



WHITEPAPER

Creating customer-centric service with AI and automation



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Change is the only constant

The saying “the only thing that is constant is change” dates back to the ancient Greeks. And while this phrase may feel overused, it’s perhaps never been more true than today. Today, change happens faster than ever and unpredictable incidents can arise at any moment. Organizations must consider how they can provide customer service that can quickly respond to changes. These changes can be the arrival of a popular new channel, an unprecedented increase in customer inquiries, or a new global disruption as we have seen in recent months. Regardless of what changes, customers will still expect timely service and satisfactory resolutions to their issues.

Keeping up with change can be challenging. Many organizations are still working across disparate, outdated systems. Many find it tough to scale their customer service efforts to keep up with demand. And that demand may shift to alternative channels, making it even harder to move in context with their customers as they switch from one channel to another. This comes down to two primary issues:

1. Organizations have been using the wrong approach.
2. Organizations don’t have the right technology.

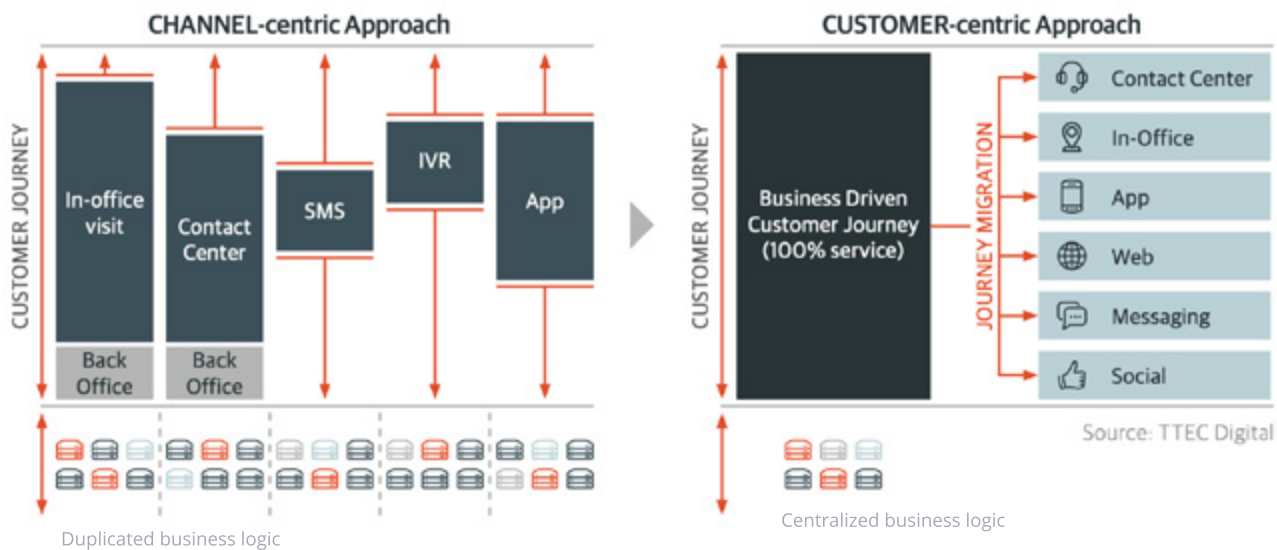
The ability to adapt to customer needs whenever they change relies on a customer-centric approach. Many organizations *claim* to be focused on their customers, but a quick look at how they operate their customer service programs tells another story. **The truth is that many organizations, in their attempt to become more customer-centric, have actually become channel-centric.** The intention was right, but the execution was all wrong.

So, what does it mean to be channel-centric? In your efforts to keep up with customer expectations – which is absolutely the right thing to do – maybe you focused on baking the new logic into each of your channels. To try and best replicate the experience in these new channels, you took the logic from your call center and attempted to approximate it in your web chat, email, SMS, social media channels, and so on.

