



Automating
Customer Promise
Management with
**Conversational
Service Automation**



Introduction

Contact center call volumes are on the rise and show no signs of slowing down. With agents inundated with calls, average hold times have increased and – along with them – customer frustration.

To manage the wave of increasing calls and alleviate the pain points, contact center automation has become widely adopted. The benefits are clear. McKinsey & Company research shows that companies that automate 50 to 70 percent of tasks can reduce process time up to 65 percent; lower costs by as much as 35 percent; and achieve an error rate reduction of 15 percent.

While there are many ways to increase automation within the enterprise, Robotic Process Automation (RPA) has become the most prevalent avenue in recent years. For contact centers, leveraging RPA can directly translate to lower average handling times (AHT), less work from repeat callers, and increased agent productivity.

In fact, according to Forrester Research, two thirds of contact centers are already planning to deploy RPA as part of their digital transformation initiative. Combining RPA with Conversational AI will transform the customer experience, and the starting point to front-office automation is Promise Management.



Smarter Promise Management

Almost every call center interaction involves promises or commitments made by agents, such as an offer to receive a billing credit, or a time slot when a technician will visit your house to fix your internet connection, and more. Building brand trust and loyalty starts with the accurate, timely, and documented fulfillment of these customer commitments.

97% of call center professionals said automating and streamlining the process of meeting and fulfilling customer expectations would be valuable.

(Uniphore Call Center Survey: December, 2020.)

In most contact centers today, agents must register promises and commitments manually. They need to go back and forth, inputting data and reviewing multiple screens, to ensure that the commitment has been registered and is being fulfilled. Additionally, once they've confirmed fulfillment, they need to close the loop with the customer. Most often today this isn't being done, leaving customers frustrated with no follow-up from their interaction. Managing all of these steps manually is time-consuming, laborious, error-prone, and frequently results in failure to meet customer expectations.

With a Conversational Service Automation (CSA) Platform, companies can automate the entire Promise Management process: capturing and registering the commitment being made; managing promise fulfillment with end-to-end workflow automation; and updating the customer throughout the process.



By automating and streamlining the process of promise fulfillment, companies can:

- **Reduce customer churn** – by delivering on promises that are made and aligning expectations
- **Increase efficiencies**– by simplifying workflows, eliminating manual tracking and fulfillment of promises
- **Improve customer experience and advocacy** – by aligning customer expectations, reducing repeat callers and using real-time insights to gauge the pulse of the customer during interactions

CSA Enables Automation of Promise Management

With a CSA Platform, companies can automatically capture, monitor, and manage the tracking of promises made during customer interactions. To achieve this intelligent, end-to-end automation requires core technologies, including:

Conversational AI



RPA



Workflow Automation



Conversational Artificial Intelligence (AI)

Conversational AI allows for quick and automated extraction of data from every contact center interaction. Together with Natural Language Understanding (NLU), Conversational AI easily spots trends and patterns and supports processes that can't be managed by a human workforce.

During live customer agent interactions, Conversational AI recognizes and registers specific NLU keywords that relate to a promise or a commitment being made by the agent. For example, when an agent utters phrases like “would, should, will” etc., AI extracts named entities and promises made during the call.

During and following the call, AI-based automation registers and tracks promises and updates, and instantly updates all relevant customer records. The application also automatically generates any required customer notifications, outlining the promises made and the delivery timeline.

84% of callers expect a follow-up after speaking with an agent. With an AI-driven CSA platform, companies eliminate repeat callers by automatically closing the loop with customers.

(Uniphore Call Center Survey: December, 2020)

RPA and Workflow Automation

RPA bots work behind the scenes during every call, orchestrating and managing the identification, registration and tracking of promises through their fulfillment. The RPA bots enable expedited integration with other systems within the enterprise as well as heightened agility to cater to changes. Workflow automations include getting approvals as needed based on the nature of the promises, updating different system records, and notifying any change to the customer in real-time.



Cross Industry

Following are real-world examples of how a CSA platform leveraging Conversational AI, RPA and Workflow Automation provides value across various industry verticals.

