

LEARNING MADE EASY

RingCentral 2nd Special Edition

# Next-Gen Cloud Contact Centers

for  
**dummies**<sup>®</sup>  
A Wiley Brand



Create a digital-first  
customer experience

—  
Increase customer  
satisfaction and engagement

—  
Transform a cost center  
into a profit center

Brought to  
you by

**RingCentral**<sup>®</sup>

Lawrence Miller

## About RingCentral

RingCentral, Inc. (NYSE: RNG) is a leading global provider of AI-first cloud-based business communications and collaboration that seamlessly combines phone system, messaging, video, webinars and hybrid events, and contact center. RingCentral empowers businesses with conversation intelligence, and unlocks rich customer and employee interactions to provide insights and improved business outcomes. With decades of expertise in reliable and secure cloud communications, RingCentral has earned the trust of millions of customers and thousands of partners worldwide. RingCentral is headquartered in Belmont, California, and has offices around the world.

# Next-Gen Cloud Contact Centers

**for  
dummies**<sup>®</sup>  
A Wiley Brand



# Next-Gen Cloud Contact Centers

RingCentral 2nd Special Edition

**by Lawrence Miller**

for  
**dummies**<sup>®</sup>  
A Wiley Brand

# Next-Gen Cloud Contact Centers For Dummies®, RingCentral 2nd Special Edition

Published by  
**John Wiley & Sons, Inc.**  
111 River St.  
Hoboken, NJ 07030-5774  
www.wiley.com

Copyright © 2024 by John Wiley & Sons, Inc., Hoboken, New Jersey

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without the prior written permission of the Publisher. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at <http://www.wiley.com/go/permissions>.

**Trademarks:** Wiley, For Dummies, the Dummies Man logo, The Dummies Way, Dummies.com, Making Everything Easier, and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc. and/or its affiliates in the United States and other countries, and may not be used without written permission. All other trademarks are the property of their respective owners. John Wiley & Sons, Inc., is not associated with any product or vendor mentioned in this book.

LIMIT OF LIABILITY/DISCLAIMER OF WARRANTY: THE PUBLISHER AND THE AUTHOR MAKE NO REPRESENTATIONS OR WARRANTIES WITH RESPECT TO THE ACCURACY OR COMPLETENESS OF THE CONTENTS OF THIS WORK AND SPECIFICALLY DISCLAIM ALL WARRANTIES, INCLUDING WITHOUT LIMITATION WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE. NO WARRANTY MAY BE CREATED OR EXTENDED BY SALES OR PROMOTIONAL MATERIALS. THE ADVICE AND STRATEGIES CONTAINED HEREIN MAY NOT BE SUITABLE FOR EVERY SITUATION. THIS WORK IS SOLD WITH THE UNDERSTANDING THAT THE PUBLISHER IS NOT ENGAGED IN RENDERING LEGAL, ACCOUNTING, OR OTHER PROFESSIONAL SERVICES. IF PROFESSIONAL ASSISTANCE IS REQUIRED, THE SERVICES OF A COMPETENT PROFESSIONAL PERSON SHOULD BE SOUGHT. NEITHER THE PUBLISHER NOR THE AUTHOR SHALL BE LIABLE FOR DAMAGES ARISING HEREFROM. THE FACT THAT AN ORGANIZATION OR WEBSITE IS REFERRED TO IN THIS WORK AS A CITATION AND/OR A POTENTIAL SOURCE OF FURTHER INFORMATION DOES NOT MEAN THAT THE AUTHOR OR THE PUBLISHER ENDORSES THE INFORMATION THE ORGANIZATION OR WEBSITE MAY PROVIDE OR RECOMMENDATIONS IT MAY MAKE. FURTHER, READERS SHOULD BE AWARE THAT INTERNET WEBSITES LISTED IN THIS WORK MAY HAVE CHANGED OR DISAPPEARED BETWEEN WHEN THIS WORK WAS WRITTEN AND WHEN IT IS READ.

For general information on our other products and services, or how to create a custom *For Dummies* book for your business or organization, please contact our Business Development Department in the U.S. at 877-409-4177, contact [info@dummies.biz](mailto:info@dummies.biz), or visit [www.wiley.com/go/custompub](http://www.wiley.com/go/custompub). For information about licensing the *For Dummies* brand for products or services, contact [BrandedRights&Licenses@Wiley.com](mailto:BrandedRights&Licenses@Wiley.com).

