RingCentral

HOW TO LAUNCH A CALL DEFLECTION STRATEGY

Improve your customer experience and streamline your contact center activity by deflecting calls to digital channels.

INTRODUCTION

The use of digital channels for **customer service** is becoming more widespread and offers many advantages: **time saving, alignment with customer habits, and access to the history of interactions**.

The telephone and 1-800 numbers have been the predominant channel for customer service. They remain widely used by default when it is the only visible means of contacting the business. Once **digital channels** have been added to your mix it is essential to promote them so that customers know about them and use them.

Call deflection is when you offer a customer an alternative digital channel either before or during a call. This strategy improves the customer experience by making it easier to manage high volume of incoming calls and long wait times and deflect a portion of those calls to more efficient digital channels

Call deflection can help reduce high call volumes and long wait times.

In this white paper, you will find all the essential tips to launch your call deflection strategy:

- For what objectives is this strategy relevant?
- How to implement it at the right stages?
- What channels to use to divert calls?

SUMMARY

TO BE SUCCESSFUL, A CALL DEFLECTION STRATEGY MUST HAVE CUSTOMER SATISFACTION AS A PRIORITY.

WHAT IS CALL DEFLECTION? 01

1. Integration into the customer journey

Your customer's journey is the set of steps that your customer takes when interacting with your company. In a customer service context, these are the different steps to obtain an answer to a question, or to have a problem solved. These can vary depending on the type of customer and their needs.

When customers need to reach out for support, they often are faced with obstacles to get help. Usually, after finding your **Contact Us page,** they can reach out to solve their problem with different options, the most common ones being:

Email	Telephone	Live-Chat	FAQ	Social	Messaging

Each of these channels offer a **different customer experience**, and they are not all managed in the same way. And customers' expectations on response times vary with different channels.

Understanding your customer's journey to get support is key to knowing which channel to offer at the right time to guarantee a great customer experience.

Call deflection must be carefully introduced to your customers. It is essential to ensure that it makes sense to the customer, and will **provide high engagement and a good return on investment.**

2. Offering the choice of different channels

So how do you know what channels to deflect call to? The criteria used to choose a channel are often very different, between the brand and the customer.

On the one hand, customers choose a channel based on their habits and convenience. Perhaps they are active on Facebook but not Twitter. Or they prefer texts to emails. On the other hand, companies might only offer phone and email and are focused on ways to **reduce interaction costs and maximize first-contact resolution.**

When launching a call deflection strategy, there is a risk that the company will pursue its goals without considering the customer's expectations.

We know, customers don't like **long wait times, redundant IVRs, or repeating themselves**. It's important to find what channels your customers are using today and adopt those digital channels in your strategy.
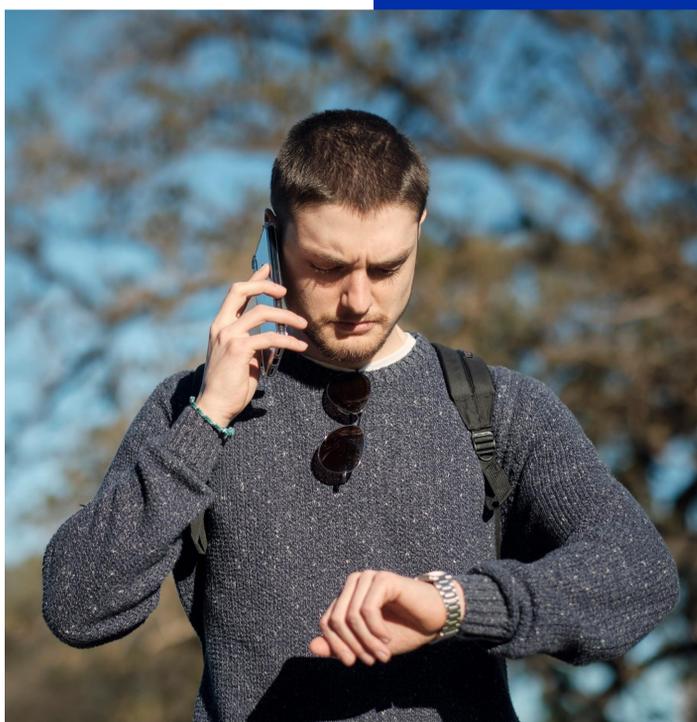
73% of clients

find that waiting time is the main frustration when calling customer service

Source: RingCentral

3. Call Deflection vs other strategies

Call deflection is a technique used to **transfer an incoming customer call to an alternate channel**. These alternate channels are generally digital like email, live chat or messaging. It can be more cost effective for the business and more convenient for the customer.

The goal is to provide alternatives to calls, not to avoid interaction with a customer. Call deflection should not be confused with the following techniques:

Call forwarding

These redirects remain on the telephone channel. This is not a diverted call. For true call deflection, the customer must be offered to switch to a channel other than the telephone.

Avoidance of calls

The goal is not to receive any calls. On the contrary, with call deflection, reducing the number of calls is a consequence, not the objective.

