How many customer service representatives (CSRs) does your organization have?

Category	Percentage
Under 500	33.33%
500 - 2,500	28.21%
2,500 - 5,000	7.69%
5,000 - 10,000	14.10%
Over 10,000	16.67%
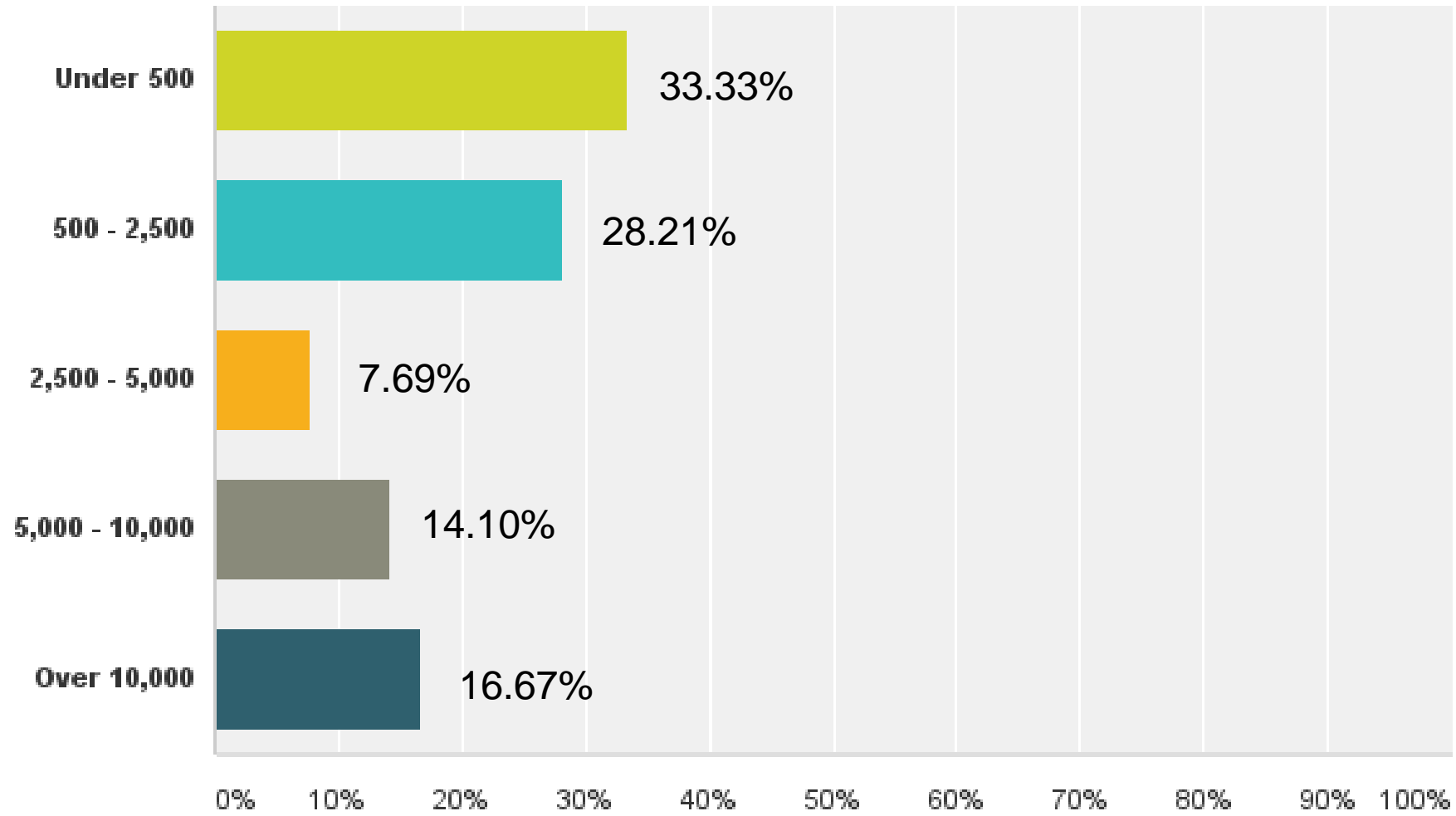
