. Optimize these to make the process easier and ensure they do not add unnecessary barriers for those who need to speak to a live agent.

Ensure your menus are uncluttered and review the channel continuously - customer needs change frequently! And make self-service an option, not a necessity – there will always be those customers who prefer to speak to a human being.

TIPS
1. Provide self-service at multiple levels, online and in call queues, matching self-serve options to customer needs.
2. Offer site search and a comprehensive FAQ, and review what customers are looking for on a regular basis.
3. Always give customers the option of talking to a live agent to avoid frustrating those who want to talk to a human being.
4. Intelligently use information gathered from call queue interactions as a way to personalize customer experiences.
5. Use in-queue personalization to pre-empt customer queries.
RULE 4

Use dynamic scripting
Much like call flows, call scripts were traditionally static.

They required agents to read from them verbatim, and did not adapt to the needs of the customer or the information supplied. As a result, agents ran the risk of sounding robotic, unable to deviate from the script, even if a customer request made this the most logical thing to do.

Static scripts can lead to frustrations for both customer and agent, which in turn leads to operational inefficiencies as call times increase and queries go unresolved. It can also lead to lost business – our research showed that agents not adapting to or understanding a query would be likely to lead 72% of customers to consider switching to a competitor. It’s no wonder why static scripts are rapidly being left behind in today’s more personalized, customer-centric world.

Building personal relationships with your customers

Dynamic scripting doesn’t just give agents the flexibility to respond to customers in a more human way. If done well, it will also dramatically increase the percentage of successful call outcomes, helping contact centers meet First Contact Resolution (FCR) targets, as well as increasing customer satisfaction and potentially reducing call durations.

Today's advanced and flexible agent scripting tools will guide agents through their interactions. This applies to simple step-by-step guides for straightforward inquiries, to dynamic branching scripts that offer a range of options for agents as they guide their customers through more complex inquiries.

A dynamic scripting system pulls data from your CRM, adapting to the customer's information so that the agent has the right prompts at hand and doesn’t ask the customer irrelevant questions or to repeat information. If there is limited or no CRM data available, the script can act almost as its own 'mini CRM', adapting to information as it's entered.

Simple “drag and drop” scripting elements empower operational staff to create, manage and modify call scripts, essential for ensuring that brand messaging is consistent. Potentially complex interactions, such as taking payments, can be integrated to trigger at the appropriate points, making the process simple for both agent and customer.

Follow the script

Just as you assign waypoints in your contact flows, you can do the same in your dynamic scripts. Track where customers’ conversations with your agents go, and monitor the data alongside what you’re seeing in the call flows to get a true picture of where any potential sticking points might be and which parts of the script are really performing well. Then you can tweak, test and optimize.

**TIPS**

1. Ensure you use an integrated scripting tool that works seamlessly as part of the wider contact center solution. With a unified solution there's no compatibility issues as it's not an ‘add-on' offering but a comprehensive end-to-end system.
2. Look for a range of sophisticated data integration features, allowing you to pull data from your CRM, client server and web applications, or function as a standalone mini CRM platform for your contact center, if required.
3. Use your call scripts to ensure the messages your agents are using with customers are consistent with those in use on other channels.
4. Scripts should be flexible, offering all the prompts agents need while adapting to the information at hand about the customer, personalising the experience and allowing the agent to build a relationship.
5. In today’s complex regulatory environment, it is essential your contact center has the ability to evolve scripts to respond to changes in compliance requirements. Look for a solution that can also include PCI-compliant card transactions seamlessly in scripts.
RULE 5

Prioritize your contacts by channel
This was mainly because the old inflexible ACD system was ill-equipped for the task. It could direct calls according to where the customer told the interactive voice response (IVR) system they needed to go, but that was about it.

In the new multichannel contact center, we have to get our priorities in line with customer expectations. Our research shows that the amount of time customers expect a response differs wildly depending on channel naturally, as part of the decision making process for a customer when choosing a communication method is their convenience, and how urgent they consider their query to be. So how do you adapt to those differences?

**Instant, reactive, proactive**

It can be useful to put your inbound contacts into three categories and set service levels for each one, based on the particular needs of that channel.

**Instant:**

This includes telephone calls and chat. The majority of people – 62% – expect a call to be answered in under five minutes, with 12% expecting it to be under one and a further 20% willing to wait up to 15. Making sure every call is answered the moment it comes through may not be entirely practical at high volume times, and call queuing may be necessary, but with intelligent call distribution using a well optimized contact flow and good resource management, these instances can be minimized.

