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HOW AUTOMATION BRINGS COST, EFFICIENCY AND EXPERIENCE GAINS TO CUSTOMER SUPPORT

NEW ERA OF AUTOMATION

People are expensive, demanding and prone to error. But it's no longer a desire to replace them that is driving automation planning. Leading companies recognize the significance of highly-personal customer experiences and they value the cognitive, reasoning and collaborative abilities of their people. So much so that the aim of automation today is not to find intelligent robots to eliminate people, but to increase the efficiency and effectiveness of workers. Deloitte refers to this as the desire for "intelligent automation", suggesting that:

"[...] By freeing up a person's time, employees can now focus on more advanced and engaging tasks, and over time organizations [can] see lower turnover, higher morale, and increased internal innovation."[1]

The business improvement opportunity using automation, AI and other cognitive technology is worth $9 trillion. It has the potential to benefit 200 million knowledge workers, while delivering 600% to 800% returns for specific tasks[2]. But new technology and software-led processes mean massive day-to-day complexity in businesses today. Even those that adopt the latest innovations struggle because customer growth, process development and systems upkeep rarely happen evenly. Here is where automation shines — and where Customer Support stands to benefit.

[1] https://www2.deloitte.com/content/dam/Deloitte/us/Documents/process-and-operations/us-sdt-process-automation.pdf

[2] https://www.cio.com/article/3019587/innovation/the-business-of-bots-and-the-realities-of-enterprise-automation.html

Automation underpins the digital transformation designed to help companies manage climbing customer counts, service demands, employee engagement and multifaceted system, process and technology plans. In a support context consider how a season of customer growth prompts change:

Customer counts rise ▶ new hires onboard to handle growth ▶ manual processes are updated inconsistently ▶ technology gets siloed or haphazardly rolled out ▶ routine knowledge is lost as new applications, people and policies are introduced ▶ customer experiences decline as overtaxed agents and under-applied technology struggle to keep pace

These business conditions are the new normal and show why automation is essential to building better support functions.

AUTOMATION:
THE FUTURE OF CUSTOMER SUPPORT

Competitive realities require that growing companies figure out how to serve customers better, faster and more affordably than their peers. The pressure of responding to demands for high-touch experiences across millions of consumers in a world saturated with impersonal technology is overwhelming. Leaders are at an impasse: they must support business expansion and enhance customer interactions without creating associated growth in back-office functions and headcount.

This Is the Automation Opportunity.

Modern automation tools are designed to increase the amount and quality of work an organization can handle. A recent future-of-work study by IBM acknowledges that this is crucial in areas where headcounts may be static, but workloads must scale upward to accommodate offerings, customer demands and seasonal fluctuations[3].

Sounds a lot like most customer support contexts!

The research acknowledges that automation capabilities have matured so well and so fast that in virtually every industry, the use of these tools means that increased profitability and increased quality go hand-in-hand. But to unlock the value, leaders must first understand:

"What is automation?"

Automation is the organization of systems and process workflows using digital technology. These technologies incorporate tools that reduce manual involvement in repeatable and predictable activities. Automation tools vary in terms of their "intelligence" or cognitive abilities – some are pre-programmed and highly-rules driven. These basic tools rely on connections to various systems, a predictable set of task requirements and perform low value work without error and at scale. Others reflect more genuine artificial intelligence (AI) and are designed to mimic human thinking, learning and adaptability by generating meaningful insights as tasks are completed and data is processed.

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[3] https://www.ibm.com/automation/ibm-automation-platform-digital-business

The automation opportunity exists because of the confluence of emerging, disruptive technology types. Low-cost computing, storage, machine learning, big data, analytics and natural language processing – together these have created tremendous potential for Customer Support. Those leaders that welcome these these can bring considerably more scale, cost savings and efficiency to their organizations.

