

Implementing effective eMail response management system

White paper

Author:

Jitendra Lakhankar
CRM Technical Architect/
Business Analyst

jitendra@lakhankar.com
<http://jitendra.lakhankar.com/>

Executive Summary:

This paper is intended to unlock the potential of Email CRM support system and facilitate businesses/technology to understand critical technical components and process. It also guides to craft exceptional implementation strategy and business process re-engineering to achieve superior customer service with uncommon benefits.

It focuses on delivering superior customer service through low cost customer channel. It throws light on getting best of technology and combines it with business process to eliminate the outstanding issues. It highlights lack of tools capability as an enabler to automate and streamlining support process and strategy. It also talk about Industry trends, customer research, evolution in ERMS with technology and IT's failure to deliver the best to businesses.

Readers will get the perspective on of technology component and business process and how both can go hand to hand. It exposes how ERMS system can be implemented well with the innovative technical aspect and support strategy. Target Audience: Customer Support Business owners, Support managers, CRM world (business analyst, architect, consultants)

ERMS

www.customerrepect recently released 2003 online Customer Respect Study of Fortune 100 companies. The study shows as much as 37% of fortune 100 companies did not respond at all to emails OR web-form submitted at their website and 83% surveyed companies did not notify customers that their communication had been received and would be acted upon.

Biggest complaint against email customer service is that companies take too long to respond OR they don't respond at all. Depending on nature of requests, customer is usually willing to accept the delay as long as they know their request will be processed. Track evolving customer expectations and SLA to determine acceptable response time.

Technology/Businesses are highly concerned over ROI matrix. Many businesses do not have ERMS system implemented OR if implemented, business seen complaining about ROI. Older implementation is not getting benefited from new technological development.

Key Components of ERMS:

Smart Email parsing and processing

- Auto Acknowledgement
- Intelligence scripting
- Workflow Driven Email Processing
- Natural language processing

Intelligent Email Routing and Queuing

- Auto routing to defined queues (Priority, department, etc)
- Workload/ Skills-based routing assignment
- Workflow driven logical routing (Keyword OR RULE base routings)

Effective Request Handling

- Dynamic Response Templates
- Handy Knowledge Base sharing with agents

- Reminders/Notifications
- Auto Suggestion
- Sales Escalation
- State Model Capability
- Permissions
- Reminders/Notifications
- Whistle and bells
- Spell Check
- Product Requests/ Management Escalation
- Marketing Escalation
- Complete Information availability to agents