A smaller but still significant majority of 51% expect chat messages to be responded to in under five minutes. With chat or IM, ensure that customers are only given this option when there is an available agent there to respond immediately.

**Reactive:**

Email and social media fall into this category. These are important, but they may not necessarily require an immediate response. Customer expectations are quite varied on how long they are prepared to wait for an email response, but the majority (62%) expect it to be under five hours. This isn’t to say that a rapid response isn’t better of course, as over a third (35%) expect a reply to come in within the hour.

The best approach here is to set expectations for customers. For example, with an email autoreply to confirm the customer’s email has been received and that they can expect a response within 24 hours. Set Service Level Agreements (SLAs) that are realistic and that you can still adhere to in times of high traffic, but always strive to respond in a shorter time than promised.

This actually represents a significant opportunity to drive loyalty and recommendations, with ‘a quick response via email’ being the top result for experiences likely to lead customers to buying from a business again. Customers will be impressed if you ‘under promise and over deliver’ but not vice-versa.

If you are managing customer service queries via social media, responses again don’t need to be instant, but should be prompt, with a majority of customers (58%) expecting to hear back within an hour. Once again it’s about setting expectations – include operating times and be clear about how rapidly customers can expect a response on your page bio. It’s also worth being aware that if you’re running a Facebook page, Facebook will automatically present a normal response time to visitors based on your past interactions.
Proactive:
This is where you can really delight your customers. Customers like brands that care about them and through a proactive approach you can demonstrate the importance your brand places on its customers.

Your brand will be talked about online via social networks, but not all of those conversations will be aimed directly at you. They may not be posting to your Facebook page, or @replying your company handle on Twitter, but that isn’t to say that they don’t have an issue they would like resolved, or that there isn’t a chance for your brand to do something special for a customer.

By monitoring mentions of your brand across social networks you can influence those discussions. Monitored keyword and brand mentions can be streamed in real-time, and allocated in priority before being filtered to individual agents to respond. These are still inbound customer issues, but you must be proactive in responding to them. It’s a great opportunity to reach out and impress customers by helping them out before they’ve even approached you directly. Set up alerts to watch your company’s name to ensure you are on the ball and not missing out on potential customer interactions.

TIPS
1. ‘Bucket’ channels into priority groups to better plan resource and ensure you are meeting customer expectations.
2. A super-quick response to email or on social media can be a chance to impress a customer and build loyalty.
3. Inbound can be proactive; monitor social media for customer issues and resolve them before the customer has even approached you directly.
4. Use channel bucketing as a priority ‘layer’, but allow more urgent queries or VIP customers to override and trigger higher prioritization or channel pivoting.
RULE 6
Treat your best customers like VIPs
Considering that most businesses are subject to the Pareto principle, that 80% of your sales come from 20% of your customers, it makes sense to give those customers special treatment.

In a modern customer centric contact center strategy, where stand-out personalized experiences drive loyalty, treating your VIP customers the way they deserve to be treated can bring significant business benefits.

Who are your best customers?
The first step is to answer that question. Your best customers can be defined by practically any metric: total spend with your business, average spend per purchase, or perhaps they're not big spenders but they come back regularly. You might have a loyalty program in place that you can integrate, or consider a scoring system based on a combination of metrics.

How to provide the VIP inbound experience
Once you have defined criteria, you can start setting up your VIP rules. Use data look-ups to check if the number or email is associated with one of your VIP customers in order to define their special treatment. That could simply mean they get prioritized in the call queue, or it could be that they are directed to a set team – say if you have an agent team specifically for the purpose of handling members of your loyalty program, and you want all member calls and emails to go straight to them. Just keep in mind over a third (35%) expect a reply to come in within the hour.

The best approach is to set expectations for customers. For example, with an email autoreply to confirm the customer's email has been received and that they can expect a response within 24 hours. Set Service Level Agreements (SLAs) that are realistic and that you can still adhere to in times of high traffic, but always strive to respond in a shorter time than promised.

You could take advantage of your adaptive contact flow to personalize down to the individual, assigning a specific agent to a customer so their calls get routed through to them whenever they're available, with a secondary agent to try if not.

It might be that you have one customer that is so special, that you don't even want the contact center’s opening hours to apply. In that case you can create a rule to ensure that when they call in at 6:30pm it routes through to a mobile number and passes them straight through to the sales director.