How many applications do you currently have running on your customer service/call center desktop?
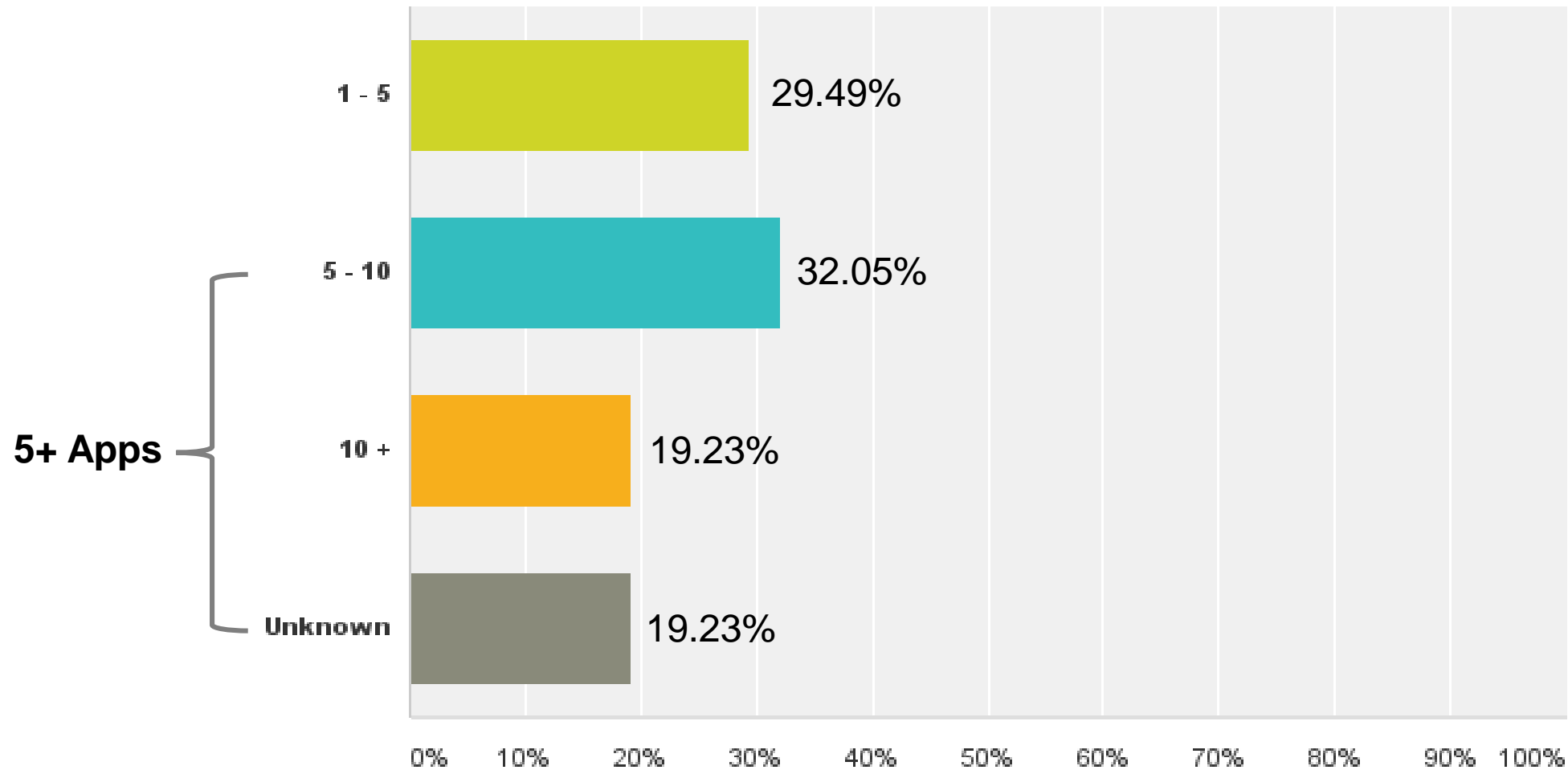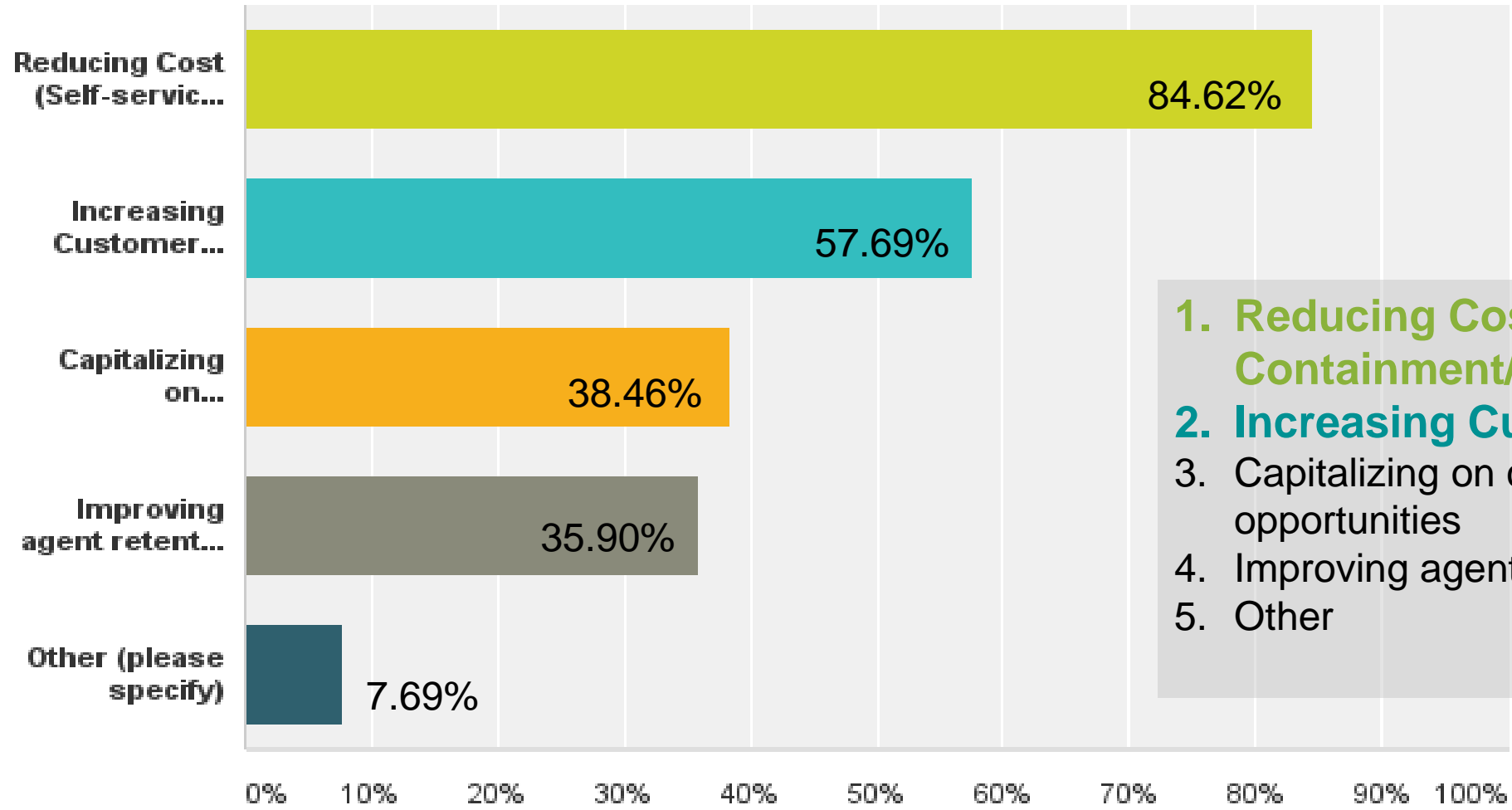
1 - 5 — 29.49%
5 - 10 — 32.05%
10 + — 19.23%
Unknown — 19.23%

