

Beyond the call center: Moving to the AI-powered customer engagement center

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The world of service keeps accelerating

But at its core, it all comes down to one thing: Addressing your customers' moment of need. And above all else, that means delivering fast and efficient service to resolve that need.

Customers want quick resolutions. And as they switch to new digital channels, delivering connected, consistent experiences has become a key goal for customer service teams.

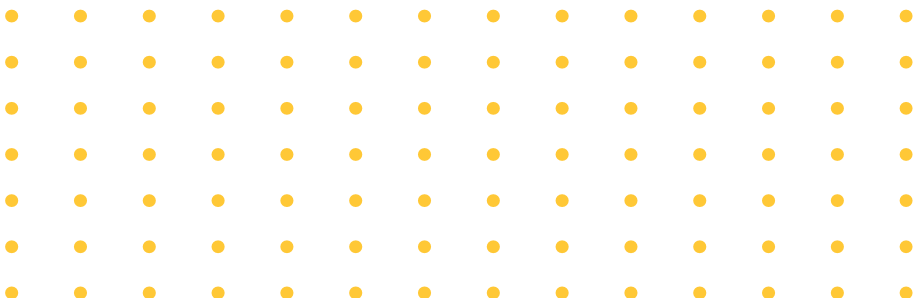
To meet customers where they are and manage inquiries coming from all directions – such as web chat, mobile apps, social media, and SMS – organizations have expanded beyond the traditional phone-based call center. The new, modern-day contact center supports newer business models and digital channels that require greater immediacy.

For many organizations, however, the mission of providing this type of omni-channel experience can pose a challenge. With so many different channels to manage, the overall service experience can become more disconnected and complex for your agents, IT teams, and customers. Remediating this and facilitating truly customer-centric service requires a new way of thinking. **Many organizations are adopting new scalable strategies and technologies that help simplify service and provide seamless experiences across the contact center.**

The reinvention of the contact center

Since their inception, call centers have existed to provide better support to customers. They made it easier for customers to receive service by creating a centralized resource where customers could go to get help and answers. Many businesses' ultimate goal is to reduce the amount of time between a customer's moment of need and the resolution of their inquiry.

However, for the longest time, all roads seemed to lead to the phone. Traditionally, many organizations focused primarily on making their call centers more efficient, relying on key metrics such as average handle time and average after call work time. While these efficiency metrics still play an important role today, this approach was centered primarily around the speed of ending



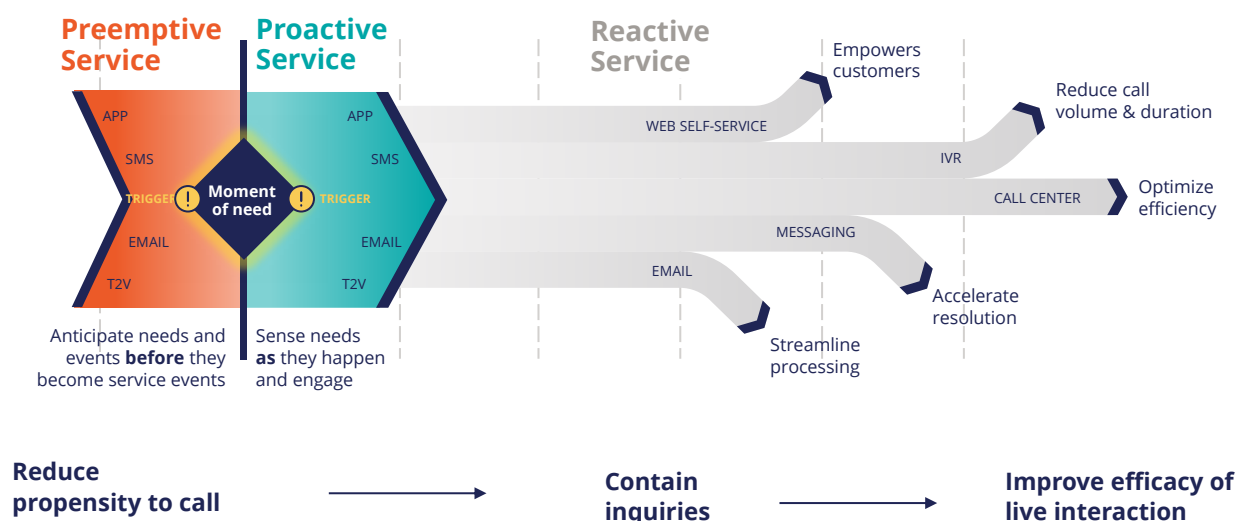
customer interactions – rather than the actual customer and agent experiences.