If this sounds familiar, it’s because most organizations have done the same thing. But there’s a better way. To become customer-centric, you need to move to a **channel-less approach.**



A channel-less approach centralizes the necessary logic instead of creating new silos in each individual channel. The logic is applied to the customer's individual journey just once – no matter which interaction channel (or channels) they choose. The journey is maintained from the center-out, rather than being designed from the top-down, one channel at a time, or from a siloed data layer upward. This way customers receive a consistent experience regardless of which channel – or even how many channels – they use to contact your organization. Connecting the logic to the customer journey instead of the channel means customers can move freely across channels, being able to pick up wherever they left off without losing any context.

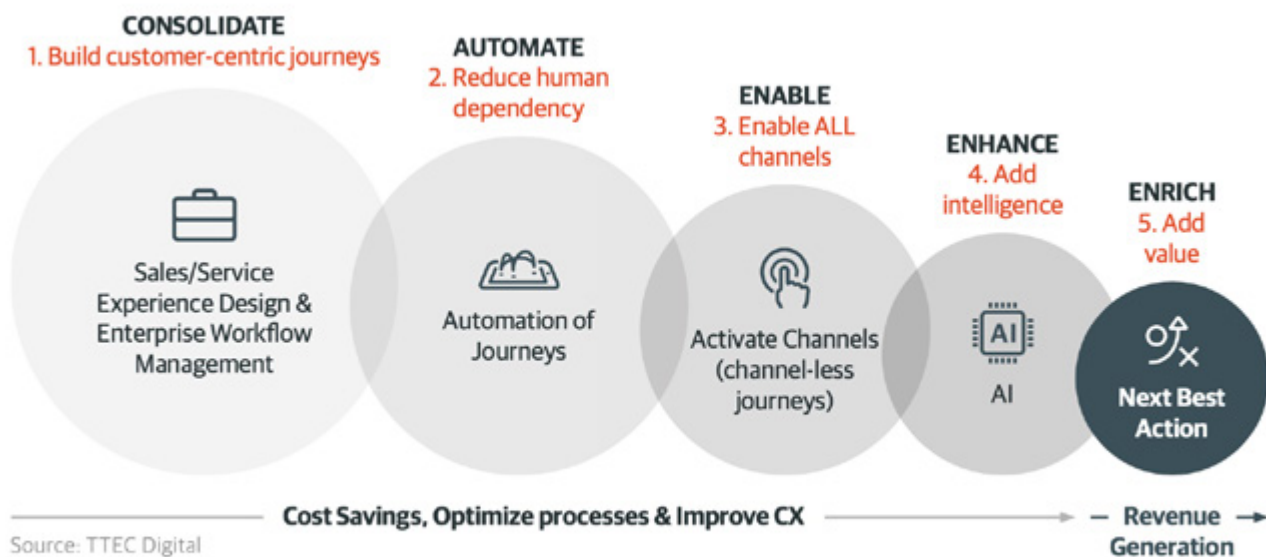


Recent advances in technology play an important role in enabling this customer-centric approach. Artificial intelligence (AI) and automation are essential to supporting modern demands of customer service. AI provides the ability to apply the necessary logic across the full customer journey, while continuously learning from each interaction. Meanwhile, advancements in automation allow organizations to become less dependent on human agents. Together, these technologies help to deliver more efficient service, while reducing the cost per interaction. AI and automation will be two of the most important technologies to support your channel-less approach, as you focus on transforming your organization's customer service to one that truly puts the customer's intent at the forefront.

Five steps to customer-centric service transformation

Putting your customers first comes down to more than stating your customer-centric intentions in mission statements or presentations. Living up to the claim can be achieved with five steps:

1. Consolidate
2. Automate
3. Enable
4. Enhance
5. Enrich



By following these steps, you can reframe your approach to put the customer at the center of your service – effectively optimizing your processes, cutting costs, and improving customer satisfaction.