ISBN 978-1-394-25679-2 (pbk); ISBN 978-1-394-25680-8 (ebk)

## Publisher's Acknowledgments

Some of the people who helped bring this book to market include the following:

**Editor:** Elizabeth Kuball

**Production Editor:** Pradesh Kumar

**Acquisitions Editor:** Traci Martin

**Special Help:** Andy Watson,  
Michael Frearson

**Editorial Manager:** Rev Mengle

**Client Account Manager:**  
Cynthia Tweed

# Table of Contents

INTRODUCTION .....	1
About This Book .....	1
Foolish Assumptions .....	2
Icons Used in This Book.....	2
Beyond the Book.....	2
<b>CHAPTER 1: Defining the Next-Gen Cloud Contact Center .....</b>	<b>3</b>
Looking at the Evolution of Cloud Contact Centers .....	3
Understanding Different Use Cases.....	4
Recognizing the Benefits of a Next-Gen Cloud Contact Center.....	5
Increasing customer satisfaction .....	5
Providing valuable business insights.....	6
Supporting a hybrid work approach .....	6
Boosting agent productivity .....	6
Reducing operating costs.....	7
Reducing agent churn .....	7
Widened talent pool of agents .....	8
<b>CHAPTER 2: Taking Stock of the World Today .....</b>	<b>9</b>
Looking at Location-Agnostic Modes of Work .....	9
Going beyond Voice .....	11
Integrating Unified Communications and Contact Center Technologies .....	12
<b>CHAPTER 3: Understanding AI and the Future of Cloud Contact Center Technology .....</b>	<b>15</b>
Deploying Contact Center Technologies .....	15
Artificial intelligence .....	16
Chatbots.....	16
Automation.....	17
Looking at Contact Center Operations .....	18
Recognizing the Customer-Centric Role of the Contact Center .....	19

**CHAPTER 4: Going beyond Metrics with Analytics** ..... 21

    Measuring Success in the Contact Center ..... 21

    Understanding Today’s Contact Center KPIs ..... 23

    Defining the Customer Experience ..... 25

**CHAPTER 5: Getting Started with a Next-Gen Cloud Contact Center** ..... 29

    Defining a Maturity Model ..... 29

    Assessing Your Current State ..... 30

        Customer experience ..... 30

        Agent productivity..... 32

        Overall strategy ..... 36

    Moving Your Contact Center Forward ..... 39

**CHAPTER 6: Ten Takeaways for Your Next-Gen Cloud Contact Center** ..... 41

# Introduction

Customer expectations are constantly evolving. Today's consumers expect outstanding on-demand service from the organizations they do business with, using the channels they prefer (including voice, video, text, and intelligent virtual agents [IVAs]), with agents that are professional, knowledgeable, and empowered to help them. Remote and hybrid work structures are creating new opportunities and challenges for businesses to keep up with demand and consistently deliver an exceptional customer experience.

Meanwhile, technological capabilities continue to evolve, increasing capacity and scalability. Artificial intelligence gives businesses the power to achieve levels of responsiveness and personalization they've never had before.

In this book, you find out how a next-gen cloud contact center can help your organization deliver the experiences your customers demand, what a modern cloud contact center looks like, and how you can implement the contact center of the future in your organization today.

## About This Book

*Next-Gen Cloud Contact Centers For Dummies*, RingCentral 2nd Special Edition, consists of six chapters that explore the following:

- »» The evolution of the contact center, different use cases, and the benefits of a next-gen cloud contact center (Chapter 1)
- »» The changing world of work, communication, and collaboration (Chapter 2)
- »» Next-gen cloud contact center technologies (Chapter 3)
- »» The value of analytics for your contact center (Chapter 4)
- »» How to get started with a next-gen cloud contact center (Chapter 5)
- »» Key takeaways of your next-gen cloud contact center (Chapter 6)



Each chapter is written to stand on its own, so if you see a topic that piques your interest feel free to jump ahead to that chapter. You can read this book in any order that suits you (though I don't recommend upside down or backward).

## Foolish Assumptions

It has been said that most assumptions have outlived their usefulness, but I assume a few things nonetheless!

Mainly, I assume that you are an IT decision maker or a contact center manager and you're evaluating business communications solutions for your organization's contact center. Beyond an understanding of your business requirements and a basic awareness of cloud computing and other key technology trends and challenges, I don't assume any deep technical knowledge. As such, this book is written primarily for nontechnical readers.