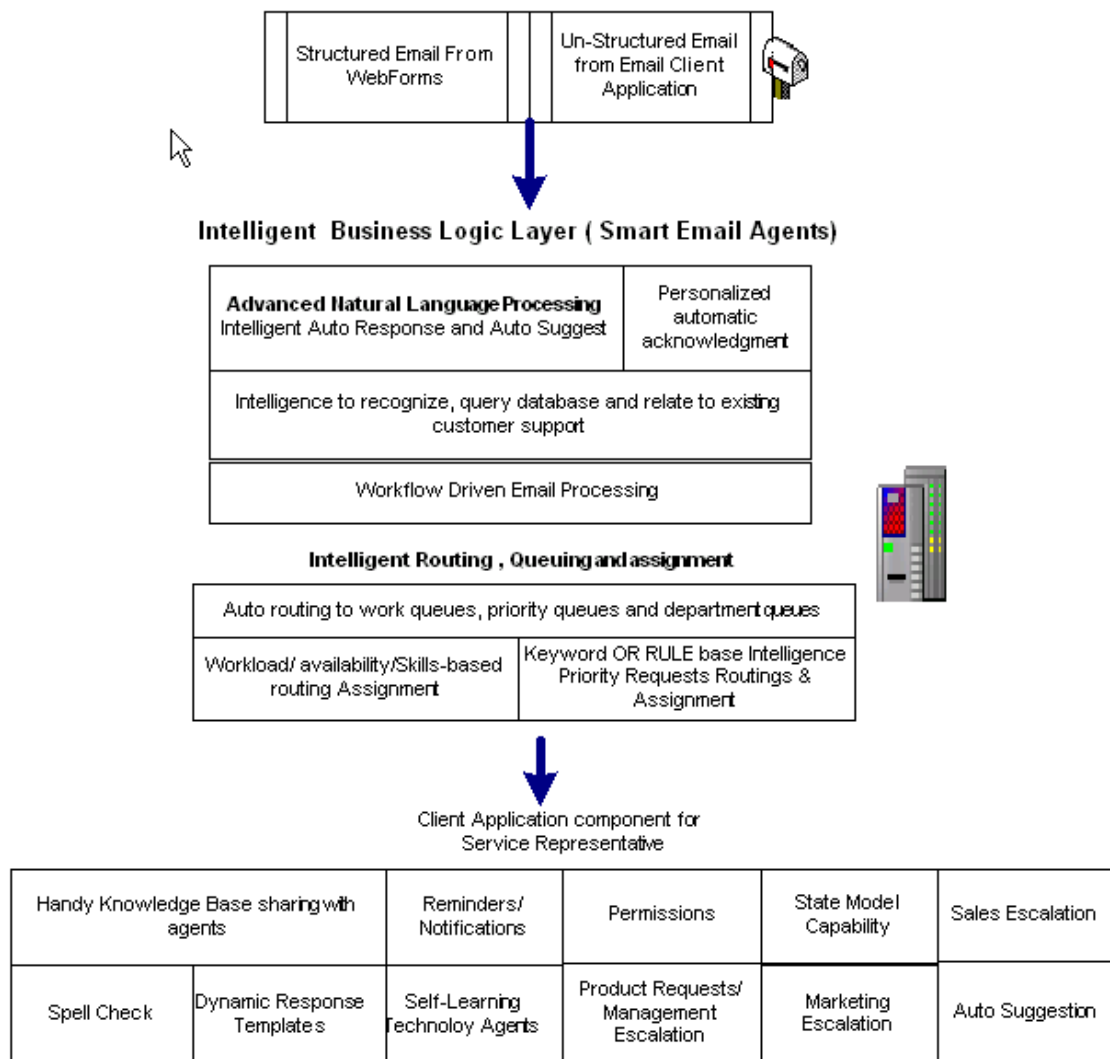


Figure 1: Key components of eMail response management system.

Intelligent email parsing and processing

Auto Acknowledgement

Set up your system to send automatic personalized acknowledgement for all emails and web-form inquiries received. Each auto-acknowledgement contains a customer tracking number to help ensure timely resolution and to provide customers the ability to follow-up on their inquiry via email, telephone, or any of the multiple channels supported. System may provide further personalization by enabling responses to be included with custom messages, depending on the service level agreement, time of day, customer status, generated response time or other scenarios.

Intelligence scripting/ Workflow Driven Email Processing

Organizations can offer customers two ways of sending email messages to the company: unstructured (free-form) email messages and structured (Web-form) email messages. Unstructured email messages are messages that customers send directly to a company's public email address. Structured email messages are messages that are generated by interacting with a company's Web site. The Web site prompts the customer to enter information into a number of required fields. The entered information is recorded and placed into a structured email message.

Unstructured messages are hard to deal with. Configure email agents to query the database on email Address to recognize the contact to populate the customer information. Script Agent services to parse through the message to identify if it's a new request OR follow-up on existing request. If the request is follow up to existing service request, create its association with that Service Request and change the status/sub-status of SR accordingly with notification to owner OR setting visual identifier in SR Inbox.

A workflow process defines the series of actions you want to occur in the workflow. After the workflow process is triggered, it performs the specified actions. In general, a workflow process consists of one or more process steps, which can be Start steps, decisions, and invocations of component methods, sub processes, or other types of steps. Email support business process can be implemented with processing customer responses through conditional workflows, methods and decision steps. Example: Some workflow step can also parse for the common configurable dictionary word to understand and set the priority and severity of Support Request.