TIPS
1. Drive additional loyalty and spend volume by focusing on the 20% of customers who drive 80% of your sales.
2. Determine who your best customers are, according to metrics like total, average or regularity of spend.
3. Provide the VIP experience by routing through to specific agents or teams, prioritising them in call queues or by providing service outside of normal operating hours.

In the inbound contact center of old call routing was static. The ACD sent calls through to agents as they became available, and your best customers were stuck in the call queue with everyone else.
RULE 7
Blend inbound with outbound
Traditionally, contact centers relied on two different technology systems: one to route inbound calls and another to make outbound calls.

As a result, teams tended to be separated into silos, with the different skillsets required to manage the two different types of calls.

Of course this was not very efficient in terms of managing resources, resulting in staff sitting idle between peaks in call volumes or with queues mounting during busier periods. Call blending solves this resourcing dilemma and is increasingly becoming the norm in the modern contact center.

The new norm
New cloud-based platforms make call blending much easier to achieve by cost effectively and transparently automating the whole process and seamlessly switching agents between inbound and outbound in line with demand. As it’s automated, this frees up managers to focus on business critical tasks while the platform monitors and manages the call queues to meet service levels.

Blending and the customer experience
In addition to allowing you to maximize agent resources, blending also allows you to take a more holistic approach to customer relationships and empowers contact center agents to expand their skillset and job satisfaction levels. You know you will have times where inbound contacts subside, so make these ebbs in volume a core part of your strategy, to ensure you use the extra time effectively.

If your inbound volume has eased off, then automatically switch over to outbound communications that satisfy customers or drive sales, such as carrying out a survey, notifying customers of your latest offers, activating account renewals or calling past customers about reactivating.

Earlier it was mentioned that you can delight customers by exceeding expectations on response times, but you can also do that by blending across channels. If inbound call levels drop to a certain level, agent resource can be put to task on calling customers who have emailed in, before they were expecting any response at all.

All of these things can be automated by setting the right rules, allowing you to over-deliver on customer experience without over-straining your agent resource.
Skilled and knowledgeable agents

As mentioned earlier in this guide, you shouldn't jump into offering new channels without being ready to manage them well, and a large part of this is down to agent skills and training. This is true when it comes to blending inbound, outbound and multiple channels. Where the inbound or outbound agents of old might have had the skillset for one discipline, now they need a range.

You need highly skilled, knowledgeable contact center workers who can communicate fluidly with customers whatever the channel and know your products and services well. The technology will do a lot behind the scenes in terms of connecting customers to the right agents, and then prompting with relevant information, but with self-service filtering out simpler inquiries, agents need to be subject matter experts.

Recruiting agents with the potential for these skills should be part of your hiring strategy, and you may find that offering home working (simple to implement with a cloud based contact center) gives you access to a much wider talent pool in order to achieve this.

TIPS

1. Choose a platform that is capable of automating the entire blending process, giving you the ability to automatically fill any gaps in demand and ensure service level targets are consistently being met.
2. Blend across inbound and outbound, and across channels, to maximize resource and increase speed of response to customers.
3. Make hiring ‘super-agents’ part of your recruitment strategy for future hires – flexible agents that are skilled across multiple disciplines will be invaluable in the contact center of the future, considering home-working to broaden the talent pool you have access to.
RULE 8

Don’t forget about outbound
In the previous section we talked about delighting customers who have emailed with a personal phone call, exceeding their expectations. But it might be that they aren’t available by phone at that time; it’s quite likely that that could be the very reason they used email to contact you. You might delight the customers you get through to, but your connection rates are probably going to be low.

Intelligent retries
There are fantastic potential benefits to making this a core part of your strategy, particularly if you have high volumes of inbound contacts via email or your website. Any sales team knows that the chances of closing a deal are an order of magnitude higher over the phone than they are via email. But in order to do that, you need to maximize your chances of actually getting them on the phone—and all the better if you can ‘warm them up’ for the sale in the process.

As an example, you could simply adapt call-backs by time. If someone makes an inquiry to your website at 2am, an intelligent strategy would not involve calling them back at 9am the next morning. Instead, set the rules to send an email immediately to acknowledge their inquiry, then an SMS at 11am to warm them up to expecting a call before making the call at 2pm. If they don’t answer, automate an email or SMS letting them know you tried and when you’ll be giving it another shot.

