



Clone Your Best Agents

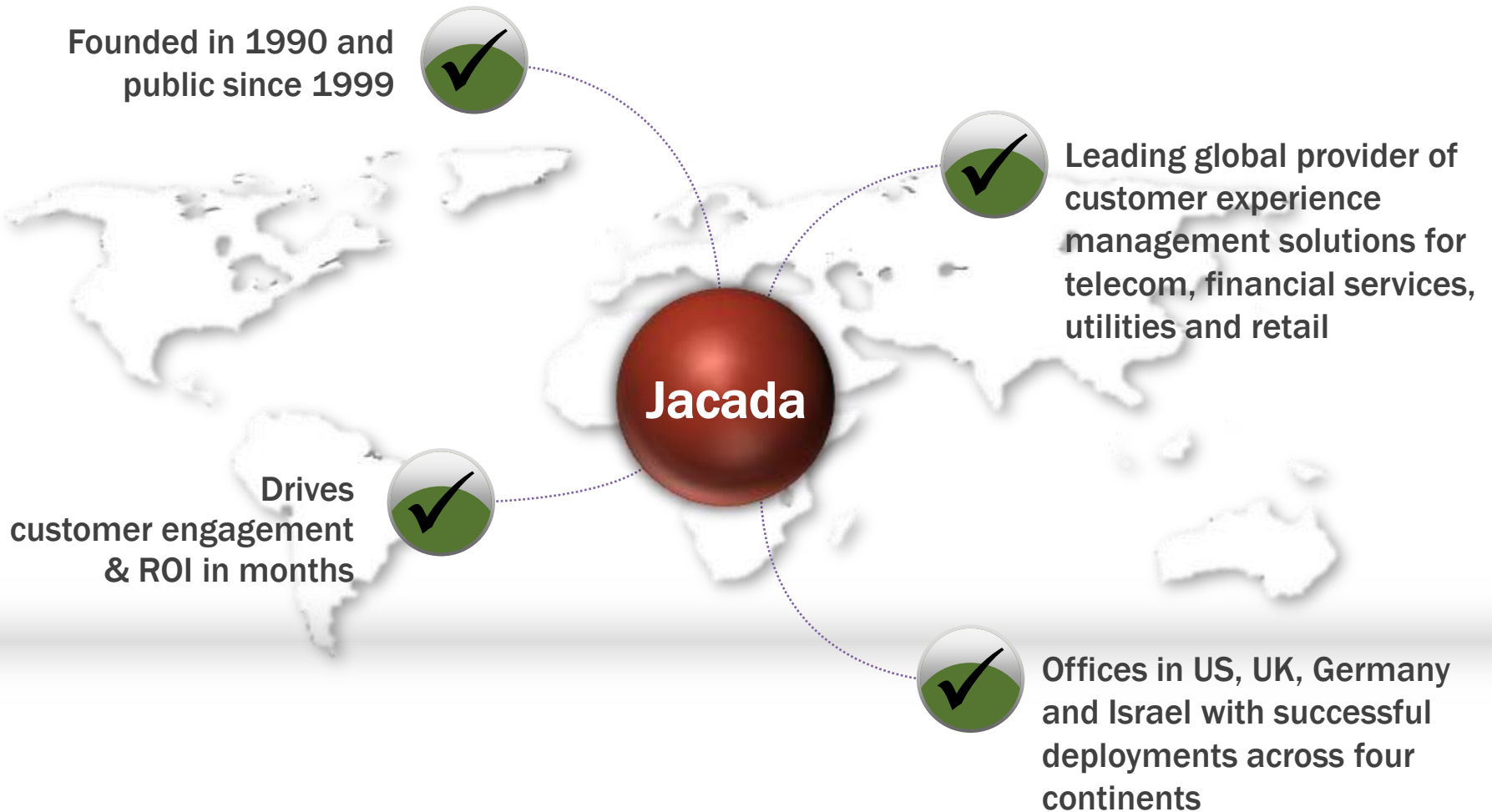
Learn how to make all of your agents your best agents,
while optimizing your processes.

December 19th 2012

Kumaran Shanmuhan
Executive Director of Solution Consulting at Jacada



About Jacada



About the Webinar



Why Clone Your Best Agents?