1. Consolidate

The first step to delivering more customer-centric service is to understand the current critical customer journeys. Identify where the friction exists, and then define an ideal end-to-end customer journey that eliminates such friction. In many organizations, customer journeys are often determined by the existing technology and internal organization, leading to a fragmented and siloed approach. Neither system limitations nor internal organizational constraints should deter you from servicing your customers right. **Consolidate and narrow your focus on the friction to pinpoint the most important gaps in your current journeys.** Consider which interactions tend to lead customers and agents to feel dissatisfied. This will help you identify where the crucial gaps exist and where you have the greatest opportunity to improve the customer experience. Look for the commonalities among those interactions: Are they always related to a similar inquiry? Do billing mistakes consistently create issues? Do customers frequently end up using one channel, like the call center, after failing to get to a resolution on other channels, such as self-service or web chat?

So you've determined which journeys customers encounter the most friction. Next you must define the key personas that most commonly take these journeys. What do these customers tend to look like? What are their needs and interaction preferences? How do they typically act? What are their most common service interactions with your organization?

These questions all fundamentally relate to the customer intent, which must remain the primary focus. You must understand where customers currently hit snags in their service experience. Learning what it is they are trying to achieve allows you to pinpoint which journeys and touchpoints require attention. Prioritizing the most critical journeys for the majority of your customer base will help you make the most important changes first. You can then work iteratively until you've overhauled each customer journey to ensure the most ideal customer experience.

2. Automate

At this point you've consolidated your focus and defined an optimal customer service experience. The next step is identifying where in the workflow you can automate tasks to be more efficient and effective. Automation prepares your organization to provide the digital customer service experiences that customers expect. Case management and robotic process automation (RPA) can help speed up processes and reduce the amount of manual work required from agents, such as copying and pasting information across systems. This enables agents to move more quickly through any interaction, resulting in faster resolutions as well as shorter wait times for everyone. **Reduced interaction time helps your organization save money while still delivering outstanding customer service experiences – without the need to change your existing systems.** Not to mention, when agents are no longer bogged down performing rote tasks, it frees them up to listen to your customers and engage with empathy.

3. Enable

Customers expect a level of service that delivers quick and easy resolutions consistently – regardless of the customer's issue or the channel through which they choose to engage. That means you need to enable all channels so that service experiences are consistent – no matter which touchpoint a customer uses to contact your organization. Take it one step further to enable truly channel-less interactions: Ensure customers are free to move from one touchpoint to another, while maintaining the full context of their interaction. **For example, enabling your web self-service, intelligent virtual assistant (IVA), chatbot, or even interactive voice response to have the same level of conversation customers would have with your agent.** This can become a reality when your strategy focuses on the customer's journey, not the channel.

4. Enhance

Infuse each interaction with AI to enhance the customer experience. AI empowers your organization to provide more personalized service to your customers. It carries the specific context of the interaction through each step in the customer's journey, along with important information regarding the customer's preferences, historical behavior, recent interactions with your organization, sentiment, and even likely intent. AI acts as a centralized brain that responds in real time. It helps connect customers to the resolutions they seek – whether they use an agent-assisted channel, or a fully digital, automated channel.

What's more, **AI-empowered, next-best-action technology uses intelligence to enable proactive service. It can reduce potential journey blind spots by predicting what the customer's needs will be, making it faster and easier to resolve them.** Say a customer needs to pay their credit card bill that's due that day. With AI and next best action, the bank could send an email or SMS reminder with a link to open the banking app on the right screen for the customer to pay their bill. With just two clicks, the customer can complete the task – they didn't even have to remember the bill due date. What customer wouldn't be pleased with service like that?

These five steps lay out the foundation of a customer-centric model. They help to reframe the approach and highlight the importance of digital technologies to provide the type of service customers have come to expect. And AI and automation aren't the only tools that can help you achieve your customer service transformation.