5+ Apps

What are your top priorities around Customer Service in 2017?

| Priority	Percentage
Reducing Cost (Self-servic...	84.62%
Increasing Customer...	57.69%
Capitalizing on...	38.46%
Improving agent retent...	35.90%
Other (please specify)	7.69%

1. **Reducing Cost (Self Service/Call Containment/Avoidance)**
2. **Increasing Customer Retention**
3. Capitalizing on cross-sell/upsell opportunities
4. Improving agent retention rates
5. Other

Robotic Automation Trends

Does your organization use Robotic Automation (RA) today?
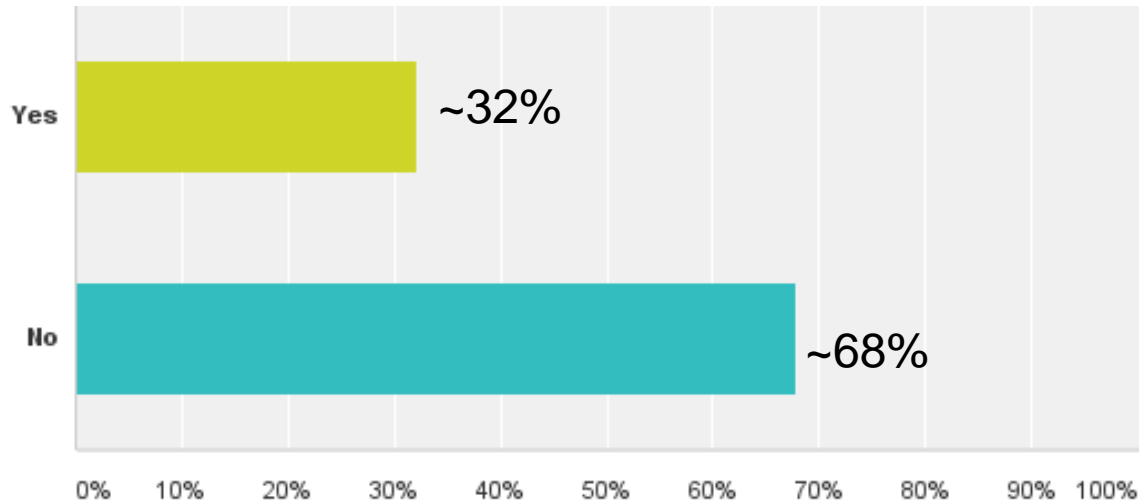
Does your organization have plans to start using RA?
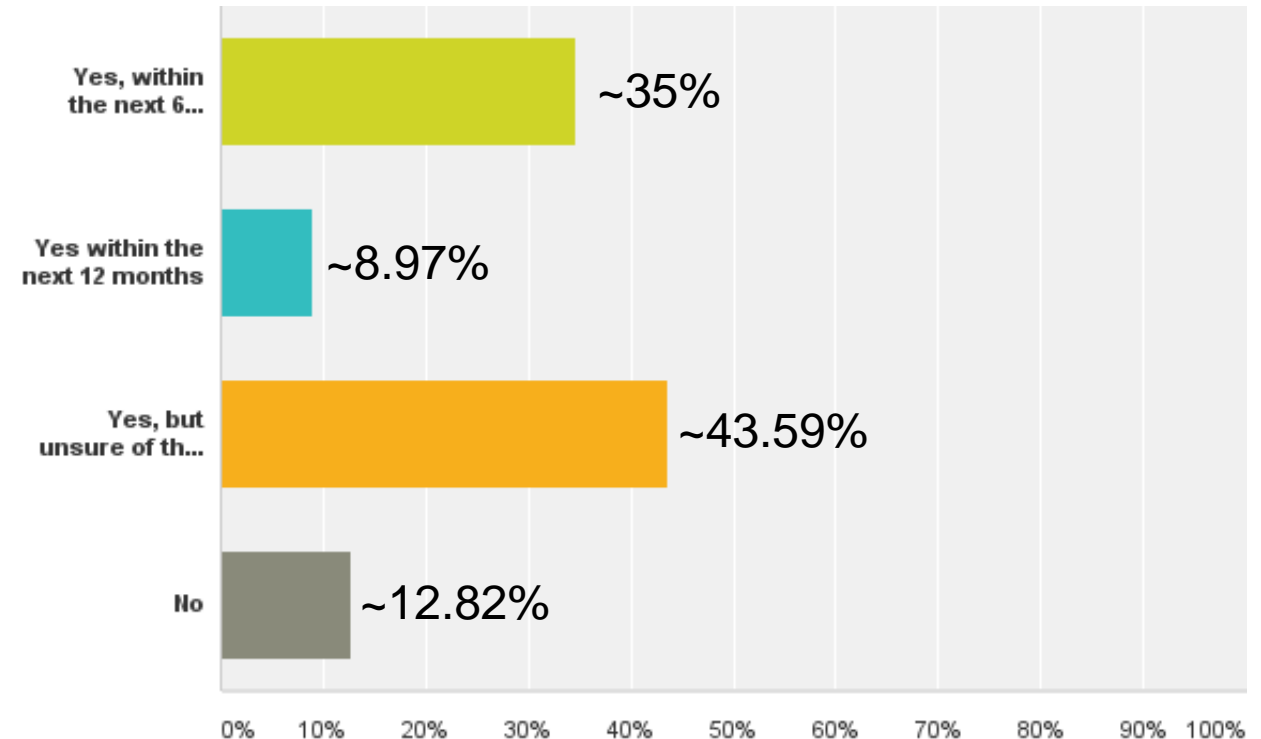
Don't Hit the Wall of Productivity
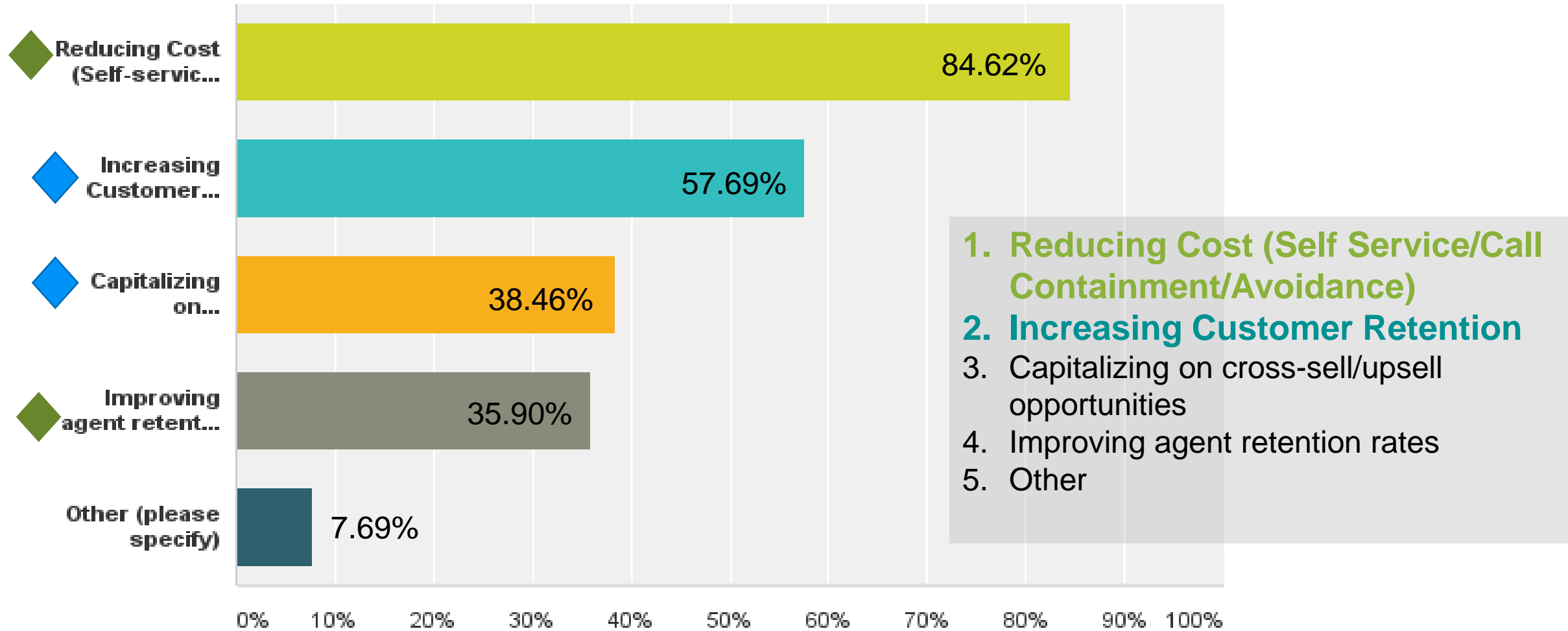
Start with the Destination