Cloning Your Best Agents | A Framework

Jacada's Solutions for Cloning Your Agents

Q&A

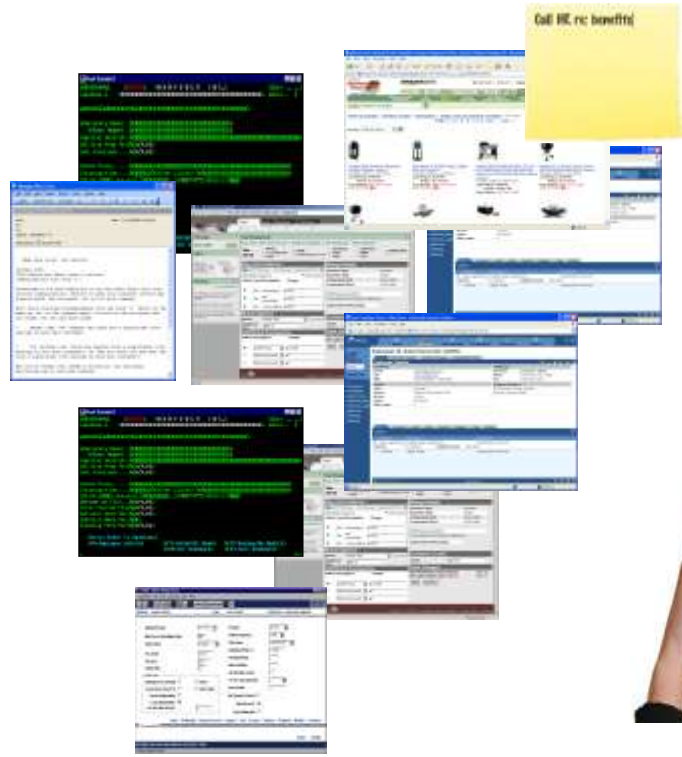
Analyst Research

Best Practices

Pitfalls

Case Study

Why Clone Your Best Agents? | CX Today *Jacada*



Marketing



Sales



Product Information



Finance

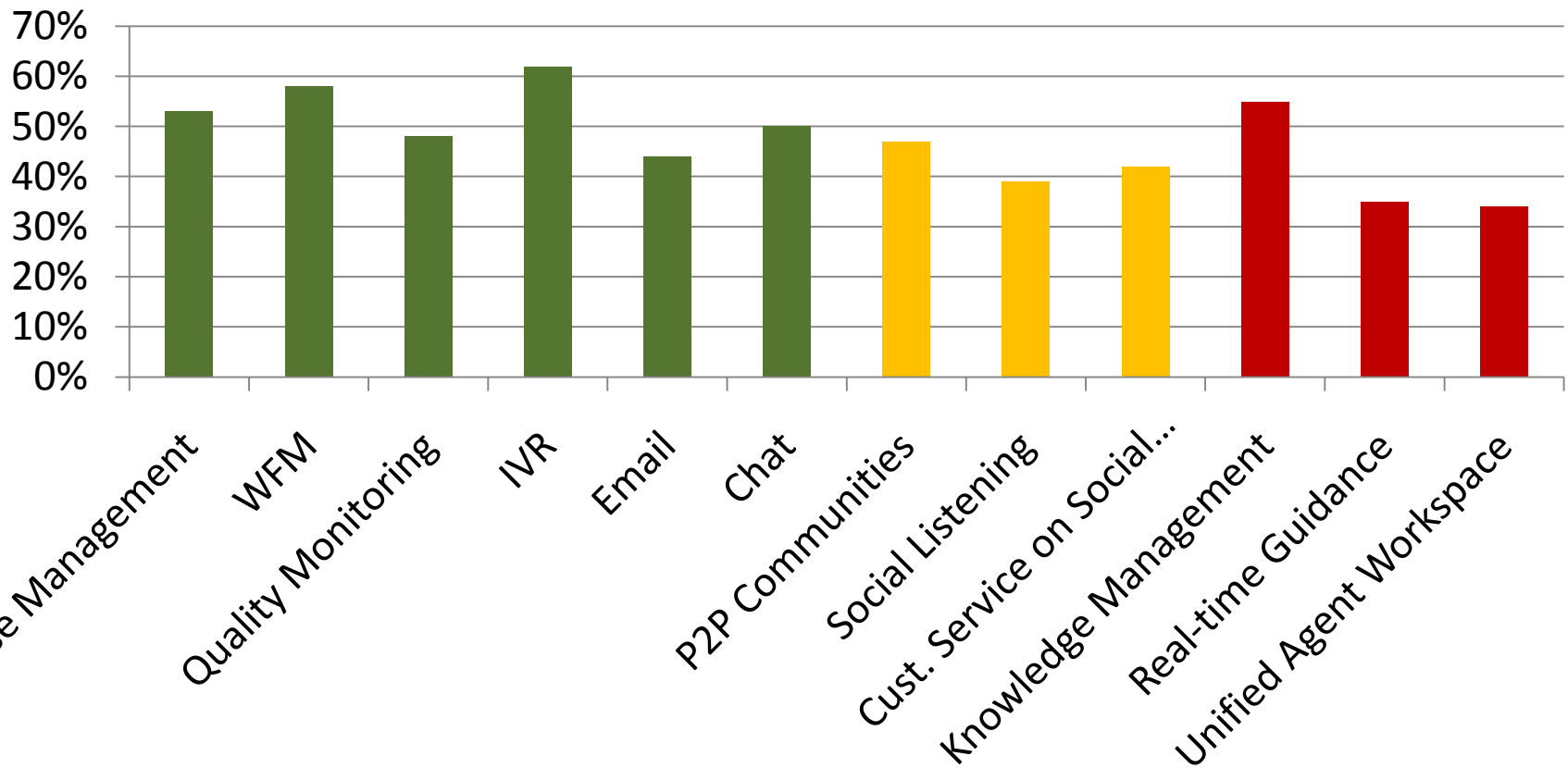


Legal

Why Clone Your Best Agents? | Industry Trends *Jacada*

Adoption of CS Technologies