Below, the fundamental improvement areas created by automation are outlined:

Streamlined Processes

Repetition and redundancy erode agent morale, prompt attrition and reduce intelligent staff to robots. Automating technologies can be applied with chatbots, email autoresponders or AI-powered knowledge base tools to drive rapid, self-service support. Having virtual agents or systems that are capable of delivering relevant answers to common, queue-clogging issues in real-time can smooth processes and grow customer satisfaction.

Similarly, non customer-facing processes may be improved through automation. Leaders may notice their teams bogged down by data processing, internal sharing, multiple system navigation or ticket tagging and transferring. These are all areas where automation software can be additive; restoring agents' time to focus on customer-centric work.

Reduced Friction

Friction is anything that stands between a customer question and an opportunity for resolution. It ranges from too much hold time, to too many transfers or inadequate and inaccurate information. One recent customer service survey found that 74% of Americans say contacting customer service is frustrating and nearly half agreed that they would rather spend thirty minutes cleaning a bathroom than waiting on hold for an agent[4]. Fortunately, automation can reduce frustration-causing friction and provide a degree of responsiveness that isn't generally possible by human agents alone.

[4] https://blog.hubspot.com/service/rethinking-customer-service-jobs

Friction reducing automation best practices include –

- Establishing smart content and curated internal knowledge base sources so agents have access to the right information at the right time
- Using predictive analytics to preemptively address customer issues by sending email tutorials based on a purchase or search trigger
- Using interactive voice recognition to direct callers to the right agent or department
- Applying AI to identify repetitive tickets and recurring customer issues to offer intelligent virtual agent support
- Centralizing customer communications and connecting support channels so internal agents, regardless of the channel they support, have access to customer information and history

Higher Volume, Lower Cost

Automated customer support is not constrained by time zones, sick leave, holidays or agent hours. Nor is it overwhelmed by surges in support requests. This matters as response timeliness becomes a top satisfaction factor for customers. A service survey by Millward Brown Digital found that 72% of customers expected a response within an hour if they complained to a company via Twitter[5]. And more than half of customers expect the same response time at night and on weekends as they do during normal business hours[6]. Impossibly high support standards across non-traditional channels is the new norm. This demands that companies accommodate a higher volume of issues rapidly, even as requests come increasingly omni-channel.

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[5] https://www.lithium.com/company/news-room/press-releases/2013/consumers-will-punish-brands-that-fail-to-respond-on-twitter-quickly
[6] https://www.forbes.com/sites/blakemorgan/2016/04/18/the-evolution-of-customer-service/

To manage this, leaders must amplify agent ability and availability. This may take the form of heightened customer self-service options, like assist technology that connects customers to relevant FAQs to reduce human intervention in routine asks. Or it may be internally focused; reducing the "swivel chair", multi-system navigation dance that agents deal with to find information across a variety of screens and apps at their workspace.

These automation assists can dramatically lower costs too. Zendesk found that up to 80% of customer support requests are Tier 0 or 1, meaning: they can be resolved through well-optimized self-help content or at the first level of human support in just one to ten minutes[7]. They found that only 20% of tickets require specialized agent knowledge – and only a fraction of those were considered Tier 3, or needing ninety-plus minutes of an expert's time. Given the profile of most support requests, leaders should introduce automation through relatively-cheap digital means to handle the bulk of inbound issues. Expensive support, that is, human-led, can then be strategically applied to the cases where it's actually needed.

Engaged Employees

Engagement levels are sinking and this poses serious customer experience issues. According to Aspect Software research[8]-

- Less than two-thirds of support agents say they are satisfied in their roles.
- Another 33% say they are actively looking to leave their current place of employment.

While attrition requires multi-thousand dollar investments to find, interview and onboard staff, these may pale in comparison to the downstream effects of team discontinuity, lost manager productivity and poor customer experiences delivered during seasons of turnover.