You CAN achieve both goals!

What are your top priorities around Customer Service in 2017?

Priority	Percentage
Reducing Cost (Self-servic...	84.62%
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1. **Reducing Cost (Self Service/Call Containment/Avoidance)**
2. **Increasing Customer Retention**
3. Capitalizing on cross-sell/upsell opportunities
4. Improving agent retention rates
5. Other

A **Digital** Transformation of Customer Service Strategy

Detect service needs *as* they happen and engage

Trigger

Empower customers

Self-serve

Reduce volume & duration of calls

IVR

App, SMS, Email, T2V

Web, Mobile, Virt. Asst.

Phone

Preemptive Service

Moment of Need

Proactive Service

Responsive Service

?

Chat, FB Messenger, Twitter, SMS, Video

Email

App, SMS, Email, T2V

Assisted

Handle calls most effectively

Anticipate needs and events *before* they become service events

Trigger

Offline

Accelerate resolution

Reduce propensity to call

Contain and deflect

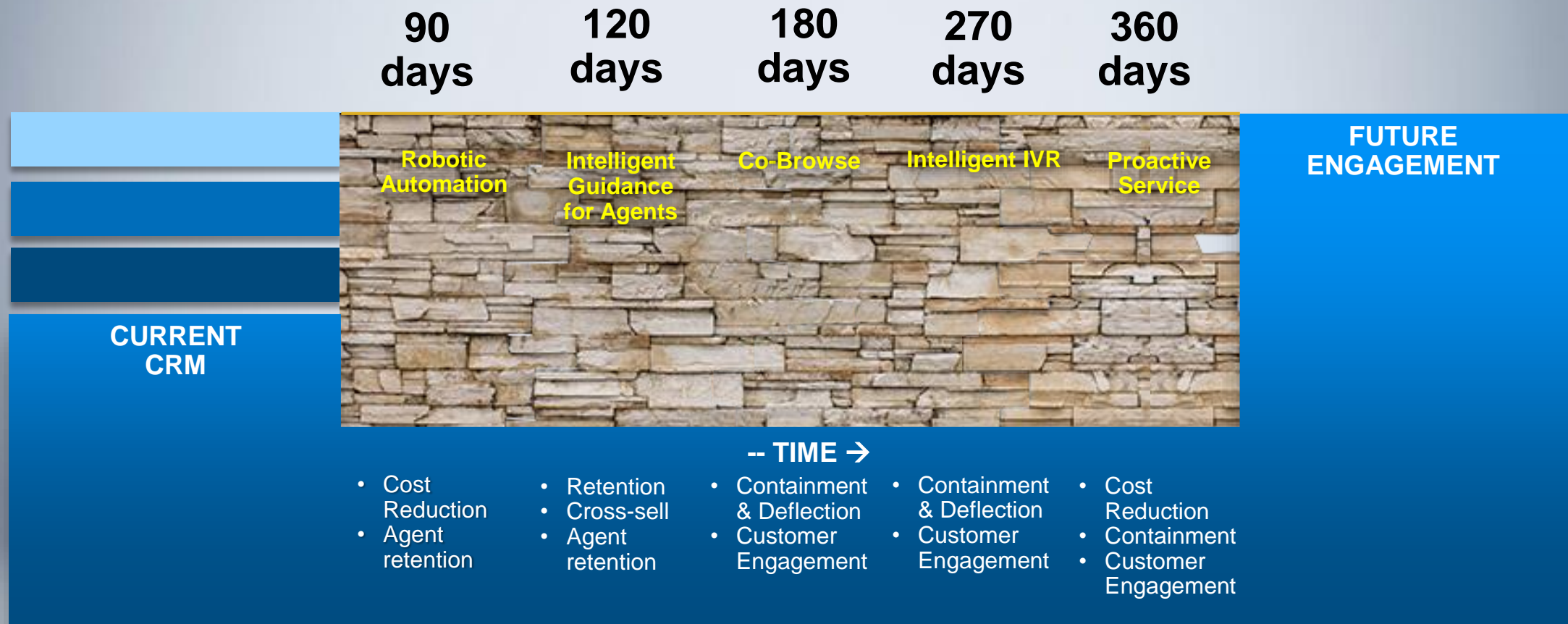**Improve efficacy of live interaction**

Pega

The Power of Proactive Customer Service Strategy

- "Right now we're able to **predict** with a certain level of confidence that **you're going to call us** and so what's really nice about that is we have basically a 24-hour window from there to stop the call, to be able to **enable you to be self-service** or to **provide you a resolution path <u>before</u> you need to actually contact us**."