Just as the world has evolved from manual switchboards and legacy mainframes of yesteryear, so too has the way customer service teams operate. **The call center has been reinvented into a digital contact center where businesses manage interactions and customer journeys across multiple channels – often triaging some of the phone-based volume while offering routes to faster resolutions.**

Technologies like interactive voice response systems (IVRs), web self-service, intelligent virtual assistants, digital messaging, and email automation open up the service ecosystem while helping contain more inquiries. These hold the promise of enhancing customer and employee satisfaction – all while reducing costs and automating more work. With so many technologies to choose from though, it's critical to adopt the right approach. You need technologies with robust-enough capabilities to overcome any potential shortcomings to deliver truly customer-centric experiences.

Reorganizing around the customer journey

As contact center leaders strive to provide this customer-centric service, the ones that have seen the greatest success have resisted the common trap of putting channels at the center of their strategy. Rather than building logic and decisioning into each individual system or channel – which often leads to silos and limited visibility into customer history – contact centers are rethinking their customer service by putting people (their customers and employees) at the heart of their strategy. **And that means organizing around the customer journey.** This involves building processes around how your customers act and what they need – and it all comes down to delivering on their individual desired outcomes. Moving from a channel-led strategy to a channel-less strategy is key to effectively organize around the customer journey and carry context across any channel. Using this strategy, the channel itself



becomes irrelevant and each individual customer journey becomes the focal point.

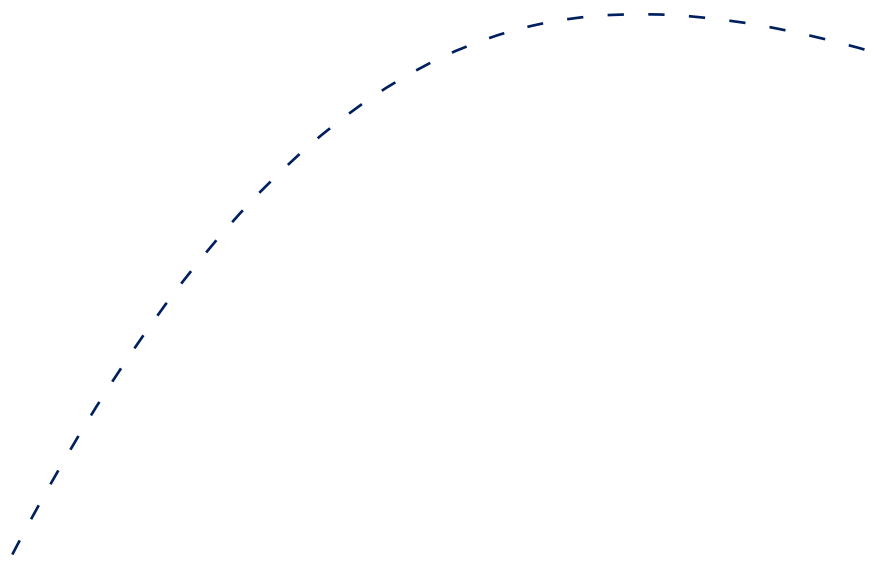
To help your channel-less strategy become a reality, a Center-out™ business architecture allows you to build centrally and then activate that same logic and decisioning across all of the different channels and systems in your service ecosystem.

Regardless of the time of day, channel, or system, your customers will receive consistently great experiences – on both agent-assisted and non-agent-assisted channels. With full visibility into each customer's journey and the new ability to carry context across channels, you can resolve issues faster and build long-term loyalty with your customers.

“We’re reimagining business processes and we’re washing away complexities.”

– Dan Burton, Sun Life Financial

[Watch the full video](#)



Achieve customer centricity at scale – while reducing costs

With the right technology strategy in place, you can meet customers where they are while also significantly reducing costs. It starts with implementing these core technologies into your overall service strategy:

- 1. Scale across your service ecosystem, without duplication:** By employing a Center-out business architecture with multidimensional case management serving as the foundation, you no longer have to start from scratch each time you expand your service or change a process. Now, you can build logic and decisioning once and then reuse that same logic in different scenarios, saving you time, money, and resources. This also eliminates any costly band-aid approaches.
- 2. Contain more inquiries with contextual self-service:** Unlike traditional self-service, which often results in customers ending up having to call, contextual self-service helps to provide multiple pathways to resolution. Several of these pathways empower customers to resolve their issues without any agent assistance. With case management serving as the foundation, this can be achieved across multiple channels, including web portals, mobile, and intelligent virtual assistants (IVAs).
- 3. Offer 24/7 support with intelligent virtual assistants and email bots:** IVAs and email bots that understand customer journey and context can contain even more inquiries, reduce handle time, and process and resolve inquiries from start to finish. By containing certain inquiries using this approach, you can manage peaks in volume while also ensuring that customers receive quick resolutions tailored to their needs.
- 4. Accelerate resolution with knowledge management everywhere:** Providing the most relevant information to get customers to resolutions quickly can help both agents and clients alike. For agents assisting customers, knowledge suggestions help them deliver the most appropriate solutions quickly and easily. For customers seeking to self-serve, they no longer need to wade through loads of irrelevant information to get the answers they're looking for. With effective, journey-specific knowledge management, customers can rely on guided troubleshooting, as well as online and community messaging boards – reducing the overall propensity to call.
- 5. Automate the busywork with unattended and attended RPA:** Unattended and attended RPA can dramatically improve your business' speed and efficiency, which ultimately results in dramatic gains in productivity. Minimize cost-to-serve by letting the bots handle some of the manual, repetitive tasks that might be slowing down your team.
- 6. Unifying your digital channels:** As customers adopt new digital channels, managing each of these separately often results in agents having to toggle between disjointed applications and screens. By consolidating your digital channels into a single screen, your agents can seamlessly manage a greater number of concurrent conversations and contain more inquiries before they ever reach the phone.

With the adoption of these more cost-effective approaches, you can significantly reduce overall spend while delivering scalable service that meets the demands of today and whatever tomorrow brings.

Aflac, a leading North American and Japanese insurer, was able to revolutionize its claims process and contain 80% of its highest-volume inquiry (claim status) using Pega Intelligent Virtual Assistant™. This IVA understands each customer journey and resolves inquiries without the need for a live agent, reducing overall costs.

[Watch the full video](#)

Simplify experiences for your customers

Along with reducing costs, reorganizing around the customer journey helps simplify customer experiences – a win-win for both your customers and your business. So, what is it that customers seek today? They are seeking convenience. And that means service that is:

- **Low effort**
- **Consistent**
- **Fast**
- **Available 24/7**

This goes beyond just being available on the channel of their choice, but also being able to effectively resolve customers' needs in that channel. **A Center-out approach can consistently provide customers with this type of high-quality service. With logic and decisioning built centrally, your customers' context and history is carried across every interaction.**

With the foundation of multidimensional case management and intelligent automation as the underpin of our Center-out approach, customers no longer have to repeat information, switch from channel to channel, or ever wonder where they stand in a process. Now, **you're able to provide the same quality of service on every channel that your customer is reaching out from – whether that's via an IVA, IVR, web portal, or the phone.**

For example, if a customer signs into your mobile app to check the status of a claim, you now can provide them with a completely personalized web portal that immediately recognizes them and supplies that information – without the need of an agent. And for more complex inquiries where an agent does need to get involved, the agent now has full visibility into the customer's journey – so they can resolve their issues faster and better understand each customer's unique needs.

This level of personalized service can also help your business protect revenue. Using real-time AI, you can present relevant, empathetic offers that make sense for the customer during moments of need. This may mean an opportunity for a cross-sell or upsell. Or at other times, it could mean a retention offer – boosting customer loyalty. All in all, these strategies help maximize customer lifetime value and even grow your business


UPC, one of Switzerland's largest cable providers, was able to introduce a new digital IMove customer journey that enables customers to fully initiate and resolve move requests online – all by using a digital-first approach that prioritizes the journey before the channels. This process now only takes 10 seconds to complete and has reduced internal costs from \$10 per request to nearly \$0.

[Read the full story](#)

Simplify the agent experience

Your customers aren't the only ones who may be experiencing friction in service journeys. Agents often face many points of friction across the different channels they support. By devising the right technology strategy in your contact center, you can also simplify service for your team.

Simplifying your agents' lives starts by eliminating some of the areas that cause the greatest frustrations for them in their day-to-day tasks. In our global customer service insights survey, we found that the top frustration among 40% of agents was having to pass customers between teams/departments. Other common frustrations among service agents include having to ask customers for information they've already supplied on another channel, managing multiple applications and screens, and needing to manually enter the same information in different systems.