5. Enrich

AI can help you take your interactions to the next level by truly adding value for your customers – and your business. With its ability to synthesize information across all channels, interactions, and journeys in real time, AI can guide both customers and agents to the right decisions with next-best-action suggestions, including cross-sell, up-sell, and retention offers. **It goes beyond simple preprogrammed options; next best action uses data based on the specific customer's needs and preferences at every touchpoint along their journey to provide a true one-to-one experience.**

Next best action can enrich the moment of opportunity with the ability to influence customer lifetime value. Consider a communications service provider (CSP) that notices a customer who has started working remotely has started to go over their data for the past couple months. Prior to the third month's bill, the CSP may reach out to the customer to offer an upsell. For just a few extra dollars a month, the customer can get unlimited data and avoid the overage fees. This is a win-win: the customer avoids frustration and gets a plan better-suited to their needs, while the CSP has boosted revenue and reduced the risk of churn.

Transformation begins with quick wins

For most organizations, customer service transformation means redefining your approach, taking the time to understand what your customers truly want, and implementing new tools. This may sound like a massive undertaking, but you don't have to do it all at once. Full transformation starts with a series of smaller, quick wins that show results in days or weeks. When done effectively, these quick wins serve as more than temporary solutions – they are valuable, incremental gains that lay the groundwork for the state of your future customer service.

We have already reviewed how to consolidate your efforts and identify the spots in key customer journeys that require the most attention. Now we'll focus on the tools that can provide you with quick wins today – and transformation tomorrow.

AI as agent copilot

Wouldn't it be great if every agent was as good as your best one? Your organization can achieve just that, with AI and automation working as an agent copilot. AI-augmented agent capabilities improve productivity, suggesting personalized responses and knowledge articles determined by AI models that continuously learn. Next best action relies on predictive analytics to calculate the most appropriate decision in the moment.

AI can also use machine learning to “listen” to customer chats, understand the content, and pre-populate the chat based on context and dialogue – not just canned responses. This intelligent guidance spans across channels, from chat to social media to phone calls or face-to-face information. AI can help ensure that each customer interaction is seamless.

AI as copilot in action: A major health plan provider relies on AI-driven insights to improve its appeals and grievances process. Using a smart rules engine, the healthcare company can now prioritize cases based on urgency. This has led to a 66% boost in productivity, 33% increase in accuracy, and 13% increase in timeliness of resolution.

Automation to clear the way

What if your agents could offload some of their rote tasks to someone else? Let someone else enter the same information across multiple applications or complete the many steps required to wrap-up interactions? It would allow them to move through interactions more quickly, while also paying more attention to the customer with whom they are interacting – giving agents the chance to provide friendlier and more empathetic service.

Your customer service representatives can have a copilot automation that runs in parallel with them on their desktop, assisting and guiding them through all the systems and processes required to serve your customers. Though many agents have already learned every tip and trick in the book to speed up their service, they are still slowed down by rote, manual tasks. And the chance of errors and oversights becomes greater when they try to move too quickly. Automation enables them to increase the speed of service while reducing the chance for errors – and the cost per interaction.

With the help of robotic process automation (RPA), unattended bots can fully automate many back-office tasks like the repetitive tasks that prevent agents from focusing on higher-touch, value-add opportunities. RPA can also connect the full journey, bridging gaps between systems and data integration.

Automation as co-pilot in action: A major telecommunications incumbent company decided to automate its front-office processes using robotics on top of its existing systems. The team selected the four most relevant processes to start with. In four weeks, individual improvements ranged from 36% to 72%, and overall average handle time jumped by more than 20%.

Email channel automation to drive efficiency

Email is easily overlooked as a great channel for customer service. To agents, it feels like a lot of work to comb through each email to determine the customer's question. And customers often feel like they'll just receive some impersonal, canned response. Email has a bad reputation, but it doesn't have to be this way.