Source: Forrester Research & CustomerThink.com, 2012 Q1

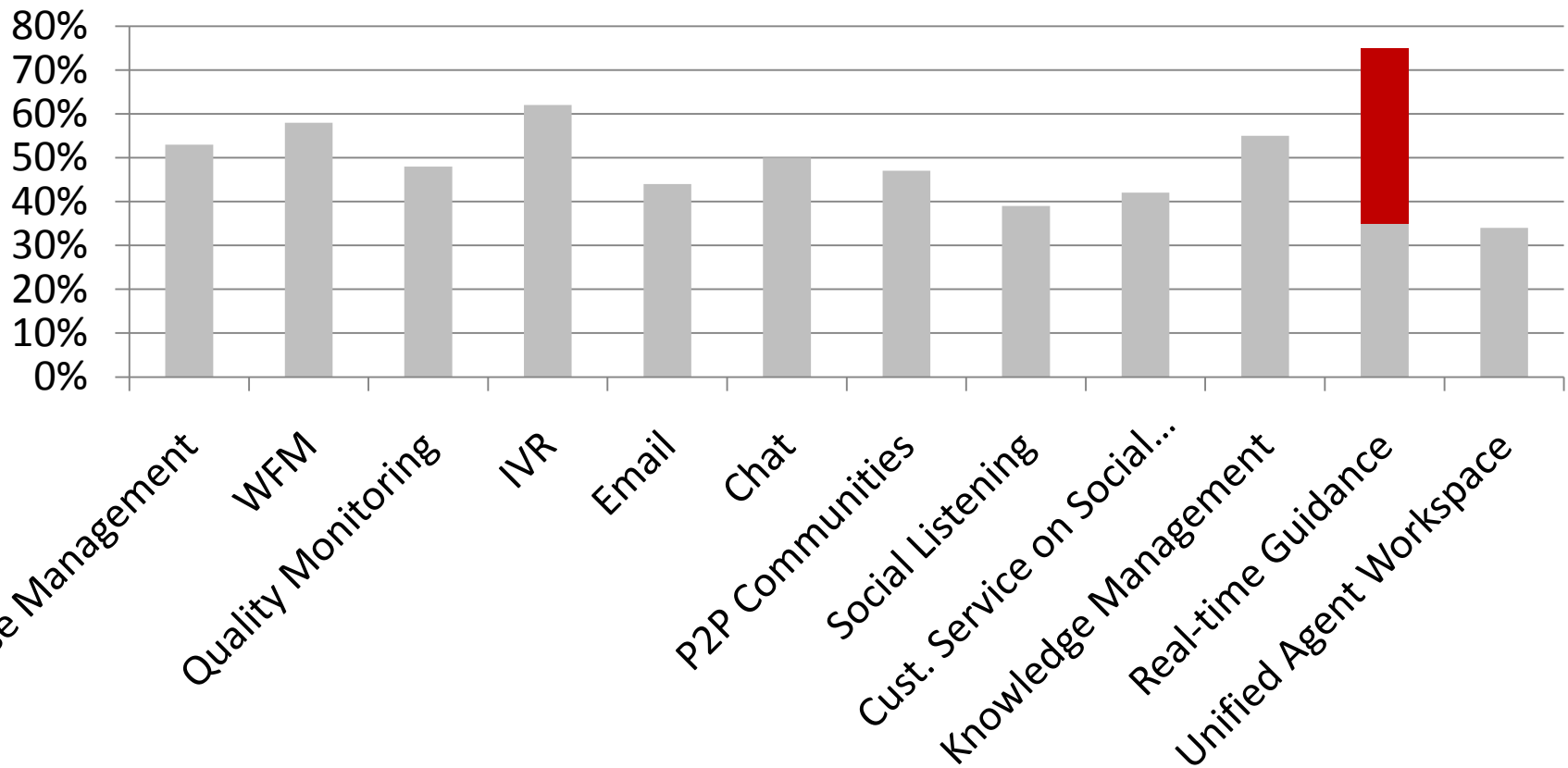


- Core Enablers / Must-Haves
- Social Technologies / Hype Cycle
- Personalized Customer Service Experience Enablers

Why Clone Your Best Agents? | Industry Trends *Jacada*

Adoption of CS Technologies

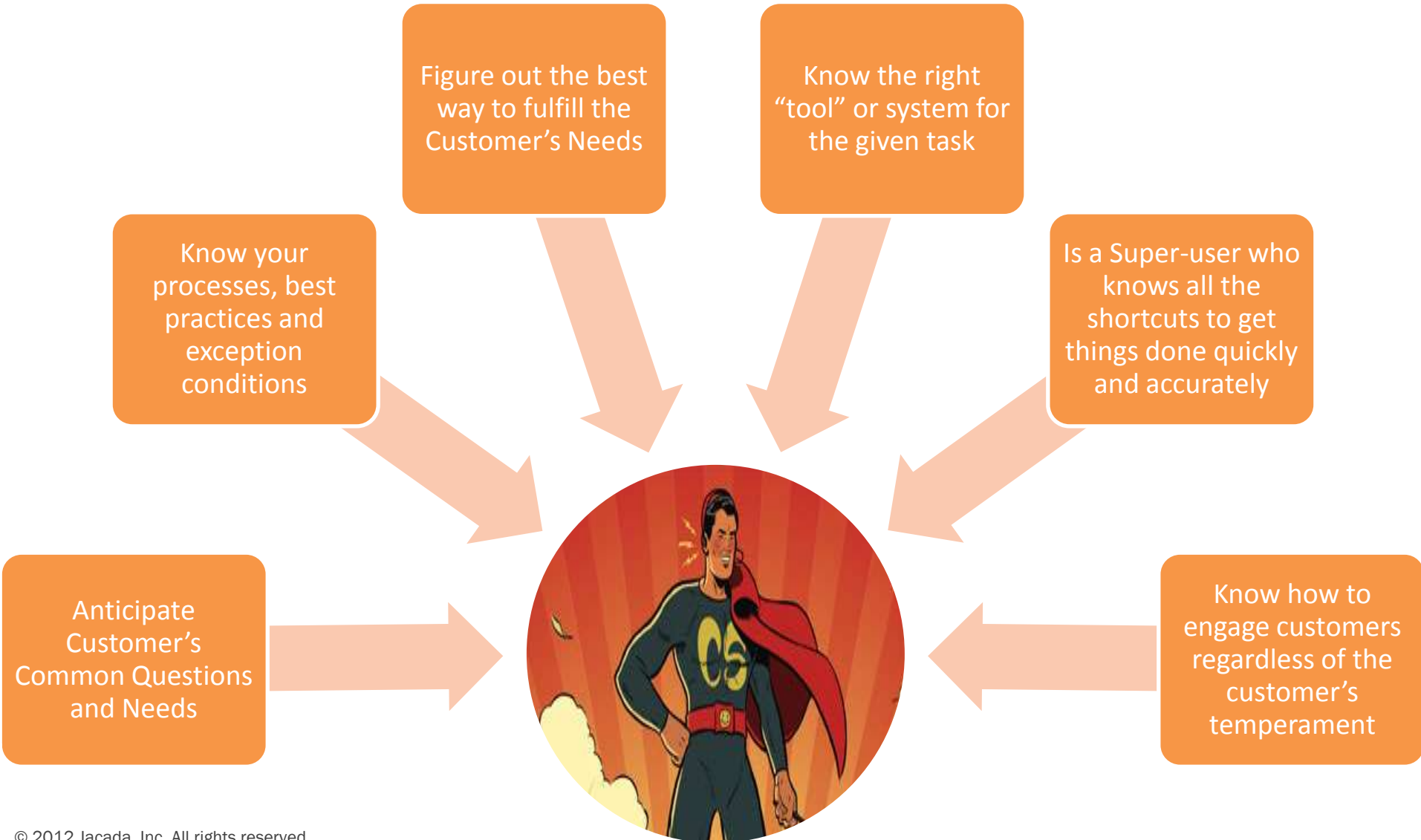
Source: Forrester Research & CustomerThink.com, 2012 Q1