VoIP forwarding to another terminal

As with call forwarding, if there is no other channel offered, it is not a call deflection.

4. Why deflect the calls?

Before deploying a call deflection strategy, be clear on the objectives you are looking to accomplish. Although the vision of customer service is evolving, it is still often seen as a cost center that companies tend to want to reduce.

Phone calls are generally more expensive than digital channels, according to McKinsey, adopting the digital channels can **reduce costs by up to 40%**.

This sometimes leads companies to implement strategies that degrade the customer experience. For example hiding the phone number, artificially increasing the wait time or restricting customer service hours.

In some situations, the **customer experience is not optimal over the phone** and it is better to offer another channel. Or perhaps your customers **prefer to communicate via social networks** than phone calls. These are just a few reasons why call deflection might be a good strategy to implement.

Example: Challenges of trying to pay by phone

The customer must trust the agent by giving him their credit card number	If the agent misunderstands certain numbers, the payment will be refused	If the customer is in a public place, they will not be able to give their confidential information

To improve this experience, the company can direct the customer to a web payment interface. This makes it possible to process the request more quickly, guarantee a high level of customer safety and maximize their satisfaction.

There are many operations that are easier to perform on digital channels such as signing contracts, sending documents and filling out complex forms.

Another reason for deploying call deflection is to **reduce call abandonments.** Calls are synchronous interactions—meaning once the user has dialed a number, they must wait for an agent to pick up. If the call is interrupted, there is no way to resume it during the conversation, the customer must start the entire process over.

Switching to an **asynchronous channel solves this problem**: the customer no longer has to wait, they can send their message at any time and be notified when the company has responded. In addition, the history of messages is saved, which helps to keep context and avoid them having to repeat themselves.

SYNCHRONOUS VS ASYNCHRONOUS

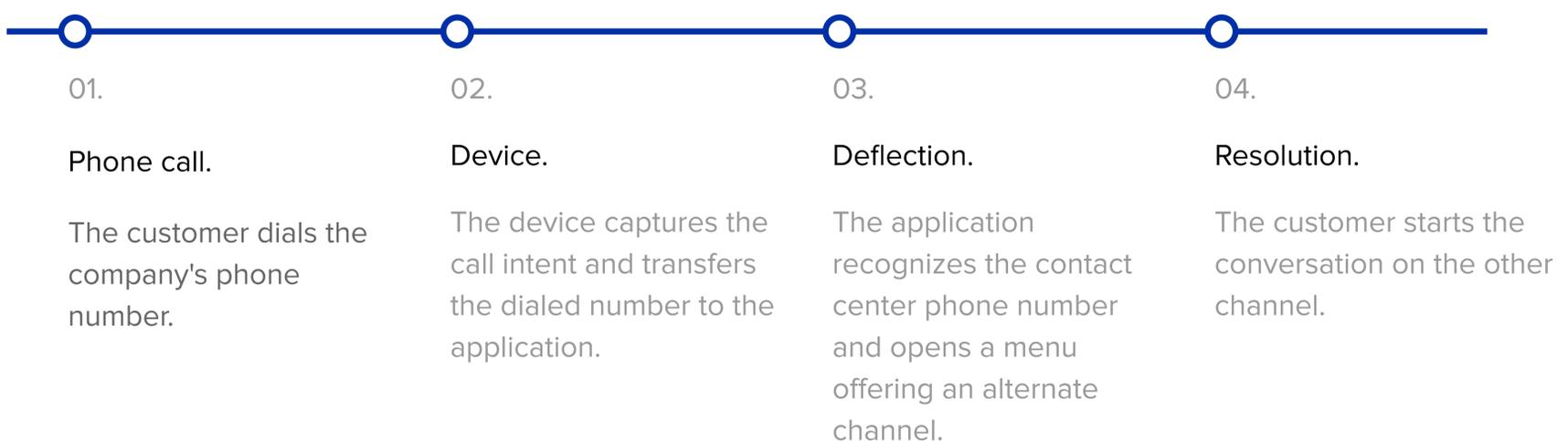| SYNCHRONOUS	ASYNCHRONOUS
Real time	Real or Delayed Time
Session expires after a delay	Continuous conversation without time limit
One task at a time	Multitask
Loss of history after interaction	Trade history

HOW DOES CALL DEFLECTION WORK?

1. Before the call

In this method of call deflection, you want to deflect a call before it even happens. The intention of calling can trigger the deflection, which is handled by the customer's device.

01.

Phone call.

The customer dials the company's phone number.

02.

Device.

The device captures the call intent and transfers the dialed number to the application.

03.

Deflection.

The application recognizes the contact center phone number and opens a menu offering an alternate channel.

04.

Resolution.

The customer starts the conversation on the other channel.