## Icons Used in This Book

Throughout this book, I occasionally use special icons to call attention to important information. Here's what to expect:



REMEMBER

This icon points out important information you should commit to your nonvolatile memory or your noggin!



TIP

Tips are appreciated, but never expected, and I sure hope you'll appreciate these useful nuggets of information.

## Beyond the Book

There's only so much I can cover in this short book, so if you find yourself at the end of this book wondering, "Where can I learn more?," just go to [www.ringcentral.com](http://www.ringcentral.com).

## IN THIS CHAPTER

- » Looking at the changing nature of the contact center
- » Recognizing different business use cases for contact centers
- » Realizing the benefits of a next-generation cloud contact center

# Chapter 1

# Defining the Next-Gen Cloud Contact Center

In this chapter, you find out how traditional call centers have changed and why you need a next-gen cloud contact center, different contact center use cases, and the benefits of the next-gen cloud contact center.

## Looking at the Evolution of Cloud Contact Centers

In the not-too-distant past, on-premises call centers were a necessary fixture of practically any business, large or small, in every industry. Whether staffed by a handful of employees who simultaneously performed a number of other job responsibilities or by hundreds of full-time call center agents in large cubicle farms, call centers were an important part of the customer journey. Many of these traditional call centers slowly began implementing new communications capabilities and channels, such as email and chat, to become contact centers offering customers a choice in how they interacted with the business.

Today, contact centers have become the center of all customer interactions for many businesses. Legacy call centers and contact centers with limited capabilities are unable to support evolving customer needs. Successful businesses require a new breed of contact center. The next-gen cloud contact center integrates unified communications, contact center software, artificial intelligence (AI), and back-end business systems to bring business experts and contact center agents — regardless of where they're located — together across every channel to deliver superior customer experiences.



REMEMBER

Unified communications (UC) refers to the integration of team messaging, video meetings, and phone. UC also includes text messaging and fax capabilities. UC solutions are also tightly integrated with productivity tools such as email, file/desktop sharing, document storage, and more.



REMEMBER

The next-gen cloud contact center leverages the agility and flexibility of the public cloud to deliver the digital experiences that modern customers demand.

## Understanding Different Use Cases

Businesses operate contact centers for a variety of use cases depending on their industry, business strategy, goals, and more. Here are some common contact center use cases:

- » **Support teams:** Agents on support teams require excellent customer service skills to deal with customers who may be frustrated or highly agitated. Most support team interactions are inbound (that is, initiated by the customer) over a variety of channels — such as voice, email, and chat — although some contact may be outbound, such as in the case of a product recall or proactive customer service call. Support teams also require access to CRM software, ERP, and online product catalogs/information as well as knowledge bases, collaboration tools, and a variety of digital channels, among other tools.
- » **Inside sales:** Inside sales representatives proactively contact potential and current customers to promote a company's products and/or services. Customers may be business-to-business (B2B), business-to-consumer (B2C), or a mix of



REMEMBER

both. Most outbound contacts from inside sales reps are voice-based, but they may include email and Short Message Service (SMS) text messages. Inside sales reps typically require contact center tools such as customer relationship (CRM) software, enterprise resource planning (ERP), order entry systems, and online product catalogs/information.

CRM software is used to manage, improve, or facilitate sales, support, and related interactions with customers, prospects, and business partners.

- » **Internal help desk:** Corporate IT departments typically operate a tier 1 help desk to provide technical support for the company's employees. Delivering an exceptional user experience is critical to minimize user frustration and maximize productivity. Integration with an ITIL-based ticketing system that includes asset management, a configuration management database (CMDB), and other key functionality is critical to empowering help desk agents to solve technical issues for your users.
- » **Marketing groups:** Like business development, marketing groups wear many hats and are often composed of inside sales, support teams, and business development professionals. They require access to all the same contact center tools as their counterparts, but they may also need access to mass marketing email services and a wide variety of digital inbound and outbound channels.

## Recognizing the Benefits of a Next-Gen Cloud Contact Center

Forward-looking businesses can realize a number of significant business benefits with a next-gen cloud contact center. Let's take a closer look at a few of these benefits.

### Increasing customer satisfaction

A next-gen cloud contact center supports the broadest array of digital channels, so your customers use their preferred channels. Self-service capabilities that leverage advanced automation such as intelligent virtual agents (IVAs), natural language processing

(NLP), AI, and machine learning further empower your customers and increase customer satisfaction. Being able to seamlessly switch from a chat session to a phone call when needed further defines the customer experience. Finally, providing your agents with the omnichannel tools they need to get seamless access to information quickly and easily — whether through an online knowledge base or via chat with a subject matter expert — in a single pane of glass helps them help your customers.