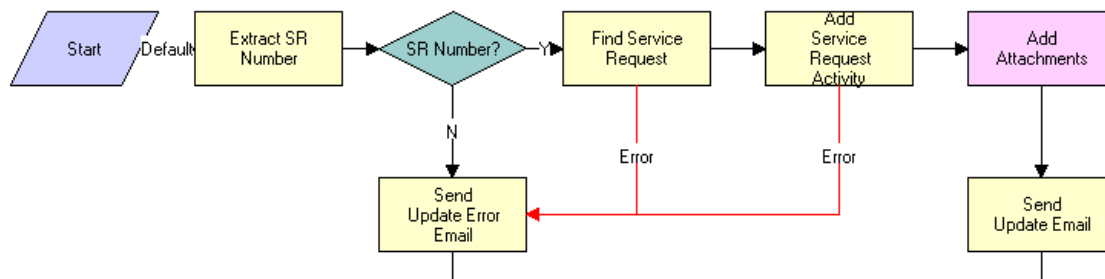


Figure 2: Sample Workflow driven email processing

Natural language processing

NLP technology, a revolutionary concept in linguistic analysis allows organizations to leverage linguistic analysis techniques and content analysis algorithms, thereby eliminating time-consuming analysis and costly manual processing of high volumes of customer email.

Set-up Smart Answer Auto Response (NLP powered) to interpret customer questions, generate correct responses, and send out accurate responses immediately to answer customer questions without any agent involvement. Implement revised and simplified rules of NLP at the beginning and implement complex rules in further stages.

NLP powered "Auto Suggest" capabilities can assist agents in responding to customer inquiries by analyzing the customer request and recommending responses for agent approval. It enables agents to send correct responses in a personalized, professional and timely manner. It also allows organizations to increase global reach by providing automatic and suggested responses in multiple languages.

Advanced Smart Answer can be based on "Artificial Intelligence" self-learning technology that quickly learns how to accurately respond to email messages by observing the behavior of the most skilled customer contact center agents. Moreover, the self-learning technology requires less maintenance than competitive "rules-based" or "keyword-based" systems, because the training of the system simply occurs as agents respond to email messages, rather than through the tedious maintenance of routing and categorization rules.

Smart Answer can be set as background process that never disrupts your agents, but instead enables them to respond to email messages more effectively by automatically suggesting the appropriate response to the customer inquiry.

Intelligent Email Routing and Queuing

"The Right Agent for the Right Customer at the Right Time"

Intelligent Routing Queuing and assignment

As email volume continues to grow, manually routing messages to agents is not effective. ERMS Auto assignment component resolves this problem by automatically routing inbound email messages to the appropriate agent.

Auto assignment, workflow processes provide the ability to automatically route and queue each message based on any combination of agent availability, agent skills, customer profile, and other service level related metrics. This ensures that each message is routed to the right agent, with the right skills, at the right time. Auto assignment component accomplishes this function by matching candidates to predefined and user-configurable assignment objects. To assign the most qualified candidate to each object, Assignment Manager applies assignment rules that you define.

For you to define assignment rules, you select:

- Rule Groups to which each assignment rule applies (optional)
- Criteria for each assignment rule
- Values for each assignment criteria
- Skills to match assignment rules, objects, organizations, employees, and positions
- Expertise to weigh skill scores
- Scores for each assignment rule, criteria, and value
- Candidates that are scored using the assignment rule
- Workload rules to balance work across your organization

You can also configure the way auto assignment component makes assignments by:
Defining how attributes are matched by using:

- Inclusion and exclusion methods
- Different comparison methods
- Wildcard values

Creating and configuring your own components, including:

- Assignment criteria
- Criteria values
- Assignment attributes

Running Assignment Manager in different operation modes to process assignments:

- Interactively in real time
- Dynamically when database changes are made by connected or mobile users
- Periodically assigning objects in batches

Empowering Service Representative:

Dynamic Response Templates

Empower Service representative with personalized, easy-to-administer response templates that simplify the task of drafting responses to incoming emails. By choosing from a list of pre-defined response templates, contact center agents can respond to customer emails in an efficient, accurate, and professional manner. Response templates can dynamically incorporate data from within database as well as data external data.