If the customer doesn't have the channel you offer installed their customer, they will be prompted to download the app of channel on their device.
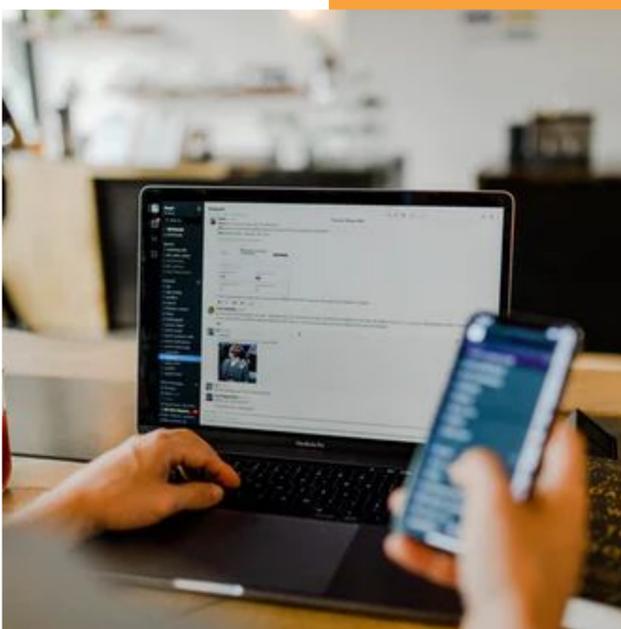
This approach differs from call avoidance because the company suggests an alternative channel, but leaves the option for the customer to make a call.

With different smartphones, there are certain ways of implementing call deflection depending on the device. It is possible to set up the call deflection on the following environments:

Android

A redirection can be set up via a mobile application. It is subject to validation by the Play Store and must bring added value to the customer while respecting their confidentiality.

iOS

The best way is to use Apple Chat Suggest, available for companies that have adopted Apple Business Chat. This allows the customer to contact the brand through Apple Messages, rather than making a call.

Web/Javascript

Intent to call can be detected when the customer clicks on a phone number on the brand's channels (website, app). The company can then offer, at the click of a button, an alternative channel such as live-chat or messaging.

THE CALL DEFLECTION MUST BRING ADDED VALUE TO THE CUSTOMER WHILE RESPECTING THEIR CONFIDENTIALITY.

2. During the waiting time

Not all requests are suitable for call deflection. When Deciding whether or not to deflect the call, it is preferable to rely on the reason for the contact rather than on the just a customer's intention to call.

During the call while the customer is on hold, the way to trigger the deflection is through the **interactive voice response (IVR)**. It can use different parameters to decide when to deflect the call and can be setup to deflect based on the customer's reason for contact.

Offering to deflect the call while on hold allows customers to choose their best option for themselves.

Depending on the wait time, they can decide to use an alternative channel or to continue their call.

For simple support operations updating a password they can tell customers to go to their website and get help via chat. If they have a technical request that requires speaking to an agent, the company may consider the phone to be more suitable and not offer a deflection.

Other internal factors such as the number of agents available should be taken into account when offering an alternative channel.

3. During the call with an agent

In some situations, it's best to only deflect part of the conversation.

When an agent has a customer on the phone, they can trigger a temporary deflection for specific action like payment, authentication, or signature. The action is taken on another channel, then the conversation resumes on the phone.

This strategy requires several technical elements:

- A tool allowing the agent to **trigger call deflection** (integrated or not into existing tools)
- A system to **match the user's identity** on the phone and the digital channel
- A way for the user to **receive the deflection message** on the other channel
- The ability for the agent to **access information** shared on the other channel and continue the call.

Combining a phone call with digital channels optimizes the customer journey

KEY ELEMENTS

1. Define clear objectives

One of the motivations for many companies to implement call deflection is to **reduce costs**. While this is an important aspect of ensuring the sustainability of a business, it is not a customer-centric perspective.

The priority when deploying call deflection must therefore be the customer's experience, like any initiative concerning their journey.
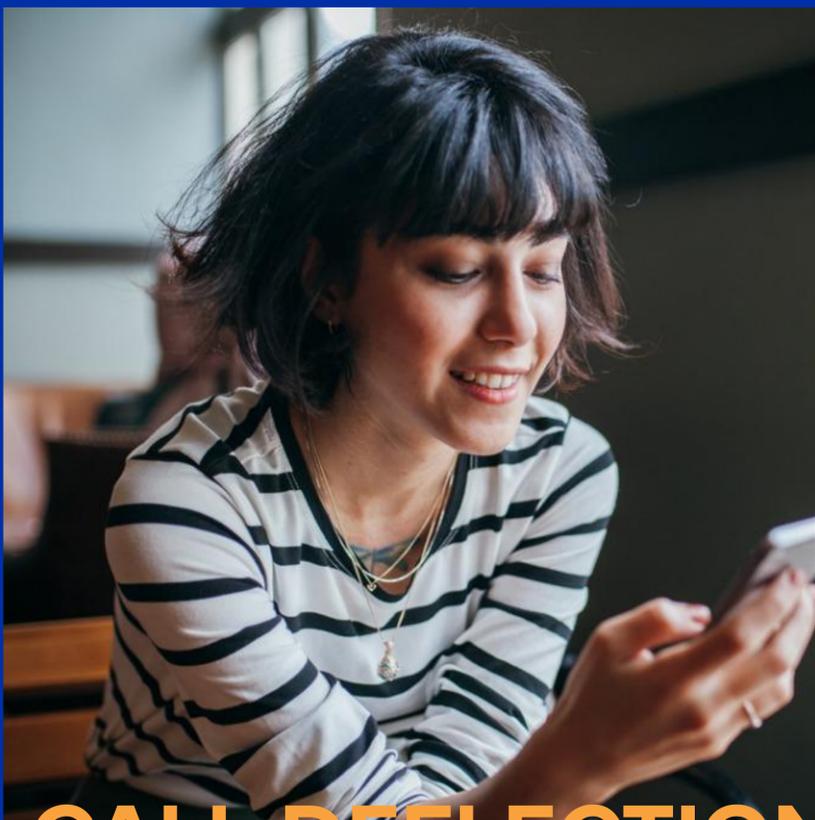
CALL DEFLECTION IS MORE THAN REDUCING COSTS, IT'S ABOUT BETTER CUSTOMER EXPERIENCES.