REMEMBER

An IVA is an automated software application that can interact with people on voice and digital channels to provide answers or perform actions. *Omnichannel* refers to multiple channels (such as voice, SMS, email, and live chat) that are integrated to deliver a consistent customer experience.

## Providing valuable business insights

A next-gen cloud contact center integrates with your unified communications platform and other back-end business systems to tear down data siloes and deliver intelligent and actionable insights that help you optimize your contact center operations, maximize revenue, and deliver a superior customer experience.

## Supporting a hybrid work approach

Modern contact center technology allows agents to work from anywhere, offering businesses and employees much more flexibility. The best contact center software provides a consistent experience for the agent regardless of whether they're working from the office or working remotely. It also provides all the necessary functionality for contact center leaders, so they can train, manage, and support their teams from anywhere.

## Boosting agent productivity

Though many business owners and contact center managers worry about work getting done from home, increased productivity is often the biggest benefit of a remote team. For example, a study published in the *Harvard Business Review* showed that remote workers accomplished almost a full additional day's worth of work per week when compared to on-site employees. Another study found that 45 percent of remote employees can get more done in less time and 44 percent are less distracted and more productive than they would be at the office.



REMEMBER

Two-thirds of the cost of running a contact center is labor, including salaries, benefits, office space, and so on.

For some agents, the ability to find the best environment and schedule for their needs naturally leads to better work. For others, improved productivity is a way to pay back companies that allow them to work from home.

## Reducing operating costs

Much of the costs associated with a business's overhead go to maintaining physical locations. The biggest cost is real estate, but businesses also have to pay for utilities, furniture, office supplies, cleaning services, Internet access, and more.

Eliminating the need to maintain a physical contact center or downsizing to a smaller one allows you to reduce operational costs to the tools and software you need to connect agents with customers. Plus, a remote setup can also benefit your employees' personal finance needs.

According to *Inc.* magazine, remote workers can save between \$2,100 and \$7,800 annually on food, childcare, travel, and personal items. These savings can reduce your team's stress across the board, contributing to higher job satisfaction and productivity.

## Reducing agent churn

Reducing agent churn has always been a challenge for contact centers. With the dramatic increase in customer inquiry volume at contact centers during and since the pandemic, it's not surprising that agents are more stressed out than ever. They want a more positive experience — one that offers them greater flexibility in where they work and when they work.

Cloud contact centers allow employees to work remotely, giving them the flexibility to work from home or wherever is most convenient. Research from Pipkins shows that agents who work from home have a higher retention rate (80 percent) than those who work only out of a contact center (25 percent).

Additionally, it's easy to schedule agents with a cloud contact center solution, and it's just as easy to shift their schedules if necessary. Flexible scheduling also improves the employee experience, which boosts retention rates and reduces agent churn.

Finally, according to research by McKinsey, engaged and satisfied agents are 8.5 times more likely to stay than leave within a year and, as an added bonus, 16 times more likely to refer friends to their company.

## **Widened talent pool of agents**

When your agent search isn't limited by location or tied to a daily commute, you gain access to a more diverse talent base across the country — or even the world — that can revolutionize the quality, depth, and diversity of your team's abilities.

The flexibility and benefits you can offer with a remote position are also more attractive to the talent you want to attract. A study by FlexJobs and Global Workplace Analytics found that, on average, telecommuters earn \$4,200 more annually than on-site workers in the same position. Greater control over their work also leads to happier and more productive agents, which can then benefit your organization and your customers immensely.

## IN THIS CHAPTER

- » Adapting to the new work normal
- » Enabling a “digital-first” customer experience
- » Leveraging unified communications capabilities in your contact center

# Chapter 2

# Taking Stock of the World Today

In this chapter, you get a look at the challenges and opportunities of remote work, the digital-first experience, and the business benefits of integrating unified communications as a service (UCaaS) and contact center as a service (CCaaS) capabilities.

## Looking at Location-Agnostic Modes of Work

Work is constantly evolving. As technology advances, it helps determine how, where, and when we work. It changes employee and customer experience, shaping expectations in the process.

People are more digitally connected than ever before. Online shopping, remote learning, videoconferencing, cloud computing, and many other digital technologies allow us to stay connected to one another in important ways. These technologies enable businesses to survive and thrive as innovative ways to engage customers and empower employees emerge.