Spell Check

To ensure all customers facing text communications messages are professional and free of spelling errors, system should provide a spell checking capability. This Spell Checking engine can be automatically invoked when an agent sends an email message. This module includes dictionary files for most common international languages.

Management Reporting and Analysis

Reports and Executive Information System (EIS) enable email management professionals to dynamically visualize information in a variety of online graphical formats. These charts help companies analyze email trends, including volume, status by owner/manager/team, priority, symptom and resolution, volume by product, volume by customer, and dozens more.

ERMS analysis is a pre-configured analysis application focused on customer service, field service, and customer satisfaction analysis. It enables managers to measure customer service levels quickly and easily and includes in-depth analyses on areas such as customer satisfaction, resolution times, and most frequently serviced products.

Handy Knowledge Base sharing with agents

This is, perhaps, the most important tip of all. You'll discover that a comprehensive, up-to-date knowledge base is the answer to most of your service problems. Create a knowledge base that is easy to use and make it available—possibly even mandatory—across all communication channels. A common knowledge base means less knowledge creation effort as well as consistent customer service across agents and geographies. Start small. Analyze customer queries to identify simple, frequently asked questions (FAQs). Create high-quality responses for these questions. FAQs, typically, take care of almost 80% of customer queries—your agents can now focus on more complex and high-value inquiries.

Create articles for not just the body of the email, but also other parts such as header, greeting, signature, and footer. Ideally, an agent should have to simply mix and match available information and not create new content while answering emails. Set up your knowledge base such that content can be automatically personalized when the email is sent. This is particularly useful when agents reply to multiple customer emails with a single response. Associate keywords with each knowledge base article. This will make it easier to both searches the knowledge base for information as well as gain insight into customer issues.

Auto Suggestion, Sales Escalation and State Model Capability

Customer email may have spelling or grammatical errors or contain multiple unrelated questions in an inquiry. NLP technology must be able to decipher free form, imperfect, and complex content from customers and intelligently suggest responses to agents.

While serving customer, service representative may find request that is supported in different product or product upgrade. Service Rep can escalate the lead to sales OR marketing group for further follow-up.

The state model provides a data-driven method for extending workflow control based on the status of an object such as a service request or a product defect. A state model is the blueprint of acceptable states and state transitions that the state machine enforces. It capturing the entity state change and perform pre-defined action. State model can be very crucial in implementing customer features that allows notification to sales team about their prospective or high profile customer's service request.

Product Defects/Requests- Management Escalation/ Permissions

Service professionals can record defects/change/enhancement requests against a product or a specified component of a product, allowing the organization to assess the quality of a product. Using change management, product managers can prioritize problems, identify problem trends, correct defects during any stage of the product cycle, and estimate correction costs.

Customer support is layer 1 to get the feedback and suggestions from customer. Ensures client requests are heard and considered. It allows product management to report aggregate statistics on the frequency and urgency of requests. Also provides the necessary links to Contacts, Accounts, and Service requests.

Super user permission to access, handle and delegate other Service representatives request when representative is not available or overloaded to serve the request. Configurable bells for getting attention on arrival of new request for criteria based scenario.

Make Complete Customer info available to Agents:

Agents need complete information about customers through a simple user interface to be able to create rapid and satisfactory responses. Provide agents easy access to account and billing information, and interaction history of customers. Set up quick access to external data sources that agents frequently refer to while responding to inquiries. For example, a retail business that gets many shipping-related queries could provide its agents with a quick link to UPS tracking systems. In a multi-channel service environment, create an enterprise-wide view of the customer. A common customer information base allows customers to switch channels without starting all over again. In addition, it saves organizations significant amounts of handling time and effort.

Reference:

<http://supportweb.siebel.com>

<http://www.egain.com>

<http://siebel.ittoolbox.com>

<http://www.gartner.com>

<http://www.destinationcrm.com>

<http://www.customerrespect.com>