5. CUSTOMER-CENTRIC OBJECTIVES

1. IMPROVE CUSTOMER SATISFACTION

Digital channels have several advantages that increase satisfaction by up to 20%. Waiting time is reduced and the customer does not have to repeat themselves since agents can access the conversation history.

2. PROMOTE ANOTHER CHANNEL

Call deflection strategies are relevant for highlighting new ways of getting in contact like email, messaging, social networks and the company is in control of directing the flow of requests to them.

3. MANAGE COMPLEX ACTIONS

Payment or electronic signature are poorly suited for telephone interactions. With call deflection, brand's can complete these types of actions more easily and quickly.

4. PROVIDE SERVICE DURING CLOSED HOURS

A call deflection to a digital channel provides let's you offer support 24/7 so customers can get an instant response via a chatbot or self-serve with FAQs or send in email during off-hours.
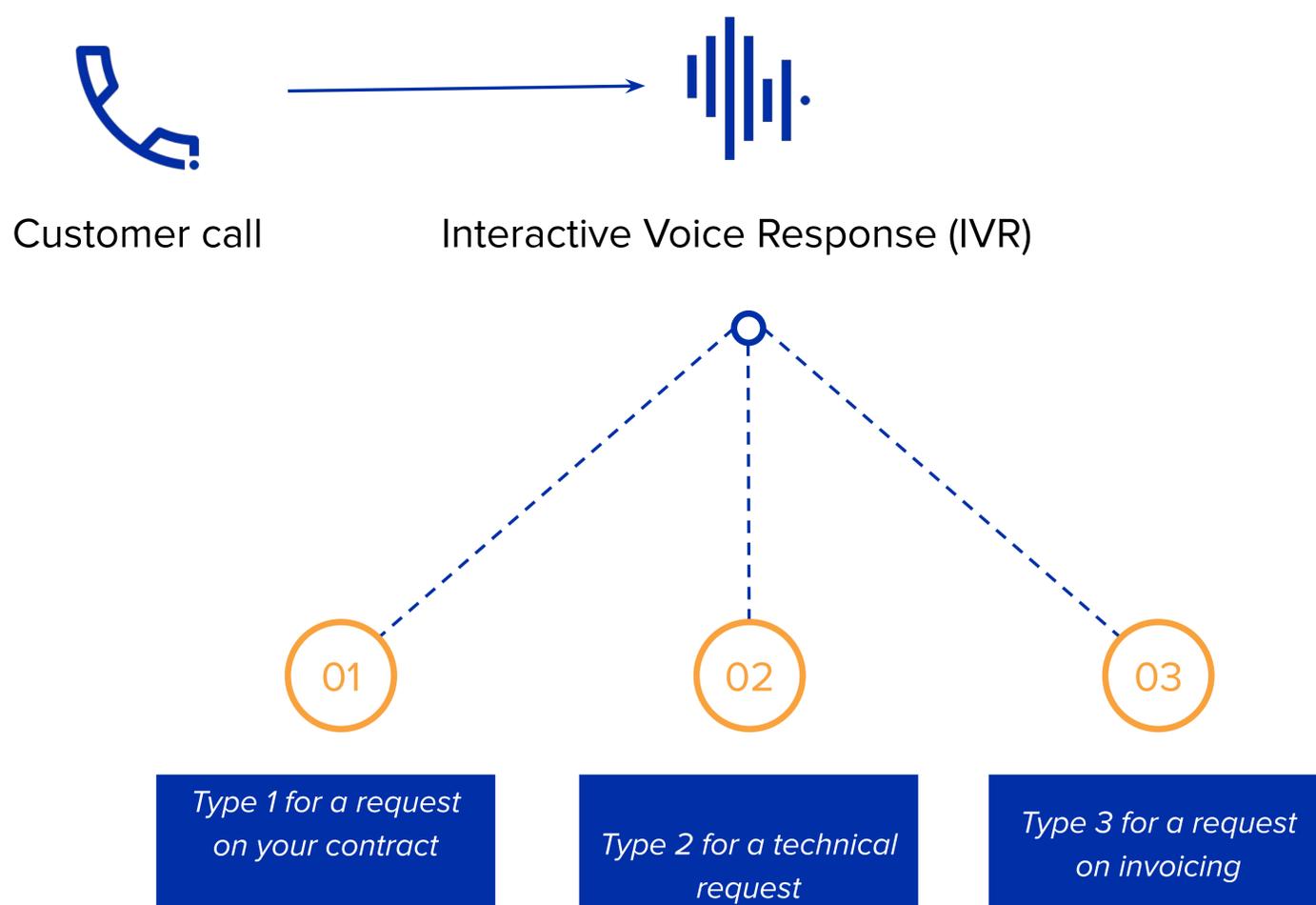
5. MANAGE ACTIVITY PEAKS