Modern customer engagement software helps businesses of all sizes make customer service a competitive differentiator. Many contact centers are now highly distributed, with hybrid work the prevailing model of operation. Preparing workforces to serve customers in this way demands new tools, tweaks to agents' skill sets, and different management skills.

Cloud-based contact center management platforms point the way forward. In the right hands, they have the potential to redefine the customer experience.

## **CUSTOMER SUCCESS STORY: THE OFFICE GROUP**

The Office Group (TOG) offers fully customized inbound and outbound omnichannel contact center solutions for businesses in any industry. Already an omnichannel engagement platform customer of RingCentral, TOG more recently adopted RingCentral's contact center generative artificial intelligence (AI) capabilities.

Using the platform, TOG is able to efficiently manage any digital channel that a given client needs, whether that's SMS, chat, email, or all three. All those digital channels can be centralized in a single pane of glass and at the same time improve agents' effectiveness.

Customers reliably receive quick responses, from the right people, no matter how they make contact — which, of course, makes TOG clients happy. Not only does it improve customer engagement for clients, it actually helps save them money.

Being able to offer clients of all sizes such a robust enterprise solution is a significant differentiator and allows TOG to provide support solutions that it couldn't provide on its own. Thanks to the platform's intelligent omnichannel capability, TOG offers clients more services, tailored to their businesses, and at a fraction of the cost they'd be paying with another enterprise contact center solution.

What's more, clients who switch to TOG after working with another outsourcing company are often shocked when they discover making simple changes won't take weeks or require them to open a ticket — those requests can be handled for them in minutes.

# Going beyond Voice

Good businesses meet customers wherever they are, and these days, that's online. Today, more commerce takes place via an array of digital channels, giving customers frictionless ways to connect, pay, and, most of all, follow up. The means that customers choose may vary by audience and industry, but the common thread is that the options are more diverse than ever before and will continue to evolve. Flexibility now means adaptability for the future, and this multifaceted approach to customer engagement will only gain momentum in the years to come. A study by Deloitte found that 79 percent of millennials already expect brands to service customers through multiple digital channels. This shift is not limited to retail. As customers increasingly prefer digital engagement, it becomes more urgent for business to cater to this new normal. Whereas customers with an issue with a product or service once dialed up a massive brick-and-mortar call center, teams of remote agents now serve clients through various channels.



REMEMBER

Excellent customer service strengthens your brand, builds loyalty, and has a direct impact on revenue.

In a sign that early investment can pay dividends down the road, Domino's saw their market share double since they transitioned to digital-first customer engagement a decade ago. From better website design to chatbots, apps, and AI robots that simulate human conversations, improved digital engagement reaches out to customers on their terms, boosts efficiency, and gathers data to improve other aspects of your company.

Going beyond voice with a next-gen cloud contact center means creating a digital-first experience that empowers your customers with options that include the following:

- » **Digital channels:** Interactive voice response (IVR) is useful for simple questions and triaging initial contact, which frees up agents to deal with cases requiring more attention. Such sorting saves time and reduces the likelihood that the customer will get passed from one agent to the next. Call deflection also helps shift some call volume to the digital channels of your customers' choice. Offering to handle customer queries via social media message channels or live chat gives agents the chance to handle more than one

customer at a time. Each agent gets more done, which reduces initial wait times and frees up more time to deal with the most complicated customer issues.

- » **Self-service:** Many customers prefer to solve their own problems. A survey by Nuance Enterprise found that 67 percent of customers would prefer not to speak with a customer service representative at all. Well-designed websites can preemptively answer queries about return policies, shipping times, and service disruptions. But even frequently asked question (FAQ) pages tend to lack the specificity needed for addressing more complex issues. Automatic callback allows your customers to schedule a callback without losing their place in line. This gives your customers access to answers when they don't have time to wait on hold, and enables you to connect your customers to the right agent with the right skills.
- » **AI and automation:** Automation features support self-service options and help lighten the administrative load on agents, freeing them up to solve queries requiring greater cognition. Real-time agent assist surfaces customer-related information and prompts agents to help them resolve customer queries faster. AI-based chatbots provide more insightful responses than simple scripts, helping to reduce call volume and allowing agents to focus on the most complicated cases.