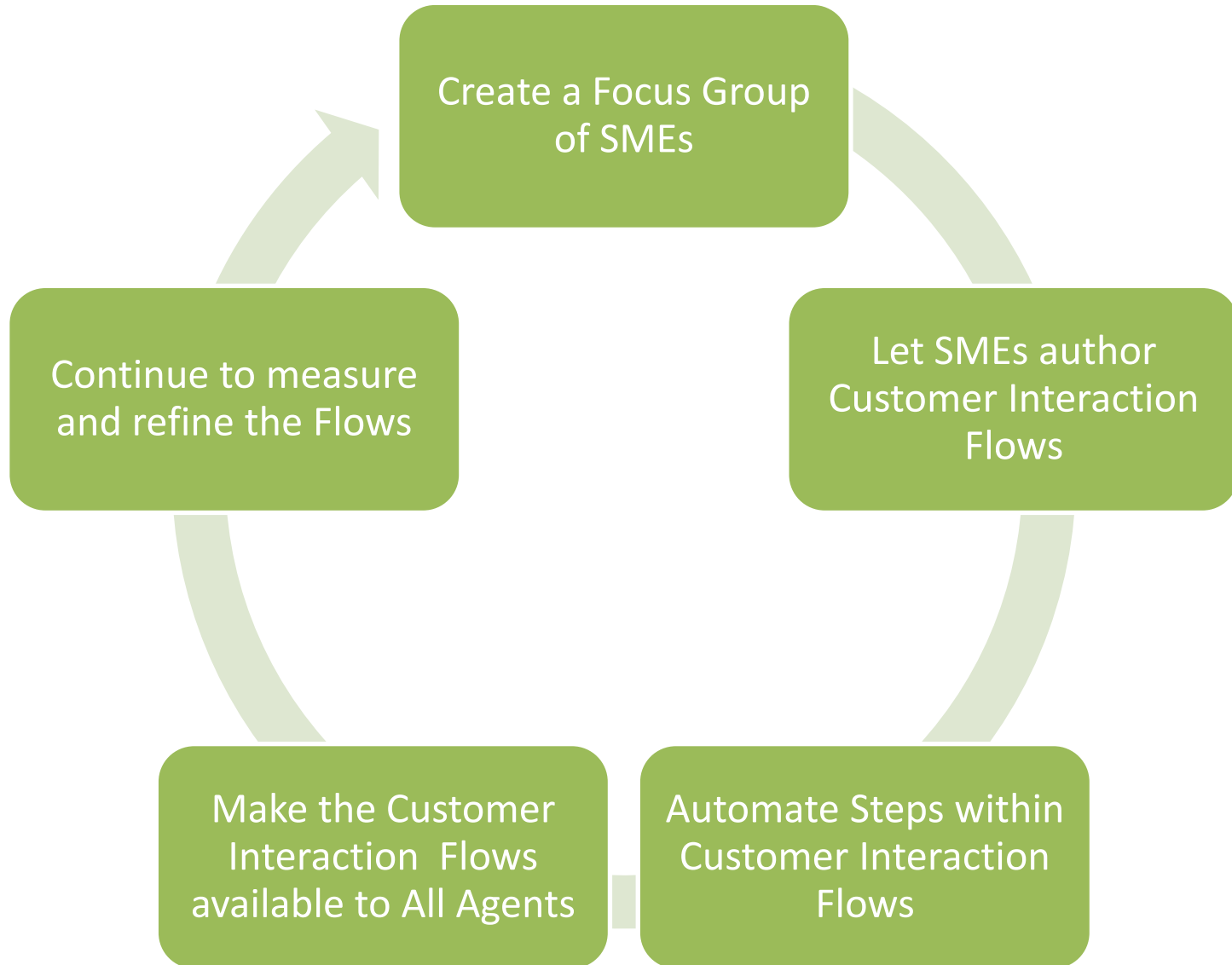
■ Current Adoption Level

■ Active Consideration

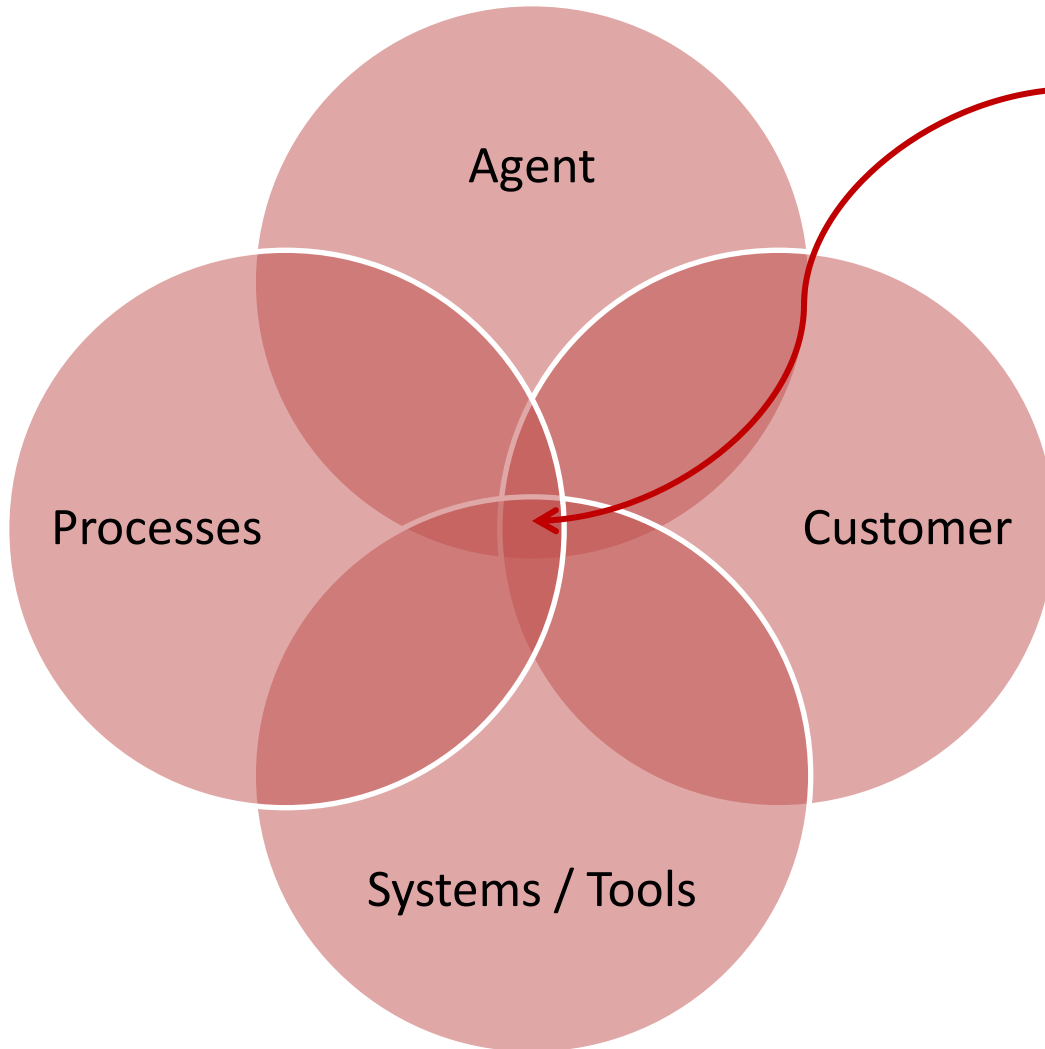
Your Best Agents | Why they stand out?



Clone Your Best Agents | A Framework *jacada*



Focus Group of SMEs



Customer Interactions happen here.

Your SMEs understand intuitively the complex relationships among these entities.

They need a framework in which they can express themselves effectively and monitor usage to improve customer interactions continuously.

SMEs Author Customer Interaction Flows



Interaction Manager (Evaluation License - 88 days left)

File Edit View Insert My Interaction Publish Options Help

Interaction 17: X: C:\Users\Andr...gdenR_v5.int

Interaction Map

Interaction Flow

Belastingdienst

AUTHORIZATION SUCCESSFUL!

Basic Customer Data

Social Security Number: 123456789
 Name: Clear
 First Name: Tom
 Street: 400 Perimeter Center Terrace
 City: Atlanta, GA 30346
 Phone: 770-352-1300
 Email: info@jacada.com
 Branch: M0SL544189

Account No.	Type	Balance	Avail. Bal.	Avg. B
678956554	Savings	568,57	568,57	898,22
876576878	Checking	890,76	890,76	5025,9
546771298	Loan	27415,83		

Proceed with the customer request.