Retail Banking

Many bank branches were closed as a result of COVID-19. In fact, the 2020 Accenture Global Banking Consumer Study reports that the volume of in-branch transactions in the U.S. has decreased by 30-40 percent. This change has driven banks to accelerate digitalization in order to service customers online.

However, the Accenture report also warns “...without an emotional connection, banking services are likely to become commoditized, with consumers focusing on price alone.” At the same time, non-traditional banking services continue to encroach the turf of traditional banking institutions.

These trends have further heightened the necessity for traditional banks to ensure a superior customer experience. To compete, banks must maintain and strengthen trust. Maintaining trust starts with fulfilling commitments.

Banking self-service options have already been widely automated, increasing contact center efficiencies. With a CSA platform, banks have an opportunity to differentiate themselves even further, while improving internal efficiencies.



By optimizing and automating processes, while injecting a personalized experience into the journey, banks increase customer trust that their requests will be managed properly, ensuring that promises are kept in regards to:

- **Financial management services** – scheduling and confirming advisor appointments and automating follow up
- **Loan approvals** – providing all documentation and closing at agreed-upon times
- **Opening new accounts** – ensuring that no monthly fees are charged if that was the commitment made

Telecom

As a result of remote work and remote learning with COVID-19, fast and reliable home connectivity is in demand now more than ever. According to Leichtman Research Group, there were more net broadband additions in 2020 than in any year since 2008.

In 2020, the number of broadband subscriber additions were 4.86 million, which is 190% more than the 2.55 million broadband customers that cable and telco companies added in 2019. (Leichtman Research Group)

To stay competitive, these companies must look at improving customer service. Telecom as a whole has the lowest net promoter score (NPS) for customer loyalty across all industries. Following subscription costs, poor customer service plays a key role in telecom customer churn.



By leveraging fulfillment automation, telecoms can provide a better and timelier customer experience to complete transactions, such as:

- **Service upgrade requests** – easily monitoring and ensuring new services from verbal agreement to installation
- **New equipment purchases** – expediting order processing and tracking fulfillment
- **Technician visits** – from scheduling to post service follow up

Healthcare Insurers

Healthcare insurers are facing higher member expectations. In a consumer-driven online world, members have become accustomed to fast and accurate fulfillment of purchases and services and expect the same with their healthcare providers. By automating processes within contact centers, healthcare insurers improve response times and maximize productivity.

NLP and AI-driven chatbots are already in use to support routine healthcare payer journeys, responding to policy inquiries, mailing of insurance cards, status updates, etc.

However, lack of follow-through remains a top frustration for most healthcare members. Members frequently and routinely call healthcare insurance companies to follow up on unmet or excessively delayed commitments. This not only costs healthcare insurers in terms of the time spent manning all of these calls, but also hurts them in member satisfaction and trust.



By leveraging a CSA platform for customer fulfillment, healthcare payers can alleviate these problems and provide a transformed member experience, such as:

- **Service upgrade requests** – easily monitoring and ensuring new services from verbal agreement to installation
- **Claims processing** – providing accurate status on claims and ensuring timely follow up on verbal agreements such as updating members once claims are approved, eligibility and more
- **Telehealth** – ensuring consistent care and follow up after a remote telehealth appointment
- **Enrollment** – automatically confirming plan enrollment and commitment to send ID cards

Digital Transformation Extends to Customer Fulfillment

Contact center automation has become a top business priority, with automation required before, during, and after the call. Digital transformation must result in transforming the customer experience with improved efficiencies. Most call center interactions generate specific requests, and trust starts with keeping those promises. Customer trust is emboldened when promises made during interactions are fulfilled, and the trust is further enhanced when the customer is kept in the loop during the fulfillment process.

Getting the right information to the right person to meet your commitments has to be an automated process that is able to capture all the necessary contextual information. Given the number of commitments made on a daily basis, businesses cannot effectively



manage this process in a manual manner.

Combined with Conversational AI, RPA and Workflow Automation, a CSA platform can easily identify promises from calls and track them to completion. By harnessing the power of AI-driven automation within a robust CSA platform, companies have the ability to optimize contact center efficiencies, automate repetitive tasks, and lower costs, while improving customer advocacy and experience.

While doing so, they are more effectively meeting their customer commitments, improving brand trust, and increasing customer satisfaction.

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