## Integrating Unified Communications and Contact Center Technologies

Customer experience managers in contact centers want to overcome obstacles such as a lackluster customer journey, data silos, and lack of visibility into the customer journey. Yet, if they don't have the right solutions in place, that's not possible.

A next-gen cloud contact center solution creates a better customer experience by giving your agents the tools they need to meet your customers' needs. A cloud contact center that is integrated with a unified communications solution, for example, provides access to an internal directory with presence information so your agent can connect to other experts within the company and ensure the customer's issue is resolved in the first interaction. This capability

helps improve your first contact resolution rate, an important measure of customer satisfaction. File sharing capabilities further enable customers and employees to easily exchange information that can help solve problems.

The business benefits of integrating UCaaS and CCaaS include higher agent productivity, customer satisfaction, and first contact resolution.



REMEMBER

The next-gen cloud contact center delivers an integrated approach to unified communications and contact center software that brings business experts and contact center agents together across every channel — not just voice — to deliver modern, real-time customer experiences in a cloud-based, collaborative customer engagement structure.

## IN THIS CHAPTER

- » Leveraging artificial intelligence, chatbots, and automation
- » Reviewing contact center operations
- » Building a customer-centric contact center

# Chapter 3

# Understanding AI and the Future of Cloud Contact Center Technology

In this chapter, you look at key technologies in the next-generation cloud contact center, the changing nature of contact center operations, and the customer-centric role of the modern contact center.

## Deploying Contact Center Technologies

We now live in an age of instant gratification. With numerous solutions available at their fingertips, customers demand service that lives up to their demand for faster and better results. To keep up, contact centers have to carefully balance quick responses with personalized customer experiences, more interactions with less time, and automation with a human touch.

The next-gen cloud contact center is built on the foundations of the systems that came before it. By cherry-picking the best elements of existing systems and enhancing them with innovative new technologies — such as artificial intelligence (AI), chatbots, and automation — next-gen cloud contact centers allow organizations to deliver the experiences their customers demand.

## Artificial intelligence

AI and machine learning are increasingly being used in next-generation cloud contact centers to drive meaningful and actionable insights from analytics — for example, to enable customer self-service through natural language processing (NLP), optimize skills-based routing across the contact center, and train agents in real time.

To meet constantly evolving customer demands, contact center solution providers have largely focused on AI as the best solution. Some common examples include

- » Intelligent virtual agents (IVAs)
- » Agent assist
- » Summaries and transcriptions

## Chatbots

*Chatbots* are computer programs that simulate human conversation. The most common way customers interact with chatbots is through text. Chatbots are becoming more popular in the context of customer service; they can handle simple interactions or gather information so that an interaction can be passed off to a human contact center agent. But don't mistake chatbots for a glorified switchboard. With all the data they gather, chatbots help organizations intelligently route customers to the right agent as quickly as possible. A chatbot can gather a customer's name, authenticate their identity, aggregate the customer's history with the company through its customer relationship management (CRM) software, and present this data to the agent handling the call so they can provide a more personalized experience.

Chatbot capabilities become particularly important as businesses open up their communications channels, offering dozens of new touchpoints, such as social media, mobile apps, and text

messaging. With customers able to contact businesses however they want, the volume of messages is skyrocketing — so much so that human agents alone will be unable to deal with them.

## Automation

As contact center AI continues to evolve, simple and repetitive tasks can be taken on by chatbots, saving a ton of money and freeing up agents to work on the harder stuff that really requires the human touch. Automating agent tasks and customer interactions has already produced incredible improvements in contact center costs and efficiency.



TIP

Gartner predicts that by 2026, automated conversational AI solutions will reduce agent labor costs by around \$80 billion ([www.gartner.com/en/newsroom/press-releases/2022-08-31-gartner-predicts-conversational-ai-will-reduce-contact-center-labor-costs](http://www.gartner.com/en/newsroom/press-releases/2022-08-31-gartner-predicts-conversational-ai-will-reduce-contact-center-labor-costs)).