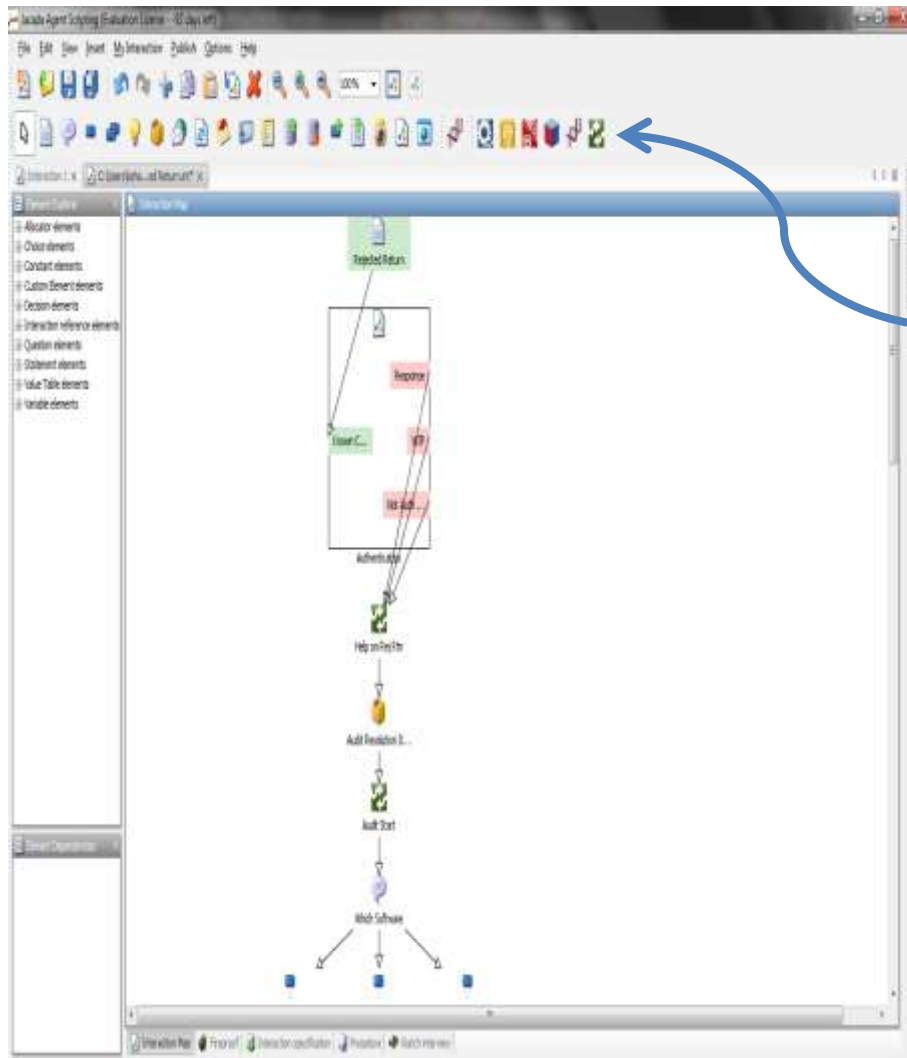
< Back Next > Finish

File Event

Interaction Help Audit

The screenshot displays the Interaction Manager software interface. On the left, a 'General Elements' list includes various components like Allocators, Choices, Constants, Custom Elements, Custom WebPages, Data lookups, Database connections, Decision elements, Questions, Resources, Statements, Value Tables, and Variables. The main area shows an 'Interaction Map' flowchart starting with an 'Interaction' node, branching into 'Information', 'Savings', 'Checking', and 'Loans'. The 'Checking' path leads to 'setTask', 'setSec', 'Host_Authentic...', 'CustomerData', 'CustomerLookup', 'CustomerAuth...', 'Authorized', and 'CustomerAuth...'. The 'Information' path leads to 'setTaskInfo', 'KnowledgeBase', 'setSecSet', and 'Host_Authentic...'. The 'Loans' path leads to 'Host_Authentic...'. The 'Authorized' node leads to 'AuthorizedReply' and 'HostAuthorized', which both lead to 'CustomerAuth...'. The 'CustomerAuth...' node is highlighted in yellow. On the right, a preview window shows a user interface for 'Belastingdienst' with a green 'AUTHORIZATION SUCCESSFUL!' message, a table of customer data, and a yellow 'Proceed with the customer request.' message. Navigation buttons for '< Back', 'Next >', and 'Finish' are visible, along with a 'File Event' button at the bottom.