We discussed self-service earlier, and how customers will increasingly choose not to pick up the phone to contact a business, preferring to find the information themselves or communicate via email, chat or social media. ‘Gen Y’ and ‘millenials’ are particularly keen to do anything other than talk on the phone, but by using SMS or another channel to warm them up they are more likely to get them to pick up a call, making your chances of a sale greater.

As with just about everything else, data should inform your strategic decision making. If you’re getting higher connection rates from calls in response to inquiries at a certain time, tweak the rules appropriately. Integrate customer data too – perhaps it’s one of your VIPs, and you know they’re most likely to answer if you call their mobile at 6pm as they’re leaving work.
Online and queue call-backs

This kind of strategy works well when offering customers a call-back option on your website, but you can do the same in a call queue. If inbound volume is at a peak, set a rule to offer customers the opportunity to request a call back. They can keep their place in the queue and have a call from the next available agent or they could request a specific time later in the day that is more convenient. You can even give customers the option of inputting a different number that they would prefer to be called back on.

**TIPS**

1. Responding to inbound queries with an intelligent outbound strategy doesn’t just lead to delighted customers, it can have a huge impact on driving sales.

2. Use data to inform your retry strategies, and optimize them to achieve the best connection rates and ultimately sales.

3. Offer a call-back option via your website and in call queues – not keeping people waiting equals happier customers and more sales.
RULE 9

Give agents a **single view** of customers
A synched approach is essential in the multi-channel contact center. The smartphone generation not only expects to be able to interact with brands across multiple channels, it also expects continuity between these channels.

Customers who start trying to resolve their problems on email will often take to social media and then escalate to a phone call if they are not satisfied.

Your agents might be part of the smartphone generation themselves, as at home responding to tweets as they are answering calls. They might be the skilled agents we mentioned earlier, great communicators who know your service and products inside out.

But without a single, integrated view of all the customer across channels, all that can be a bit redundant. Agents can waste valuable time trying to understand customers, causing delays and frustration for both parties, damaging brand reputations and relationships.

View multichannel contacts in one simple friendly interface
For traditional contact centers this has presented an expensive and complex integration challenge, where agents have had to manage multiple applications on the desktop. With a state-of-the-art cloud deployment, contact centers benefit from a fully integrated multichannel contact center solution where both customers and agents can pick and mix communication channels from one simple, friendly and fresh web interface.

TIPS
1. If you cannot integrate legacy systems into a single view, look for a cloud-based system where all the interactions are automatically laid out in one screen, enabling your agents to support the customer to a successful conclusion, quickly and efficiently.
2. Not only should you provide all agents with a unified view, the experience should be the same wherever they are working from, so your home-working agents have the same experience as those in the office or at another location.
RULE 10

Close the customer feedback loop
Finally, after all the hard work has been done in providing outstanding customer service to your inbound contacts, you’ll want to know how you did.

Customer surveys are the last component of the feedback loop, enabling you to continuously improve the service you are offering. They can often uncover missed opportunities and represent a post-sale opportunity to drive further loyalty, with 31% of customers more likely to be loyal to a business that follows up on even negative feedback.

Multichannel feedback
Your approach to customer feedback should be much like your approach to everything else in your inbound strategy—multichannel. In fact, if you’ve followed our advice and matched the communications channels you offer to your customers’ preferences, it should mirror that same strategy.

Customer feedback can be captured in a number of ways, post-call via the keypad, in SMS, via email, submission via a web form, or even an outbound call at a later date. Be sure to ask questions, such as whether a customer’s query was resolved, as any instances where this is answered in the negative can then be quickly addressed by automatically triggering an outbound call.

Often a customer can become too frustrated to continue speaking to an agent, but won’t mind saying their problem is still unresolved in a survey.

All feedback gathered should be displayed alongside the more empirical data in your dashboard and on your contact center displays for agents to see. It should help you address where customer satisfaction isn’t best, and learn from where it is.

**TIPS**

1. Ask the important questions to ensure customers’ queries are resolved, alongside softer questions on how they felt about the service they received.
2. Approach customer feedback with the same multichannel mindset you have with everything else in the inbound contact center.
3. Automate pro-active follow up actions based on negative survey responses.
4. It’s called feedback for a reason – use the findings to continuously improve the service you provide.

We discussed self-service earlier, and how customers will increasingly choose not to pick up the phone to contact a business, preferring to find the information themselves or communicate via email, chat or social media. With younger generations preferring to do anything other than talk on the phone, using SMS or another channel to warm them up is more likely to get them to pick up a call, making your chances of a sale greater.