Further automation of contact center features offers increased resources for business growth and new opportunities to create the ultimate customer experience. The addition of AI in customer service has incredible benefits for businesses of all sizes and industries, such as:

- » **Minimizing customer effort in customer service interactions:** Quick resolutions are key to customer satisfaction. According to Hubspot, one-third of customers experience the most frustration when they have to wait on hold, and another one-third are frustrated the most when they have to repeat themselves to multiple agents during a call. With advanced contact center technology, callers can immediately connect with the right agent or department, often completely eliminating the need for hold queues. With outbound automation, contact centers can even reach out to customers before they contact the company. With the introduction of chat features to web pages, businesses can better anticipate customer needs, finding immediate solutions and gaining total satisfaction.
- » **Maximizing agent efficiency:** Agents are the biggest cost in a contact center, so maximizing agent efficiency is the key to saving money. Automation has already drastically improved contact center results. Customers want frictionless interactions — the best driver of customer satisfaction is fast

answers to their questions. Automation can help here, too. The introduction of IVR systems, for example, has eliminated the time spent answering frequently asked questions and low-priority calls, allowing agents to focus on more-important tasks. With customer information, powerful analytics, and process automation at every agent's fingertips they can work faster and more accurately. As automation further streamlines contact center services, agent responsibilities can shift from customer interactions, allowing them to do much more in far less time.

- » **Empowering smaller, more powerful workforces:** Not only does automation speed up processes and lighten the admin burden of agents, but AI is able to support and train agents on the job, helping them perform better as they work. Reducing manual tasks allows businesses to increase the quantity of queries handled, improving sustainable scalability. Agent assist improves the quality of customer service delivered, helping companies improve their customer satisfaction score (CSAT) and driving revenue.



REMEMBER

For modern contact centers to deliver a truly exceptional customer experience, they must integrate new technologies like chatbots, AI, and automation to reduce the inefficiencies associated with human agents manually answering calls and deciding how to route them.

## Looking at Contact Center Operations

The main function of a contact center is to act as a bridge between the customer and the company. Most contact center agents have the following responsibilities, among others:

- » Handling inbound customer interactions
- » Offering proactive outbound engagement to generate revenue and inform customers
- » Interviewing clients and verifying information
- » Resolving customer complaints and providing general customer support
- » Resolving customer issues preemptively
- » Managing multiple customer communication channels



But there's much more to contact center operations than agent responsibilities. Your contact center agents are your brand's ambassadors. The global pandemic forced society into isolation but also ushered in a new era of digital interaction. For many, this new digital experience will become a way of life long after the pandemic ends. Technologies such as AI, chatbots, and automation can greatly improve agent efficiency and customer satisfaction, but the goal is not to replace human agents entirely. Instead, the goal is to allow human agents to focus on delivering more personalized and meaningful customer interactions. When it comes to the contact center, your human agents are responsible for the overall customer experience.

## Recognizing the Customer-Centric Role of the Contact Center

The customer journey is one of the most important aspects of your business because customers have access to more touchpoints today than ever before. There's your website, live chat capabilities or chatbots on your website, social media channels, and third-party sites such as reviews or forums where people talk about your brand and its products or services.

Your contact center serves as a beacon for customers. When they encounter a problem on their customer journey, they tend to turn to a contact center first because it's supposed to be the official source of information, and contact center agents are expected to help customers with those problems.

A customer-centric, next-gen cloud contact center ensures that you can communicate with your customers, on their preferred channel, easily and efficiently throughout the customer journey. The foundation of a customer-centric, next-gen cloud contact center has the following key characteristics:

- » **Cloud-native:** It runs in the cloud, so it provides agents and supervisors greater flexibility to work from anywhere and ensures business continuity while continually delivering agility and innovation.
- » **Advanced routing:** Intelligent routing connects customers to the right agents to help them based on numerous factors,

including agent skill to handle a specific request, customer data in a CRM or other business system, and other attributes.

- » **Omnichannel:** It features omnichannel support, allowing customers to move seamlessly between their preferred channels while having a single identity with the business.
- » **Self-service:** Customers can utilize self-service capabilities such as knowledge bases and chatbots.
- » **Workforce management and AI:** Tools to easily adjust staffing levels, engage the workforce, and provide real-time support and training to agents as they work.

## IN THIS CHAPTER

- » Empowering contact center supervisors and agents
- » Tracking the metrics that matter most
- » Taking customer experience to the next level with analytics

# Chapter 4

## Going beyond Metrics with Analytics

In this chapter, you see how contact center supervisors and agents can proactively monitor and improve performance, which key performance indicators (KPIs) you need to track, and how you can use analytics to deliver a superior customer experience.