AI-enabled bots use email channel automation to automatically open each email and apply natural language processing (NLP) to understand each message's language and intention. Rather than forcing agents to skim each email to understand the customer's need, the bot can do it for them. Email channel automation enables your organization to instantly route messages to the right place. In many cases, email bots can even reply with automated yet tailored responses without any human intervention. That's how you make email work for you – and your customers.

Email automation in action: A financial services company had more than 45% of its workforce dedicated to addressing customers' emails. Using email automation, it could reduce 75% of the resources required to attend and address customers through email. This freed up resources to move to the voice channel and improve service levels there.

Intelligent virtual assistant (IVA) to accelerate resolution

Self-service is often an underutilized channel for many organizations because their self-service options are inadequate. Ideally, self-service options should act to contain the volume of agent-assisted requests. Instead, many of them wind up sending customers down a rabbit hole, only to have them end up on agent-assisted channels more frustrated than if they'd started there.

A contextual IVA goes beyond traditional chatbots that could accomplish basic tasks. These new chatbots are based on true intelligence and can contain more complex customer inquiries. IVA focuses on the customer's journey, enabling dynamic customer conversations, understanding the individual's intent, and providing personalized, human-like responses. And the best part? Adding an intelligent bot doesn't need to be another drawn out integration project. IVA takes advantage of existing processes and data to seamlessly work within your existing infrastructure. The latest generation of IVA even has the power to wrap itself around each customer's journey in that moment, not just answer simple questions about store hours. It is more easily able to contain and resolve inquiries before they ever become expensive, agent-led interactions.

IVA in action: A North American insurer employed IVA to help contain inquiries that used to reach an agent. IVA now contains 60% of inquiries and creates resolutions across a dozen types of interactions. Within three to four months of implementation, the insurance company saved more than \$200,000 in cost avoidance.

Unified messaging to connect the conversation

Let's face it, in today's world with all its complications and unpredictability, you need to be ready to help customers wherever they are. Your customers are on web chat, your website, Facebook Messenger, Twitter, SMS, WhatsApp, and Apple Business Chat (iMessage). Are you? If not, you're missing out on valuable opportunities to make service easier and more convenient for your customers and agents.

Your customers can access service through digital channels first, using whichever channel is at their fingertips – all with unified messaging. And when customers choose to contact your organization through digital channels instead of calling in, your agents can handle multiple interactions concurrently on a single user interface, increasing speed of resolution and reducing the cost to serve. Better yet, unified messaging can help your organization scale to digital channels in just seven days. In one week, you could start seeing measurable results from unified messaging.

Unified messaging in action: A major player in the hospitality industry was seeking new ways to support the preferences of younger generations of guests visiting its facilities. It sought a convenient, timely way to inform patrons of important details, particularly at the start of a guest's trip. Implementing unified messaging allowed the brand to quickly support asynchronous mobile communication via SMS, which led to an increase in customer satisfaction, retention, and loyalty.

Make it real today

As discussed, customer service organizations can take swift action to improve operations with the right approach and technology. Start with automation to achieve quick wins on low-risk, high-yield opportunities across your customer-facing processes. Rapid implementation that shows results will build momentum and encourage the organization to keep moving forward. Automation paves the road to redesign the journey in a customer-centric way, enabling a channel-less approach that is built from the center out. This channel-less strategy allows organizations to begin with one microjourney™ and one channel as the starting point, not the finish line. This then allows the business to quickly extend to other channels and additional microjourneys as fast as they'd like – without any throwaway efforts that won't scale.

You can add ongoing intelligence and insight to take your customer experience to the next level – once processes and journeys are already in place. This will also open the doors to create additional value from your customers through AI strategies and continuously improve the customer experience.

Want to learn more? TTEC and Pega have created an industry-leading partnership to work with enterprise clients in solving their customer service challenges using AI and automation. Our experts are ready to discuss the unique needs of your business. [Please visit us today to learn more.](#)



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