  - PayPal, PegaWorld 2016

Crossing your CRM Chasm

	90 days	120 days	180 days	270 days	360 days	
	Robotic Automation	Intelligent Guidance for Agents	Co-Browse	Intelligent IVR	Proactive Service	FUTURE ENGAGEMENT

CURRENT CRM

-- TIME →

- Cost Reduction
- Agent retention

- Retention
- Cross-sell
- Agent retention

- Containment & Deflection
- Customer Engagement

- Containment & Deflection
- Customer Engagement

- Cost Reduction
- Containment
- Customer Engagement

- 10% reduction in churn
- Lowest rate in history

Today's Desktop …

What Can I Automate?

Algorithmic *(computer)*

Matching Values

Computation

Data Entry

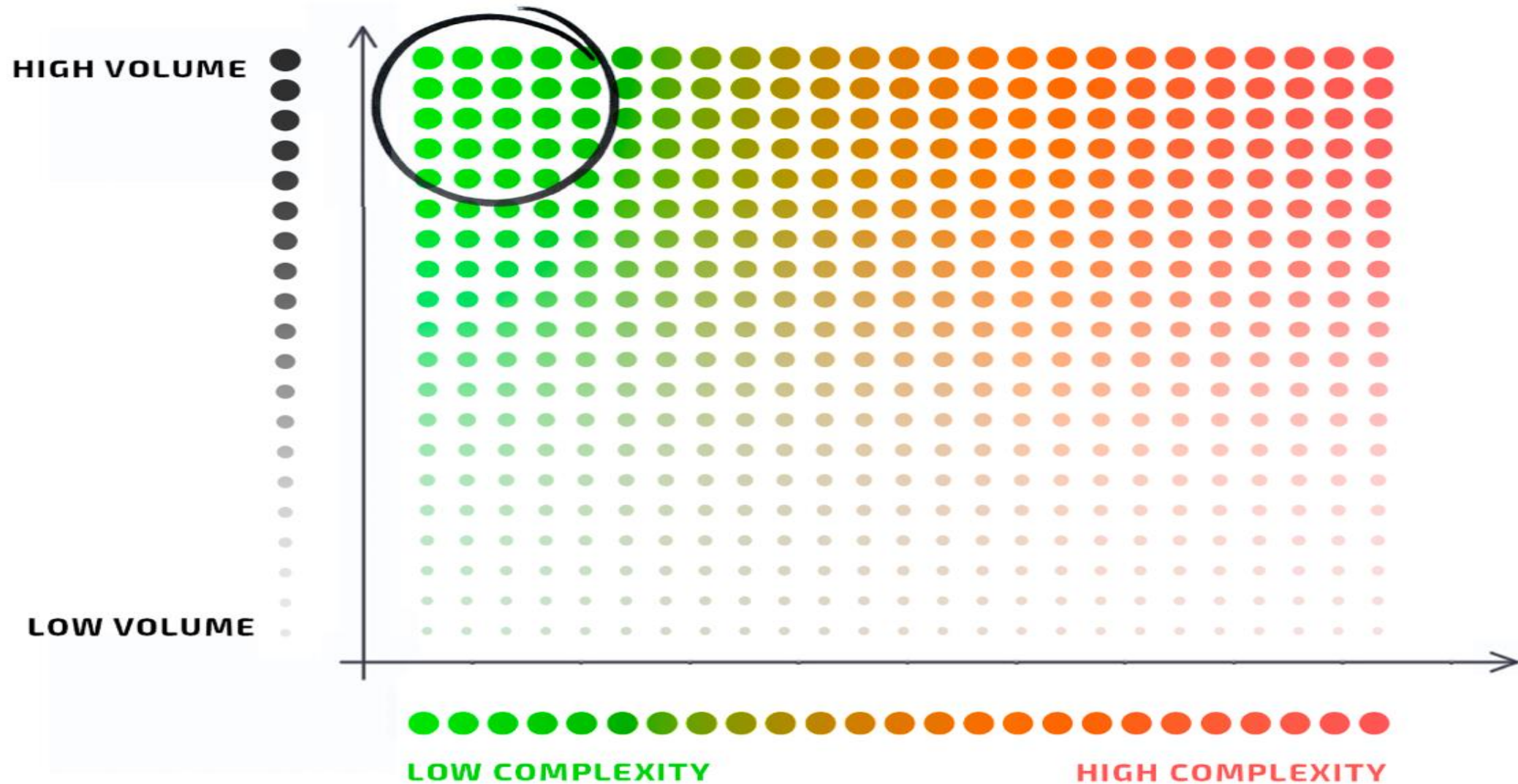Pattern Recognition

Heuristic *(human)*

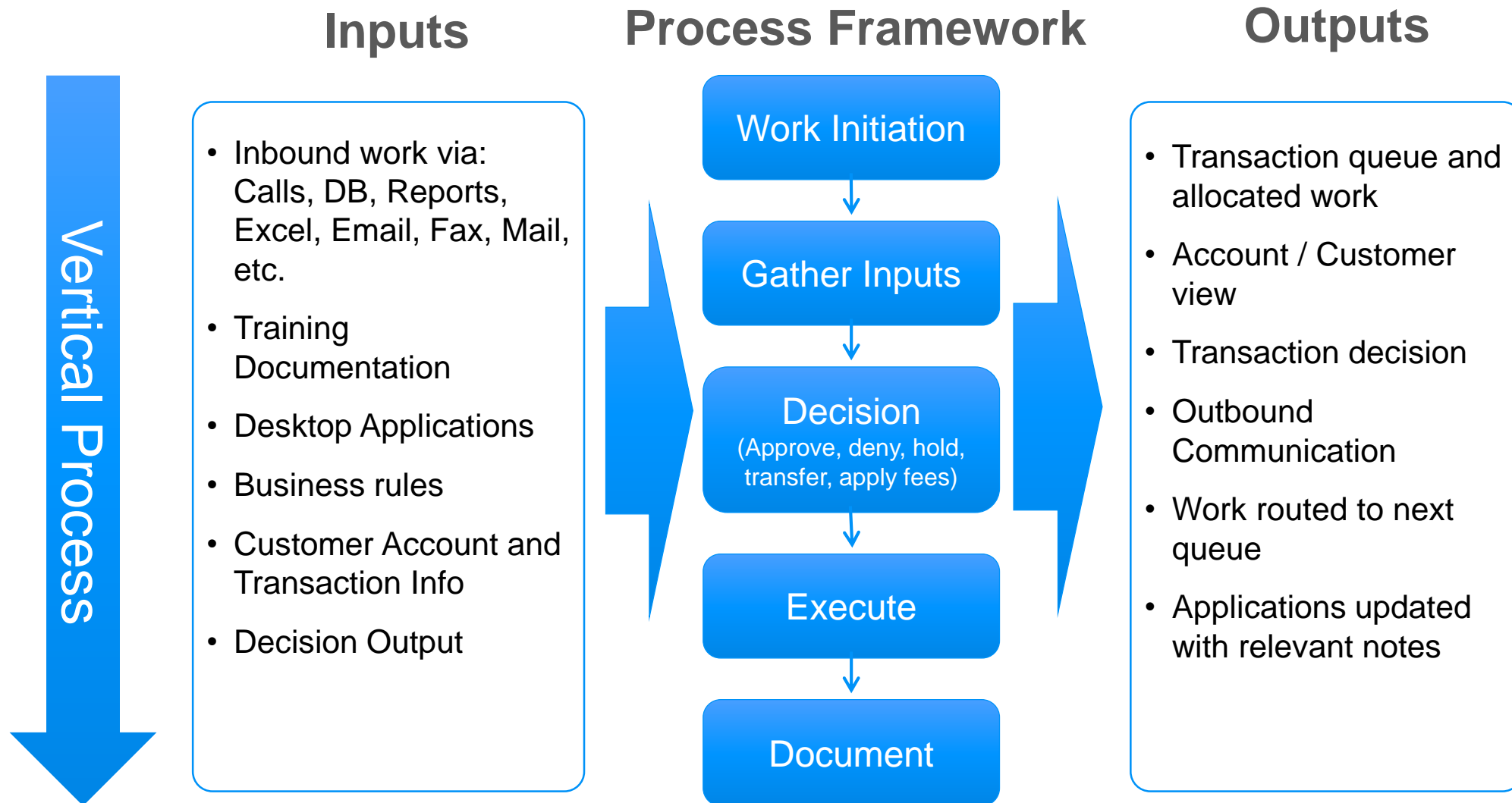Conversing with People

Reviews and Approvals

Interpreting an Image
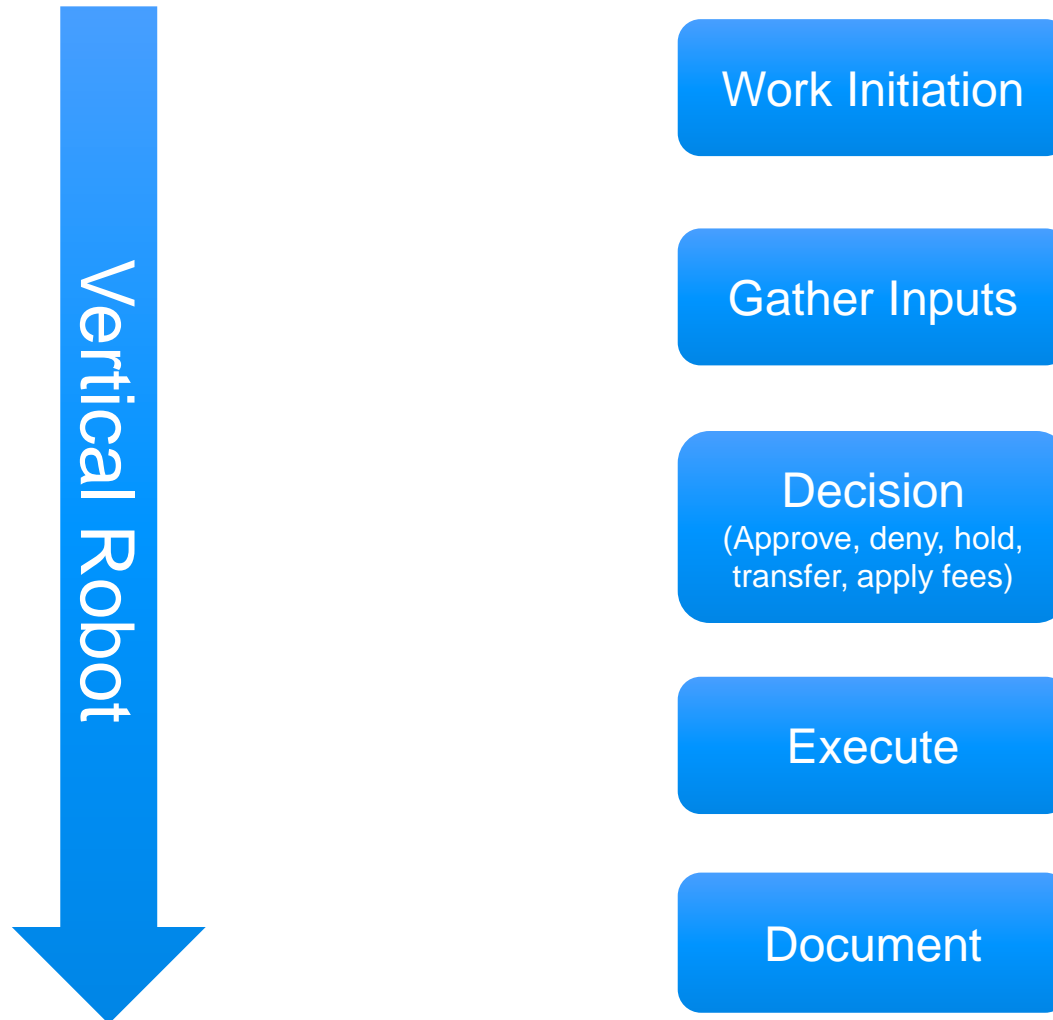
Interpreting Free Form Text