Automate Steps in Customer Interaction Flows



- Look up Customer Info



- Update Case Details



- Search Knowledge Base



- Trigger Back-office Workflow

- Copy-Paste Data between Apps

- Auto Document Customer Interaction

AHT

FCR

Training

\$\$\$

Make Flow Available to All Agents



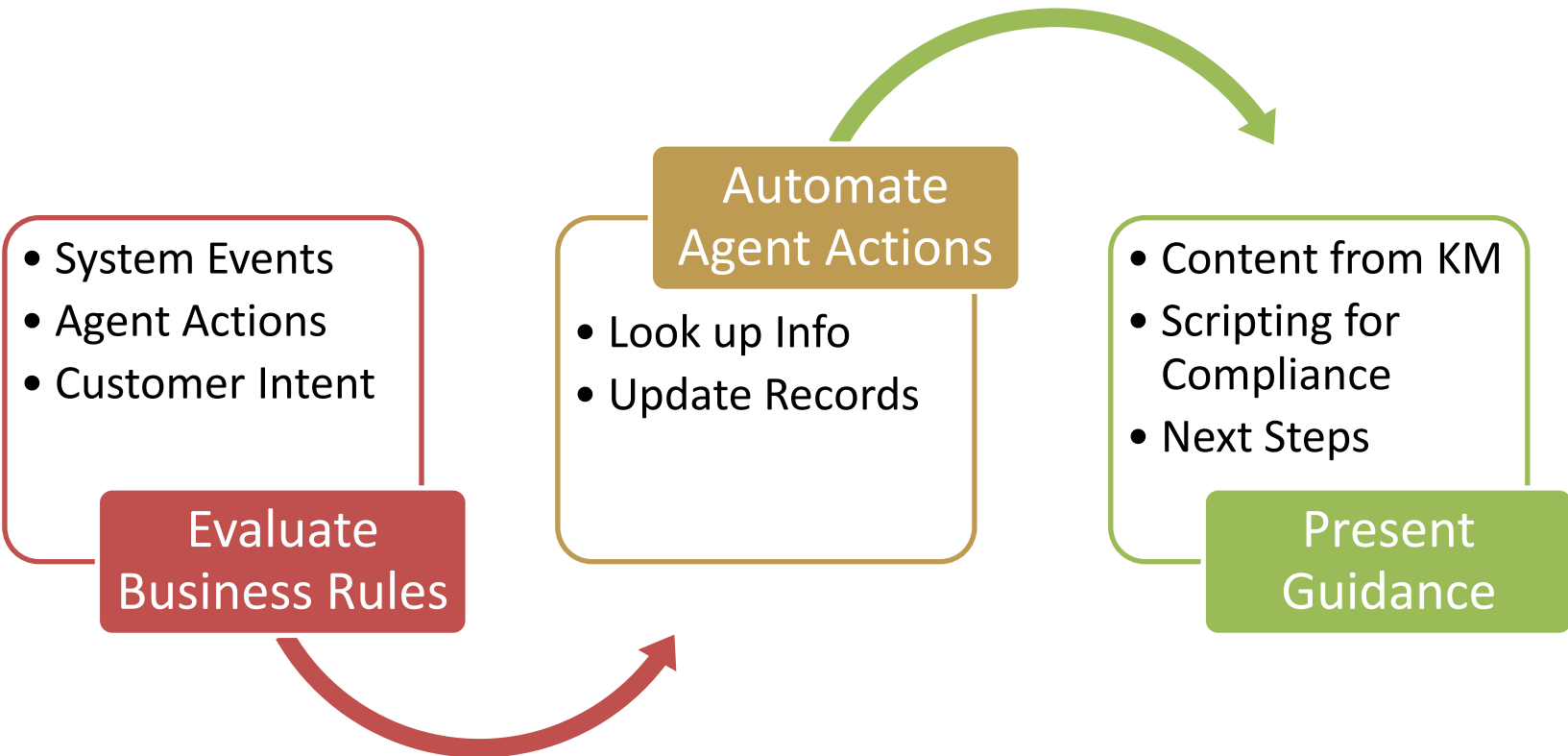
Publish
Interaction

Awaiting
Approval

Approved



User Experience | Proactive Guidance



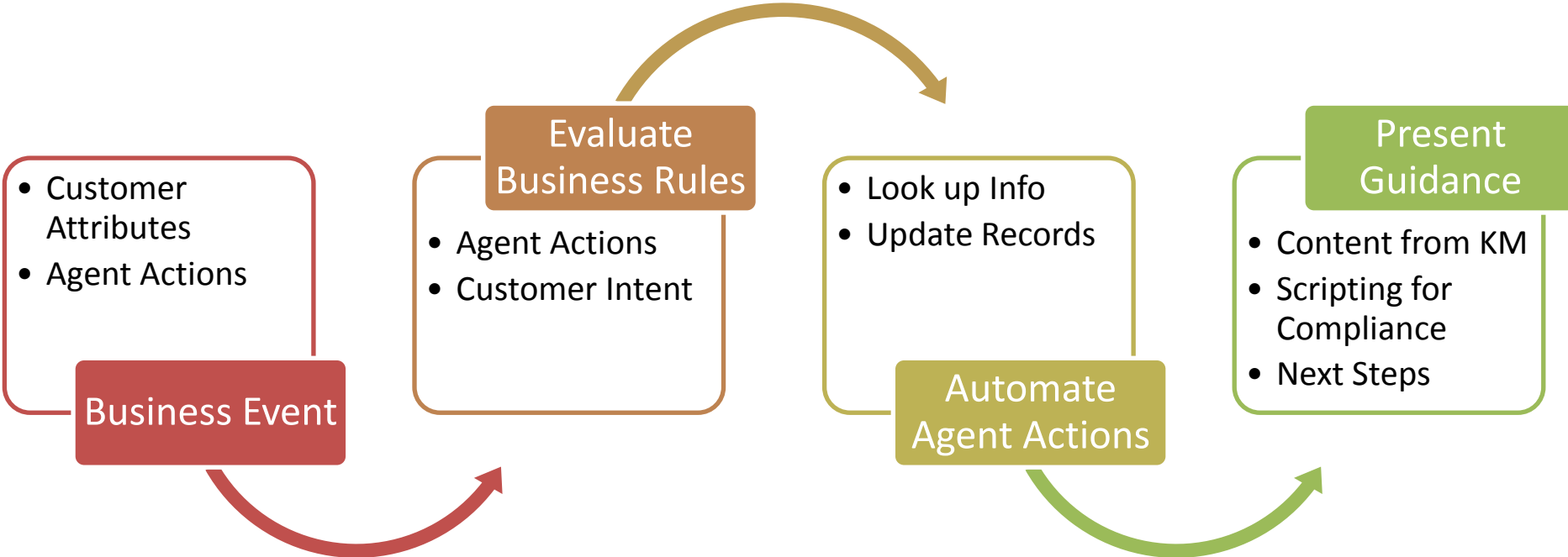
AHT

FCR

Training

\$\$\$

User Experience | Reactive Guidance



AHT

FCR

Training

\$\$\$

User Experience | “Authentic” Interactions



Process owner defines the experience

Greet Caller & Identify Customer

Caller Authentication

Mary Loehman, to protect the security of your account, I am required to ask for some of your account information.

Authenticate the caller by asking any three of the following questions.

May I please have the last four digits of your social security number?

SSN: ****-**-6789 Not Verified

What is your Date of Birth?

Date of Birth: 01/01/1979 Not Verified

What is your Mother's Maiden Name?

Mother's Maiden Name: Smith Not Verified

How many accounts do you have with Alpine Bank?

No. of Accounts with Alpine Bank: 3 Not Verified

Do you know the balance on your checking account?

Checking Account Balance: \$12,345.00 Not Verified

next

Authentication Procedures

Why Authenticate?