With the same Center-out architecture that simplifies experiences for your customers, these agent frustrations can be eliminated. It starts with the help of case management and intelligent automation – allowing agents to have full visibility into the customer journey and manage more work than ever before. Additionally, real-time AI serves up intelligent guidance on actions and offers based on the customer's needs, so agents don't have to pass customers to other departments or potentially miss opportunities to upsell or cross-sell. Meanwhile, unattended and attended robotic process automation (RPA) can take some of the heavy lifting off agents by attending to repetitive, labor-intensive tasks such as copying and pasting information across systems.

Implementing a unified messaging desktop can also help simplify the overall agent experience. **By consolidating all of your digital channels into a single interface, your agents can seamlessly manage concurrent conversations across channels.** This allows your team to get through the work in their queue more quickly, without sacrificing the positive customer experience they strive to deliver. And this means that whether a customer is reaching out via a popular social channel, IVA, SMS, or chat, your organization can resolve issues faster while driving down cost-to-serve.

All of these technologies make it easier for agents to be effective in their roles, while also reducing employee turnover. And when agents have an easier time doing their jobs, they can focus more time and energy on what matters most: effectively serving your customers.

Digital Federal Credit Union (DCU) was on a mission to become more member-focused. With the help of Pega Customer Service™, DCU consolidated 15 systems down to just one, driving efficiency across the organization.

"Through our digital evolution with Pega, we have become a less siloed organization – we're all championing the same solution."

– Daniel LaBarre, Director Information Center, DCU - Digital Federal Credit Union

[Read the full story](#)

Resolve before they ring

Adopting these technologies is critical to your team's success in today's fast-moving environment, but what if you could take it a step further to sense moments of need as they are happening or even **before** they actually become problems? Service that customers never have to wait for – even quicker than immediate. It may sound too good to be true, but with the same Center-out business architecture serving as the foundation, you can provide this type of proactive and preemptive service.

Proactive and preemptive customer service relies on AI and predictive analytics to assess information in real time and make decisions that anticipate and deliver on customer needs – before the customer even has to reach out. It means you can address an issue before the customer ever realizes there is one.

By using AI, event triggers, decisioning, and pattern detection, businesses can detect patterns that reduce the overall propensity to ever need to call.

It could be an internet service provider reaching out to customers to let them know that there is an outage and provide an estimate on when service will be restored. Or it might be an email from a bank prompting a customer to enroll in overdraft protection when a checking account balance is low.

These advances in AI and automation are also paving the way for the next generation of autonomous service, which is smart, journey-centric, and completely automated. **When you proactively reach out to a customer about a need they haven't realized they will soon have, it makes them feel like someone is looking out for them.** And when you give customers one less thing to worry about, it gives the impression that you do truly care. This type of service benefits your customers and also your business.

Addressing many customers' concerns or needs before they arise can also go a long way in helping you manage the volume of customer inquiries. When you fulfill a customer's need before they ever notice, then you can contain or even avoid the need for them to call, text, message, or contact your organization to solve their issue. Addressing customer needs in this way helps create more satisfied customers, while helping to save you money by driving down contact volumes.

Deliver simpler service, boost customer satisfaction

Despite service leaders' goals of driving simpler experiences in the modern-day contact center, many continue to struggle to deliver on these goals in practice. What may have felt out of reach in the past is now achievable – when you have the right strategy and technology in place. For starters, think beyond the channel and start focusing on the heart of your business – your customers and employees. Adopting a Center-out architecture can enable you to start building out journey-centric customer experiences. This means breaking down silos and creating consistency and continuity across both agent- and non-agent-assisted channels.

By adopting the right approach, enabled by more advanced technology – like multi-channel case management; real-time, omni-channel AI; IVAs; RPA; and unified digital messaging – you can deliver truly customer-centric service at scale, even when there are unexpected influxes of customer inquiries. **The future of simplified service is beyond the contact center.** This next-generation contact center helps you deliver service that feels simpler for everyone, from the customer to the agent to your IT staff. Better yet? It can help you to drive up customer satisfaction without also driving up overhead costs.

Ready to start simplifying your customer service?

We're ready to help.





Pega is the leader in cloud software for customer engagement and operational excellence. The world's most recognized and successful brands rely on Pega's AI-powered software to optimize every customer interaction on any channel while ensuring their brand promises are kept. Pega's low-code application development platform allows enterprises to quickly build and evolve apps to meet their customer and employee needs and drive digital transformation on a global scale. For more than 35 years, Pega has enabled higher customer satisfaction, lower costs, and increased customer lifetime value.

For more information, please visit us at www.pegacom