Where to target Automations

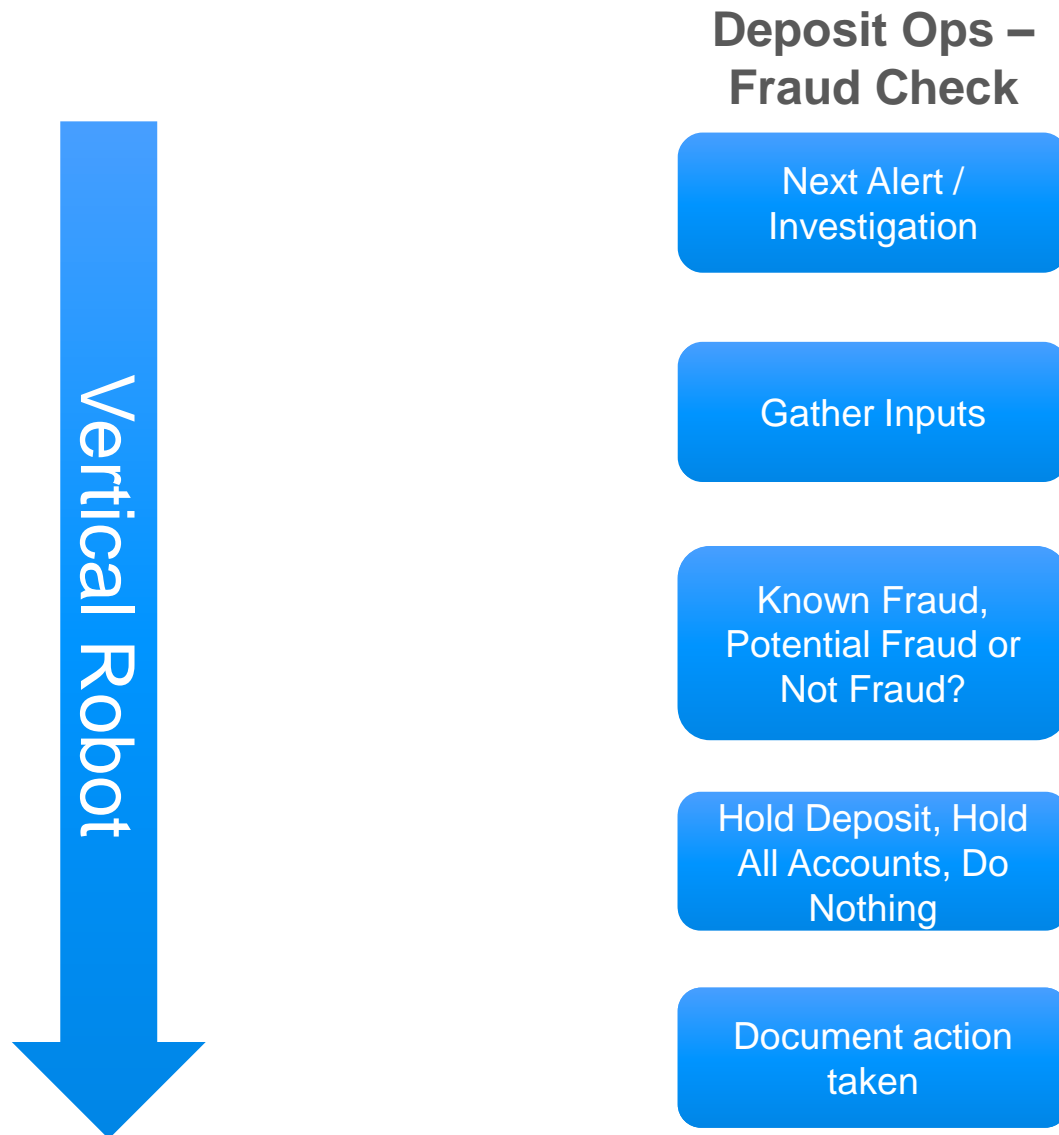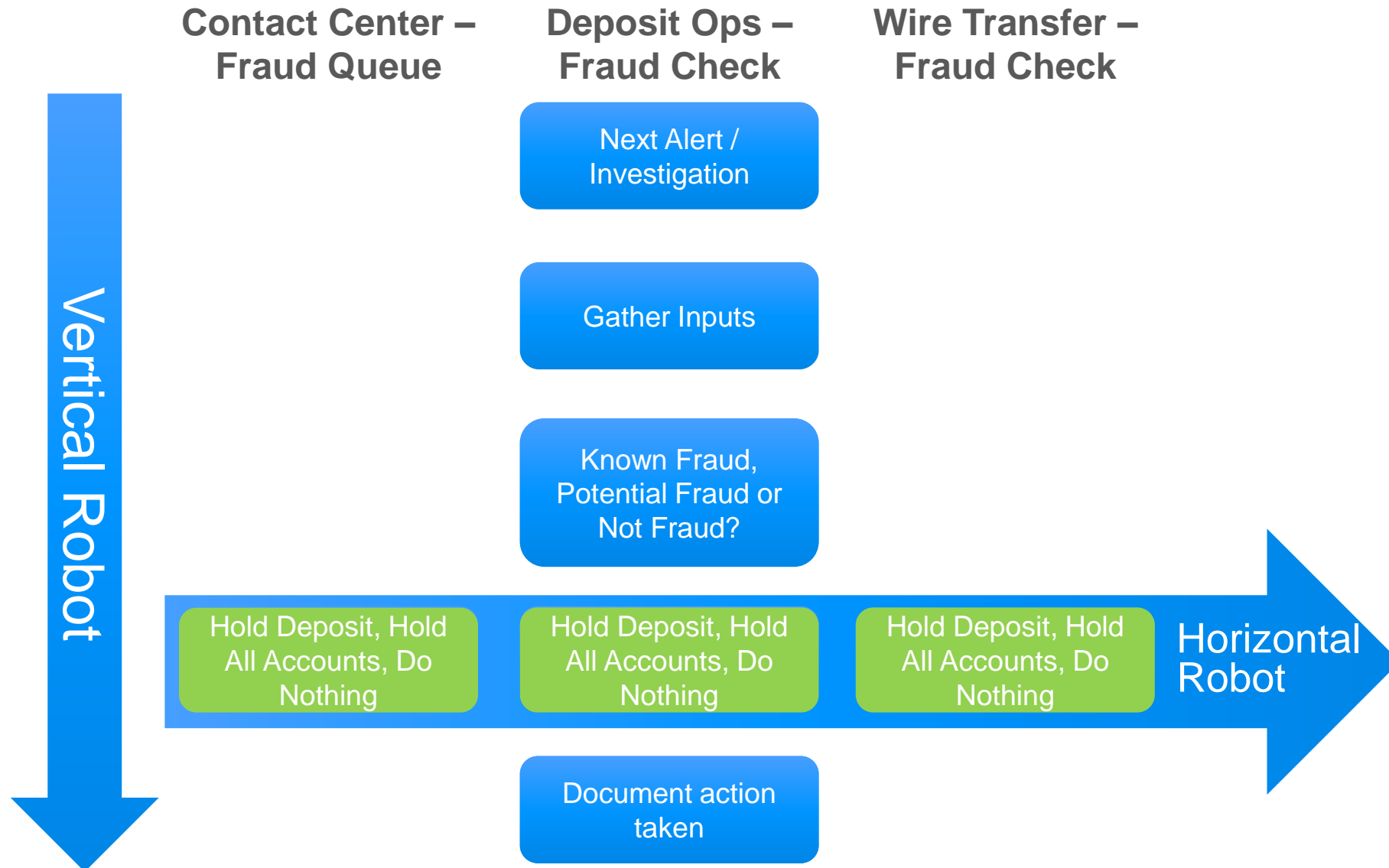# Finding Robotic Automation Opportunities