When customer service faces a peak in demand and cannot respond to all customers within the usual timeframe, the brand can offer digital channels as an alternative to manage heavy flows of interactions.

2. Rethinking the IVR tree

Since the deflection point is often managed within the IVR, its location must be chosen with careful consideration. For example, it is not recommended that the deflection be the first action offered to the customer during their call. You should give the customer more context so that they understand why this channel is offered to them, and how it improves their experience.

It may be more relevant to **offer different channels for specific contact reasons** including technical problems, sales information, billing or invoicing questions or even offering a channel to specific customers like VIP customers. To do this, it is possible to rely on CRM information to define the best time and channel to divert a contact.

Example of a standard IVR tree

Customer call

Interactive Voice Response (IVR)

01

02

03

Type 1 for a request on your contract

Type 2 for a technical request

Type 3 for a request on invoicing

3. Use conversation history

Forgetting previous interactions and asking for information they have already shared are the most common ways to give the customer a bad experience.

Whenever possible, when implementing a call deflection strategy, **avoid having the customer repeat themselves** and provide the agent with context to help resolve issues fast.

89% OF CLIENTS
SAY THAT HAVING TO REPEAT INFORMATION DEGRADES THEIR EXPERIENCE
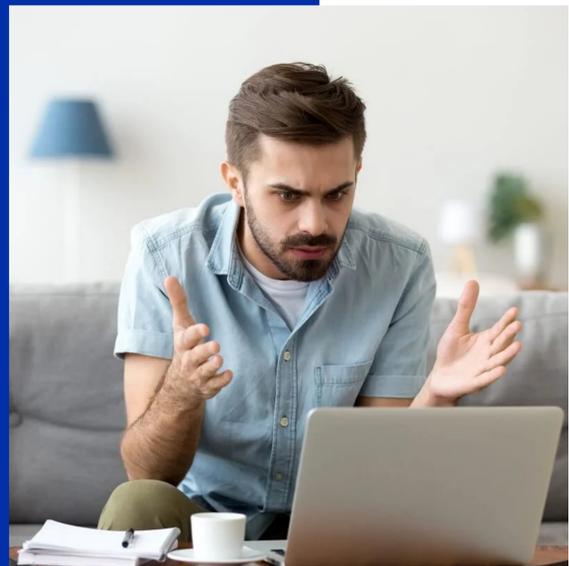
Source: Accenture

The context represents all of the user's information and history with the brand and can include **user identities, previously visited pages, and contact reasons**.

This type of information is often stored in a CRM. When switching between channels, the context can be taken into account and sent to the agent via a secure token.

In addition, the agent (or chatbot) who manages the contact on the new channel can respond to the request in a more relevant way because they know that the user has already been deflected from a call.

4. Know your customer's preference

The deflection capabilities are highly dependent on the source of interaction or device used. Knowing which channels to deflect calls to can be tricky and may vary depending on your customers. Variables such as country, age and occupation can determine the differences in the types of device and channels used.

When setting up a call deflection system, it is best not to assume that all customers have a recent smartphone with an unlimited data plan. **Analyze the types of devices used and the data capacities** to adapt to the specifics of your customers and to provide the best possible experience.

5. Measure the results

As with any change in a system or a business, the launch of the call deflection must be **measured to know the impact of the changes** on your performance, customer behavior and their experience in general.

The key metrics most often used to measure customer service:

Net Promoter Score
(NPS)