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[7] https://www.zendesk.com/blog/is-tiered-support-for-you/

[8] https://www.aspect.com/landing-pages-2017/aspectagentsurvey

But, 79% of agents say more complex work will improve their skills and nearly 60% say increased role complexity would help them feel more satisfied and committed to their jobs. By introducing automation leaders can deliver renewed engagement. The bulk of support cases are mundane and yet, still need resolution. Making agents "more productive" so they can move through routine cases faster and get to interesting work is simply polishing a broken method. **It's making smart people better at dull work.** With the right technology, leaders give agents an opportunity to step up into higher-level support strategy work; perhaps QA'ing automation workflows and owning priority ticket engagements. Not only is this more efficient, but leaders uplevel agents' experiences, increase engagement and reduce churn.

VentureBeat, in a recent article on AI-automation practices, reinforces this:

"Customer support agents are happiest when they're equipped to solve the customer's problem to the highest standards [...] Once AI becomes mainstream for call centers, agent turnover rate will naturally drop, customer satisfaction will rise, and we'll see customer service gain a better reputation." [9]

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[9] https://venturebeat.com/2017/11/09/how-ai-can-reduce-agent-turnover-at-support-centers/

APPLYING AUTOMATION IN CUSTOMER SUPPORT

Automation in support is not new, nor something to be feared. From the early days of telephone operators and mini-switchboards[10] which routed calls around factory floors, to basic voicemail and SMS, companies have always tried to minimize the labor and time requirements associated with human work.

Even companies hesitant to embrace modern automation are likely users. An auto-triggered email after a sale or support query or touch-tone voicemail navigation through an 1-800 number — all these are automations, albeit simple ones, designed to expedite service. **Cautious leaders need to recognize: automation is not a necessary-evil of scale. Modern tools actually mean more high-touch experiences in the right situations.** Contrary to legacy belief, customers like engaging with automation technologies, as long as they work. Salesforce found that nearly 70% of customers prefer chatbots for quick communications when connecting with a brand[11]. Forrester found that 76% of customers prefer self-service to alternatives like email or phone support[12].

The landscape of automation is wide and a variety of providers and offerings complicate the search for digital improvement. To help leaders better understand opportunities, here is a categorization of the popular offering types:

Support Center Software

This broad category focuses on AI-enabled customer care; providing standalone virtual agents or virtual assistants to pair with human agents. These streamline customer interactions and do everything from centralizing support requests to triggering emails, tagging, assigning resources, managing bots, configuring dialogue flows, routing tickets or performing conversational or sentiment analytics.

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[10] http://www.telcomhistory.org/vm/exhibitsSeattle6.shtml

[11] https://www.salesforce.com/blog/2018/01/why-consumers-prefer-chatbots.htm

[12] https://go.forrester.com/blogs/16-01-28-online_self_service_dominates_yet_again_why_its_an_effortless_way_to_
get_to_your_answers/

Platform Infrastructure

Cloud-based telephone support platforms are growing as teams overhaul legacy systems that lack modern integrations and are resource intensive to maintain. Amazon Connect, Twilio and Zendesk Talk are some of latest. Embedded in these are contact flow creation tools, data mining and analytics tools, intelligent conversational bots and open-platform and API connection capabilities. Automated interactions with popular CRMs and ticketing systems for flexible, scalable and easily-deployable phone support are also common.

Bot-centric Applications

Conversational AI solutions that employ live-chat, real-time machine learning and natural language processing capabilities are growing too. Solutions that drive interactive automation in everything from mobile app and web interfaces to social messaging apps and voice-based services are also emerging. These systems are designed to solve routine, repetitive tasks like ticket creation, data entry and incident updates while getting "smarter" over time.

Knowledge Centered Support

A subset of general support software and bot applications, knowledge centered support applications automate the development, management, maintenance and delivery of content for agents. Central to satisfactory support experiences is access to accurate information. Providers in this space deliver AI-powered search and knowledge base solutions – both customer and agent facing – to decrease case resolution time and provide better answers. These types of AIs bring automation in a way that doesn't hurt desired human-to-human interaction and can understand customer or agent intent. This reduces dependency on scripts or keywords to ensure content delivery accuracy.