Inputs

- Inbound work via: Calls, DB, Reports, Excel, Email, Fax, Mail, etc.
- Training Documentation
- Desktop Applications
- Business rules
- Customer Account and Transaction Info
- Decision Output

Process Framework

Work Initiation

↓

Gather Inputs

↓

Decision
(Approve, deny, hold, transfer, apply fees)

↓

Execute

↓

Document

Outputs

- Transaction queue and allocated work
- Account / Customer view
- Transaction decision
- Outbound Communication
- Work routed to next queue
- Applications updated with relevant notes

Vertical Process

Finding the Vertical Opportunities

Vertical Robot

Work Initiation

Gather Inputs

Decision
(Approve, deny, hold, transfer, apply fees)

Execute

Document

= Full Automation   = Partial Automation   = Manual Steps

Finding the Vertical Opportunities – Fraud Example

Deposit Ops – Fraud Check

Vertical Robot

Next Alert / Investigation

Gather Inputs

Known Fraud, Potential Fraud or Not Fraud?

Hold Deposit, Hold All Accounts, Do Nothing

Document action taken

= *Full Automation*   = *Partial Automation*   = *Manual Steps*

Finding the Horizontal Opportunities – Fraud Example

Contact Center – Fraud Queue

Deposit Ops – Fraud Check

Wire Transfer – Fraud Check

Vertical Robot

Next Alert / Investigation

Gather Inputs

Known Fraud, Potential Fraud or Not Fraud?

Hold Deposit, Hold All Accounts, Do Nothing

Hold Deposit, Hold All Accounts, Do Nothing

Hold Deposit, Hold All Accounts, Do Nothing

Horizontal Robot

Document action taken

= Full Automation   = Partial Automation   = Manual Steps

Finding the Horizontal Opportunities – Fraud Example

	Contact Center – Fraud Queue	Deposit Ops – Fraud Check	Wire Transfer – Fraud Check
Vertical Robot	Work Initiation	Next Alert / Investigation	Work Initiation
	Gather Inputs	Gather Inputs	Gather Inputs
	Make a decision / Provide Info	Known Fraud, Potential Fraud or Not Fraud?	Known Fraud, Potential Fraud or Not Fraud?
	Hold Deposit, Hold All Accounts, Do Nothing	Hold Deposit, Hold All Accounts, Do Nothing	Hold Deposit, Hold All Accounts, Do Nothing
	Document	Document action taken	Document

Horizontal Robot

= Full Automation   = Partial Automation   = Manual Steps

Finding the Horizontal Opportunities – Fraud Example

	Contact Center – Fraud Queue	Deposit Ops – Fraud Check	Wire Transfer – Fraud Check
	Work Initiation	Next Alert / Investigation	Work Initiation
Vertical Robot	Gather Inputs	Gather Inputs	Gather Inputs
	Make Decision / Provide Info	Known Fraud, Potential Fraud or Not Fraud?	Known Fraud, Potential Fraud or Not Fraud?
	Hold Deposit, Hold All Accounts, Do Nothing	Hold Deposit, Hold All Accounts, Do Nothing	Hold Deposit, Hold All Accounts, Do Nothing
	Document	Document	Document

Horizontal Robot

= Full Automation   = Partial Automation   = Manual Steps

Common Use Cases in the call center
(Rapid ROI: Optimize existing desktop workflows and applications)

Desktop Assistant

Enabling user readiness: Launch in Context, Customer 360 View, Alerts, Offers

Streamline activity completion: Auto-notes

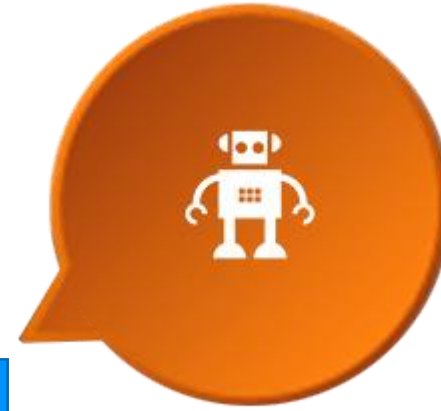**Process Accelerators / Guidance:** "Click and go"

What Now?
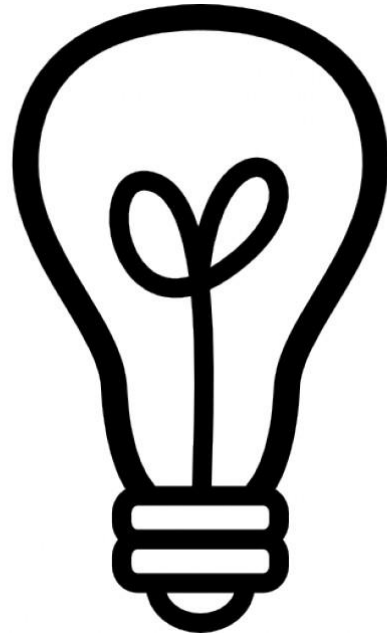
Enterprise Robotics – One technology stack for all use cases

Advise
Artificial Intelligence focused on decisions

Replace
Replace Workers RPA – Robots executing end-to-end processes

Assist
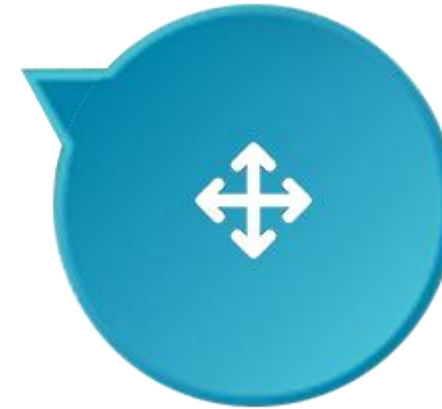*Assist Workers RDA – Robots assisting workers*

Extend
Extend applications Service enablement Robots providing API

Customer Service

Key Take Aways

- **Digital Transformation is a Journey not Destination**
  – Not a one time event
  – Big gains: "wrapping & renewing"

- **Seek "Quick Wins" for your Business**
  – Rapid value to business (Simple + High Volume)
  – Long term benefits that carry forward to future state
  – Both efficiency (cost) and engagement (revenue)

QUESTIONS