Client Satisfaction
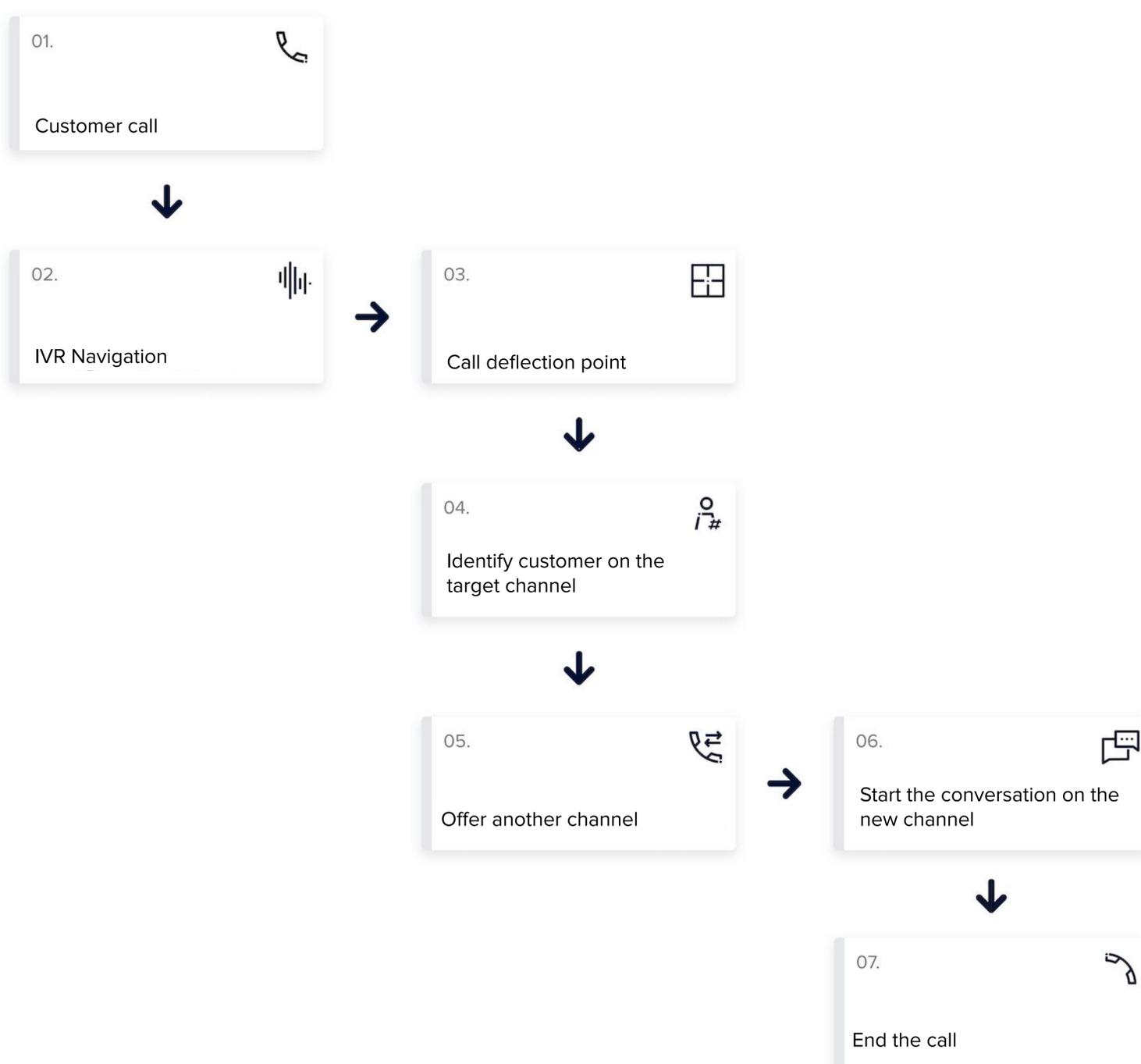(CSAT)

First Contact
Resolution (FCR)

Average Resolution
Time

WHAT CHANNELS CAN CALLS BE FORWARDED TO?

Now that you know about call deflection and its objectives we can explore how to implement it on multiple channels. The requirements to initiate call deflection are as follows:

- **Match the phone number with their identity on the new channel**
- **Ability to direct the user to this alternative digital channel**

The graphic below can be used for any implementation of call deflection, regardless of the target channel.

```
01.                    📞
Customer call
        ↓
02.                    ᵢₗₗᵢₗ          →      03.                    ⊞
IVR Navigation                              Call deflection point
                                                    ↓
                                            04.                    👤#
                                            Identify customer on the
                                            target channel
                                                    ↓
                                            05.            📞↹     →    06.              💬
                                            Offer another channel          Start the conversation on the
                                                                           new channel
                                                                                    ↓
                                                                           07.              📞
                                                                           End the call
```

1. Text / SMS

SMS is a channel often used for call deflection because it is versatile. **SMS is reliable, fast, can integrate text and links,** and does not require consuming mobile data. This channel is often associated with self-service, as it is a means of providing links to the FAQ or a forum.

The implementation process is also one of the easiest. The main action is to retrieve a mobile phone number allowing the sending of SMS. The HLR lookup process verifies the validity of the phone number before starting a conversation.

2. Facebook Messenger

Facebook Messenger is one of the most widely used messaging channels for businesses. To offer call deflection, the biggest challenge is to detect the identity of the user on Facebook from their phone number. There are several ways to do this:

- **Customer matching:** this function allows you to contact a customer via their phone number, if they have entered it in Facebook.
- **M.me links:** these URLs, which can be sent by SMS for example, allow the customer to open and start a Messenger conversation directly with the company.
- **24 hour response time:** A company is allowed to send messages in an already existing conversation with a customer within 24 hours of the last user action on that conversation.