Support Routing Optimizers

This class of tool offers intelligent routing capabilities to direct customer inquiries to the right support person. These are examples where automation tools are not customer-facing, but applied in a triage service fashion to reduce resolution time and accommodate multi-channel support as customer inquiries move omni-channel.

Social Media Care Solutions

This growing segment delivers automated monitoring across social channels to give support teams visibility into customers' digital interactions. These tools can contextualize conversations, derive support cases from social posts, provide rich sentiment data and offer relevant content to address customers' social media feedback.

7 DO'S AND DON'TS OF AUTOMATION

Cost savings, convenience and customization — all tempting propositions as the reality of labor costs, cross-channel support complexities and customer expectations expand. But the capacity and computational potential of technology is two-edged. Leaders need to give thought to automation's impact while weighing values of cost, connection, culture and internal capabilities. Here are seven points to consider when building the automation agenda:

Do: Ensure that automation improves customer and agent experiences

A plan to introduce efficiency in one area can backfire if it creates more work elsewhere. A customer-facing bot may reduce the routine tickets created for a front line support rep, but if it's one-dimensional or prone-to-error, customers may abandon their requests or duplicate efforts in a different channel to get answers. Gene Alvarez, managing vice president at Gartner, says that automation tools should offer "[..] more than just information. [They] should enrich the customer experience, help the customer throughout the interaction and process transactions on behalf of the customer." [13]

Do: Focus on experience consistency

In the past, support was a single channel. Customers called and an agent got all the information they needed in real-time. Later, web forms were popularized and agents had customer and account detail served up to them prior to live touches. Today, customers may Tweet, call, chat with a VA and then email support. Agents are forced to piecemeal order, issue or situational context together on the fly. Automation tools should create and reinforce consistency for agents and customers. If one support channel format doesn't "speak" to another, then companies may have multiple agents addressing similar requests. To avoid this, companies may introduce automation that handles routine activities, but that also brings systematic organization, like a modern ticketing system. This ensures that customers are free to connect via a preferred channel, but also that agents have an updated view of a customer's history to deliver consistent service over time.

[13] https://www.gartner.com/en/newsroom/press-releases/2018-02-19-gartner-says-25-percent-of-customer-service-operations-will-use-virtual-customer-assistants-by-2020

Don't: Engage customers in ways that a human never would.

Harvard Business Review warns that if an action would be annoying when performed by a person, it will be annoying when performed by technology[14]. With automation, just because you can, doesn't mean you should. This simple rule keeps support leaders from overdoing the technological touches that automation allows. Excessive auto-response, virtual prompts, unsolicited SMS satisfaction surveys and phone tree complexity are ways that automation, while reducing human intervention, produces poor experiences.

Do: Figure out where automation transformation is needed most.

IBM offers ideas on key areas where automation has the ability to transform work: tasks, content, workflows, decision making and capturing.[15] They are described as the following:

- **Tasks:** Repetitive activities, such as account or order status lookup, that keep human agents from higher value work and can be accomplished faster with error rates near zero.

- **Content:** Support agents depend on available content, both structured (e.g. – inside a knowledge base) and unstructured (e.g. – notes saved in email or company tribal knowledge) to serve customers. Organizing, managing and disseminating this information while ensuring privacy, security and consistency are top concerns.

- **Workflows:** Workflows string together task or content steps to create end-to-end processes. Supporting a loan application, for example, might involve dozens of steps, any one of which may be small and routine, but the end result of the workflow delivers critical results. Automating steps inside workflows increases agility, visibility and consistency.

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[14] https://hbr.org/2018/02/the-parts-of-customer-service-that-should-never-be-automated
[15] https://www.ibm.com/automation/ibm-automation-platform-digital-business

- **Decisions:** Most operational decisions involve detailed, repetitive work according to business policies or regulations. These apply honed business rules that rarely rely on judgement. These repeatable decisions can be captured and automated to improve responsiveness, minimize compliance risk and streamline processes.