Authentication Procedures

To comply with Company Guidelines all callers must be Authenticated on a minimum of the three of the following security questions:

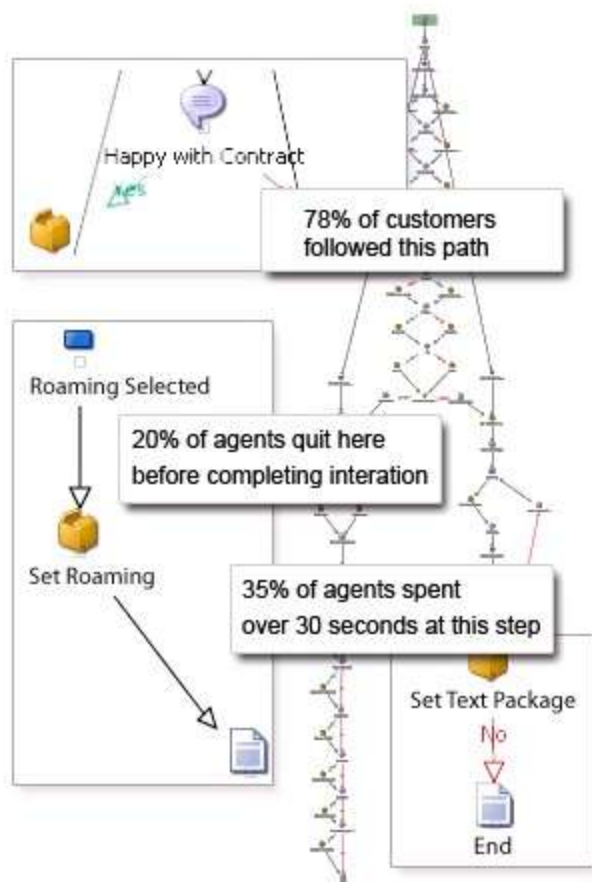
- Social Security Number (Last four digits)
- Date of Birth
- Mother's Maiden Name
- Number of Accounts at Alpine Bank
- Current Balance for Checking Account

Real-time Guidance from multiple content repositories

CSR leverages dynamic content to handle customer questions & objections

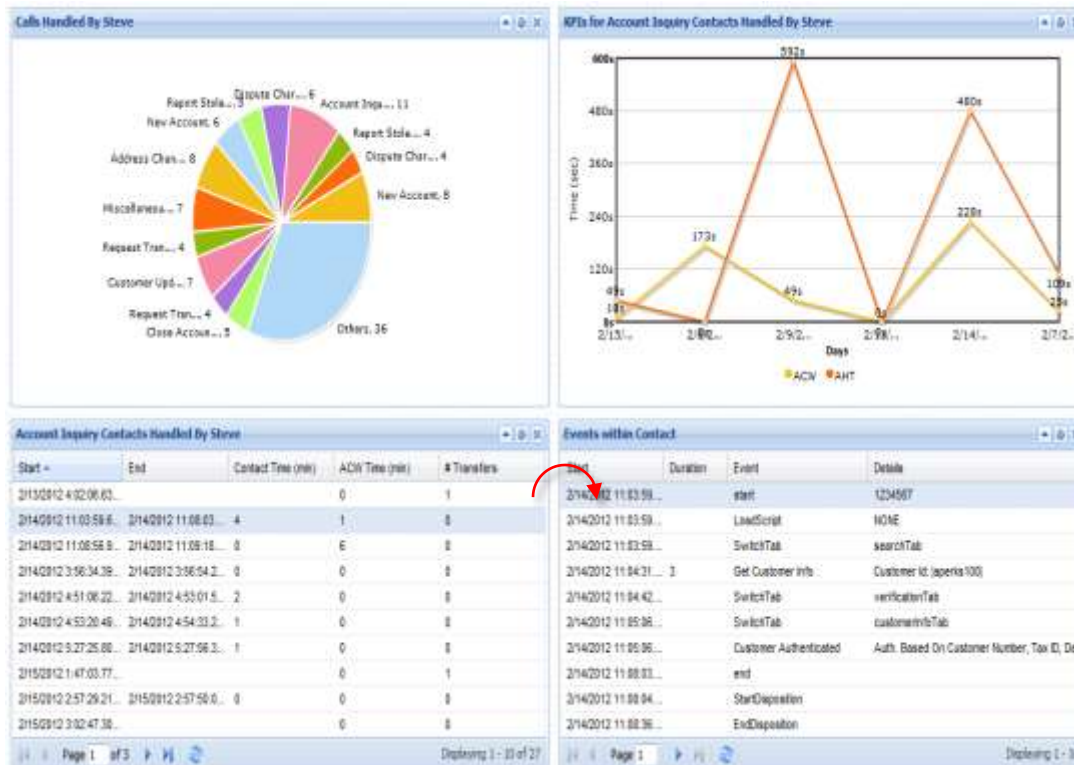
Scripting with “live” access to applications

Measure & Refine the Flows



Test Your Tribal Knowledge

- Granular Auditing & Reporting
- Identify Interaction Bottlenecks and Hot Spots
- Revise Flows and Publish in real-time



Clone Your Best Agents | Dos & Don'ts



Best Practices

- Take a process-centric approach with cross-functional reality checks
- Enable a Focus Group of SMEs to design goal-state Customer Interaction Flows
- Identify opportunities to automate manual agent tasks to drive efficiencies
- Monitor Usage and Improve continuously

Pitfalls

- Misalignment between strategic drivers and tribal knowledge
- Rigid Interaction Flow that detracts from an authentic experience

Cloning Your Best Agents | Experience It!



Leading European Communications Service Provider

FCR

- 50% Less Transfers
- 25% Less Repeat Calls

Training

- 40% Reduction (2 weeks)

AHT

- 40 second Reduction





Thank You

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