3. Apple Business Chat

Apple Business Chat is a service that allows a brand to communicate directly with its customers through the Apple Messages app. It is available on iOS devices for versions above 11.3.

Similar to Facebook Messenger, a company can send a link to help the user start a conversation. When customers clicks on the URL, it redirects them to Apple Messages to start a conversation with the company.
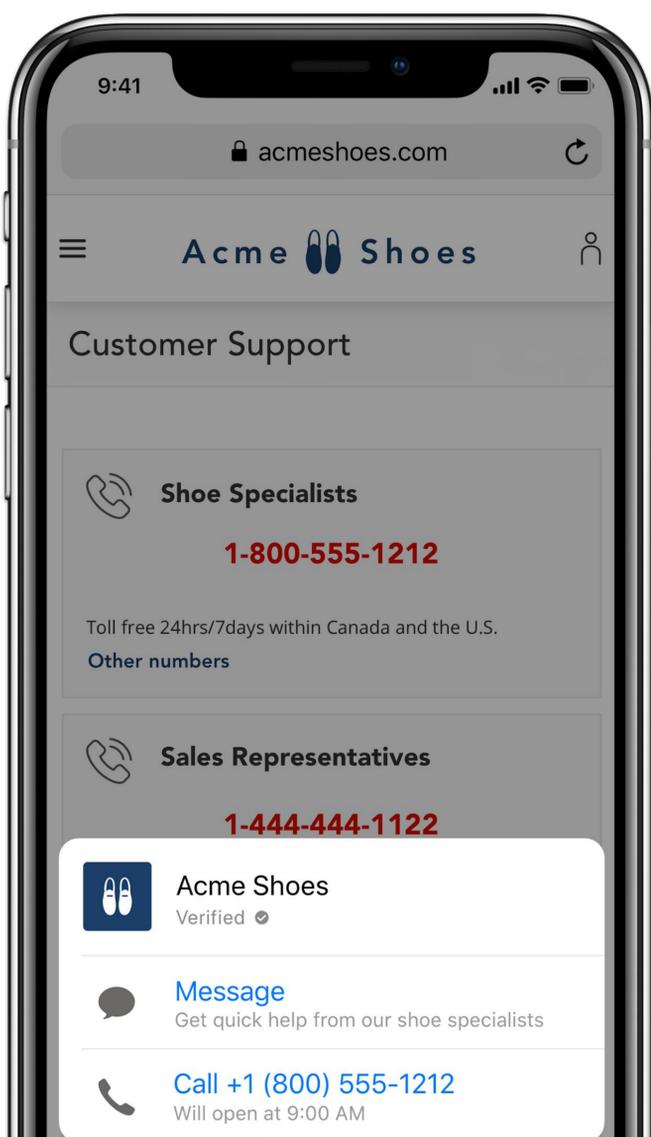
Apple Chat Suggest allows customers to be redirected to an alternative channel before their call.

**When clicking on a brand's phone number using Apple Business Chat, the customer is given the option to initiate a conversation in the Messages app.**

4. WhatsApp

WhatsApp allows businesses to communicate with their customers through a verified account on **WhatsApp Business Solution**.

WhatsApp offers the company the possibility to confirm that a customer is registered on this channel and to retrieve their ID. Once the IVS understands the intent to divert, the point of contact can be used to verify that the phone number belongs to a valid WhatsApp account. Once this step is confirmed, a message template is sent to the customer to start the conversation.
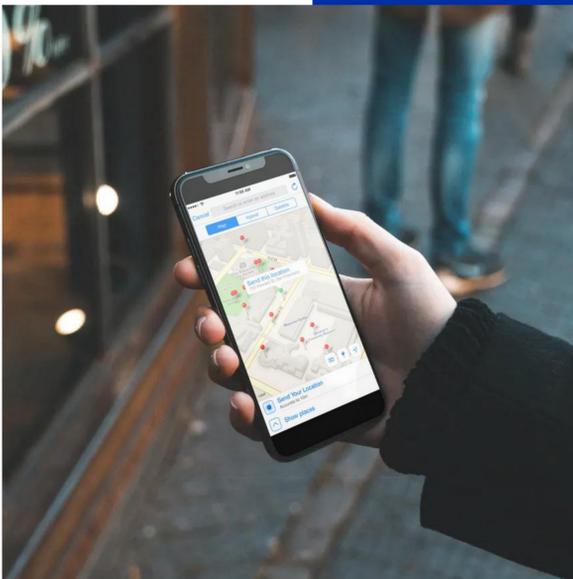
WhatsApp allows you to communicate with customers on any type of smartphone, with end-to-end encryption

Manage call deflections with RingCentral

An omni-digital platform such as RingCentral Engage Digital centralizes the management of all digital channels, including those enabling a call deflection strategy.

Engage Digital can be used as a central solution to deploy call deflection on digital channels and to track the results with a unified dashboard.

RICH FEATURES

Support for structured messages and message templates.