- **Capture:** Content is only as useful as the accessibility of the information inside it. Companies depend on agents being able to find, extract and trust content. Once determined, captured and shared, information should be known and accessible. Enterprises cannot have redundancy in answer or information gathering, outdated content, or have agents repeatedly lookup answers to recurring questions. Automation brings capturing and establishment of relevant information beyond the capacity of any human agent.

In determining where to apply automation, leaders should audit existing tasks, workflows, processes and content development or gathering steps and consider where customer and agent experiences degrade or where waste is occuring.

Do: Make human intervention easy.

Customer-facing automaton isn't an all or nothing proposition. The empathy, understanding and creativity required to resolve complex issues is a human discipline. Regardless of the automation tool introduced, human intervention should be readily available. If information ambiguity or problem complexity grows, a hybrid solution should be in place. This approach allows support scale but reduces customer frustrations. Harvard professor and customer engagement researcher Ryan Buell believes: a gracious and well-informed human should be a short stroll, click or tap away[16].

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[16] https://hbr.org/2018/02/the-parts-of-customer-service-that-should-never-be-automated

Don't: **Over, or under, do it**

No matter where automation tools are applied, remember: customers or agents don't need elaborate, they need right. A Corporate Executive Board study of more than 75,000 customers interacting with customer service agents or using self-service channels found that over-the-top service efforts made little difference. What people want are simple, quick solutions to their problems[17]. Similarly, support leaders should also avoid underdoing automation initiatives, or opting for unintuitive, cheaper automation for budget sake. Take some interactive voice response (IVR) systems, for example. While they may automate call handling, touch-tone interfaces, fixed menu options, directed dialogues and spoken input limits can create rigid flows. Customers can't easily change their minds, skip steps, or correct spoken mistakes. Or, take knowledge base search: tools should be able intuit answers even in the granularities of documents, passages or sentences. A brittle option that spits out a list of articles to look through may mean one less search query for an agent, but introduces new work to browse and digest. Automation should make work as easy — if not easier — than not having it.

Do: **educate people on why automation matters**

The idea of automation brings visions of mass layoffs, robot takeover and cold customer interactions to some. Support leaders need to champion the vision to elevate existing support teams, create easier, faster support resolution for customers and increase the quality of personal interactions, when required. Agent fears can be alleviated with a reminder that no longer will they be spending their days working off scripts and asking the same basic questions. Instead, they'll be empowered to tackle more complex, interesting work. Leadership can be reminded that improvements in cost-savings, customer loyalty and attrition are byproducts of automation.

[17] https://hbr.org/2010/07/stop-trying-to-delight-your-customers

CONCLUSION

Every support organization has routine processes inhibiting scale that warrant automation. By raising the performance bar with technology and reducing methodical, repetitive and rules-oriented steps, companies create scale while improving performance in cases involving intuition, judgement, creativity, persuasion and problem solving.

But as attractive as automation is, it should not be pursued without rigor. Support leaders need to build buy in, assess internal readiness, define pain points, plan pilots, understand limitations, establish owners and agree on success factors. Likewise, automation should not be seen as a way to simply eliminate the nuisance of headcount. The short term nature of productivity gains offered by this perspective will give way to weakened customer connections. Instead, plans should be made for how the increased speed and time savings will be turned into additional customer or agent experience value.

When automation tools and people genuinely converge, significant performance improvements can be had and leaders can focus on expanding the core of their business – great, affordable service at scale. Collaborative intelligence and complementary roles are hallmarks of automation – and not surprisingly, of great customer experiences too.

ABOUT

Talla's AI-powered knowledge base and intelligent agents bring business teams into the future of automation and insight. The Talla platform uses machine learning to surface relevant information in the right context, and keeps regularly changing information up-to-date.

Use Talla to onboard new employees, for policy and procedure management, and more. Deliver and collect information through chat in the TallaChat application or through Slack or Microsoft Teams. Get started today at Talla.com.