As with just about everything else, data should inform your strategic decision making. If you’re getting higher connection rates from calls in response to inquiries at a certain time, tweak the rules appropriately. Integrate customer data too – perhaps it’s one of your VIPs, and you know they’re most likely to answer if you call their mobile at 6pm as they’re leaving work.
Summary
Running an inbound operation in a call center has never been simple. But in today's multichannel world, the inbound contact center is even more complex.

Fortunately, as communications technology has evolved in the broader sense, it's evolved in the contact center too. The features available with a state-of-the-art, cloud-based contact center platform mean you are equipped to manage whatever your customers come to you with, however they choose to approach you.

It's not all about technology, though. Having the right skills, management, processes and strategy is critical. Hopefully this guide has helped you to get those elements right.
Features to look for in inbound systems.

Technology was a limitation in inbound call centers of old, but in the modern contact center it is the great enabler. So what technology do you need in your contact center in order to follow the new rules of inbound? We've put together a checklist of features you need to succeed.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Integrated multichannel applications</strong></td>
<td>voice, email, instant messaging, social media, and more – make sure you have the whole package of communication channels fully integrated.</td>
</tr>
<tr>
<td><strong>Easy to use contact flow editor</strong></td>
<td>adapting how your inbound contacts are managed shouldn’t require the involvement of IT. Making changes to your contact flow should be a quick and simple process.</td>
</tr>
<tr>
<td><strong>Data directed routing</strong></td>
<td>data should be the foundation on which much of your inbound contact center is built, including how contacts flow. Your contact flow tool should use intelligent data look ups to direct customers and personalize their experience.</td>
</tr>
<tr>
<td><strong>Waypoint reporting</strong></td>
<td>with the ability to tag points in the contact flow, you can see where potential pain points are as well as where KPIs are being hit so you can continually adapt your strategy.</td>
</tr>
<tr>
<td><strong>Real-time and historical reporting</strong></td>
<td>being able to track everything in real-time is fundamental in running a responsive, agile contact center. Choose a system that allows you to create dashboards to track everything, and make this transparent across the contact center on digital displays.</td>
</tr>
<tr>
<td><strong>Call queue management</strong></td>
<td>look for a system that can play targeted offers or relevant messages to customers in the call queue as well as offer options for self-service interactions such as reporting minor service issues or make payments.</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Call backs</td>
<td>Your call queue system should also be able to give customers the option of requesting a call back. Even better, it should be integrated with a web-based call back option.</td>
</tr>
<tr>
<td>Outbound integration</td>
<td>You should be able to blend inbound and outbound for better resource management, but also to best optimize your outbound strategies with intelligent multichannel retry strategies.</td>
</tr>
<tr>
<td>Dynamic scripting</td>
<td>Flexible scripting improves the customer experience and eliminates frustrating conversations where the customer has one issue and the agent is reading a script that addresses another. Your scripting tool should be dynamic and flexible, as well as offer reporting similar to that in your contact flow, to reveal which messages work and which don't.</td>
</tr>
<tr>
<td>Global inbound numbers</td>
<td>Wherever you are in the world, if you have international customers you can create a local presence.</td>
</tr>
<tr>
<td>Single view of the customer</td>
<td>Being available on multiple channels is of no use if the agent can't get the full customer picture in one single view.</td>
</tr>
<tr>
<td>Quality monitoring and customer surveys</td>
<td>Close the feedback loop by recording calls and monitoring for quality, as well as issuing customer feedback surveys after calls to see how you they think you've performed. Then automate outbound follow up calls from those who have shown they are dissatisfied.</td>
</tr>
</tbody>
</table>
Who is West Unified Communications Services?
At West, we’re dedicated to a single proposition—making communication easy. Whether it’s coworkers across the office or partner firms around the globe, enabling that connectivity is the hallmark of our work. Our mantra? We Connect. We Deliver.

Every person on the West team is focused on providing solutions and services that make better connections and deliver real results—not just for our customers, but for our customers' customers. When it comes down to it, if you can't talk and share information internally or with people outside your company, your business isn’t going anywhere.

West is dedicated to shedding the jargon around unified communications and providing specific, concrete uses to those who benefit most. What’s that mean for you? We handle the complex stuff so you don’t have to. That's why West dedicates so much time, energy and investment in the unified communications space.

Unified communications has a lot of pieces and West covers them all.

For more information on our services, give us a call. 855.544.0455