MERGING IDENTITIES

Consolidate customer profiles on different channels

CHATBOTS

Automate interactions and allow transfers between a virtual agent and a live agent

ROUTING

When deflecting calls to digital channels, ensure they reach the right teams.

CONCLUSION

Call deflection is an essential strategy to support the transition of telephone interactions to digital channels. When implemented in a relevant way in the customer journey, this approach can both improve the customer experience and streamline the support efforts.

Centralizing all digital channels into one place is an essential step, both to implement the deflection and to prepare for the growth of digital interactions.

Contact us to find out how we can help you set up your strategy and to get more information on the technical aspects.
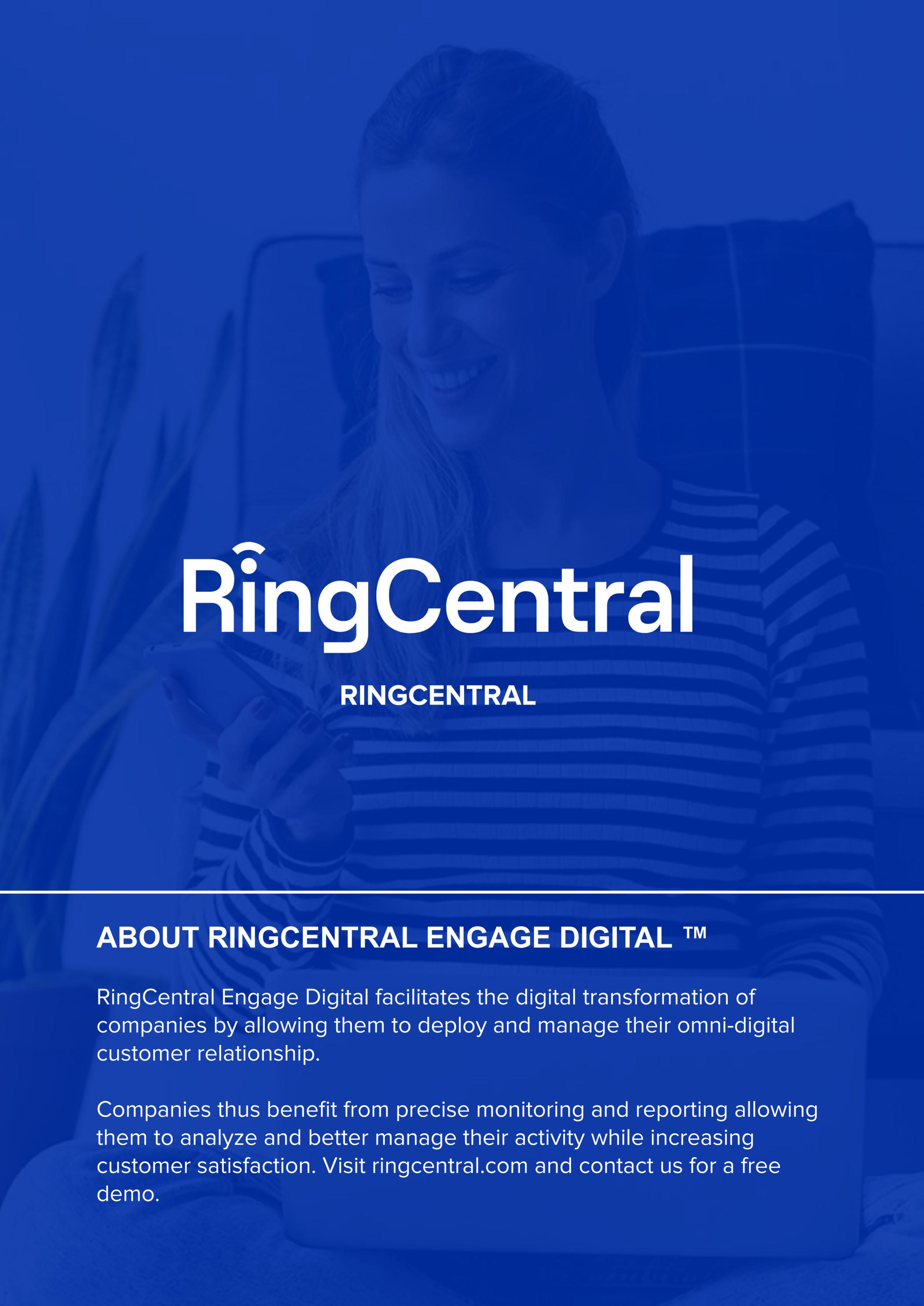
POINTS TO REMEMBER

01.

Call deflection improves the customer experience

02.

Interactions are made easier thanks to asynchronous communications

03.

Centralizing your digital channels is essential for success

RingCentral

RINGCENTRAL

ABOUT RINGCENTRAL ENGAGE DIGITAL ™

RingCentral Engage Digital facilitates the digital transformation of companies by allowing them to deploy and manage their omni-digital customer relationship.

Companies thus benefit from precise monitoring and reporting allowing them to analyze and better manage their activity while increasing customer satisfaction. Visit ringcentral.com and contact us for a free demo.