### Measuring Success in the Contact Center

Next-gen cloud contact center software offers built-in analytics that give you a wealth of information about your contact center's performance. Savvy contact center managers are able to see trends in their analytics and either address issues before they become much larger problems or seize opportunities to become more profitable. Proactively acting on this information enables you to improve your contact center performance in meaningful ways that can pay big dividends for your business. According to McKinsey research, the benefits of proactively tracking contact center metrics include

- » Reducing average handle time by up to 40 percent
- » Increasing self-service rates between 5 percent and 20 percent

- » Decreasing employee costs by up to \$5 million
- » Improving the conversion rate on service-to-sales calls by almost 50 percent

Best-of-breed contact center technology provides comprehensive analytics, including the following:

- » Omnichannel analytics, so you can see the full customer journey across all channels
- » Customer surveys such as Net Promoter Scores, Customer Effort Scores, general satisfaction ratings, and more
- » Brand ambassador and detractor statistics

Additionally, contact center supervisors can gain insight into their employees' performance with next-gen cloud contact center software. They have access to analytics on metrics such as average handle time, first contact resolution, and more. With these analytics, supervisors can effectively coach their agents to improve their performance.

Beyond measuring performance, contact center supervisors still need to be able to coach their agents — even in a remote contact center. Features like whisper allow supervisors to speak to an agent during a customer call without the customer hearing the supervisor. Videoconferencing is great for one-on-one coaching, as well as team huddles at the start of a shift (much like the team standup meetings at a supervisor's desk that may have taken place in a physical contact center).

But today's remote contact center agents also enjoy greater autonomy than in the past. Giving your agents more autonomy gives them greater responsibility for the quality of their work. Instead of relying on a supervisor to counsel an agent about poor performance, you give your agents the tools to evaluate themselves. When you create a culture of self-analysis and continuous improvement, your contact center only gets better.



TIP

Next-gen cloud contact center software tracks employees' performance wherever they're working, making it ideal for contact centers with remote agents working from home.

Today's contact centers can provide open access to performance data for agents. Your agents can click into teamwide dashboards

and see how they're performing compared to their team averages. For example, an agent might log on and see that their customer satisfaction score is lower than their team average. Now, they know something is wrong, and they can take proactive steps to fix it — but only if you've made it clear that self-evaluation is part of their new role as a remote agent.



TIP

Giving your agents more autonomy and providing access to their own performance data means they'll no longer sit in the dark, waiting for supervisors to assess their work. Instead, they can click into their performance dashboard to see how well they're performing. They can take control of their own work lives and kickstart a process of self-improvement.

## Understanding Today's Contact Center KPIs

An organization can use lots of different key performance indicators (KPIs) to measure the performance of its contact center. Depending on the purpose and goals of your organization's contact center, certain KPIs and metrics will be more important than others. Here are some common contact center metrics that every organization should monitor:

- » **Customer satisfaction:** Customer satisfaction measures how happy your customers are with your product or service. It has a direct impact on your customer retention rate. If you're not looking at your customer satisfaction rate, you don't know whether your customers are pleased to do business with you or whether they're about to leave you for your competitor.
- » **Customer retention rate:** Your customer retention rate is the average length of time someone stays with you as a customer. Tracking this metric shows you how many customers you've succeeded in keeping. It costs far less to keep an existing customer than to acquire a new one — numerous studies have shown it can be anywhere from 5 times to as much as 25 times more expensive to get a new customer.

- » **First contact resolution:** First contact resolution metrics show how many customers you're able to help the first time they contact you. This particular metric is closely linked to your customer retention rate. The more problems you can solve the first time a customer contacts you, the more likely that person will stay a customer.
- » **Call abandonment:** Without a solid cloud-based, contact center system, many companies struggle to identify how many customers simply give up (that is, hang up) due to long hold times, confusing interactive voice response (IVR) menu options, or other factors. Your call abandonment rate is important because it can be an indicator of customers you've lost forever.
- » **Average hold time:** This metric (or similarly, average speed of answer) is an important factor that leads to customer frustration and high call abandonment rates.
- » **Average handle time:** Average handle time refers to the average amount of time an agent handles a customer interaction. This is one of the contact center metrics where you have to tread carefully. For the most part, long handle times are not good; they could mean that your agents aren't trained properly to solve customer problems. On the other hand, you can't look at this metric in a vacuum. You may have a complex product or service that will require agents to spend more time on problems. Look at this metric in light of things like your customer retention rate, and customer satisfaction.

Average handle time can also vary based on the channel. Voice is synchronous; a voice call will typically be handled the fastest. On the other hand, businesses should expect asynchronous channels like email to take longer to resolve issues. Businesses tracking average handle time should avoid a one-size-fits-all approach.

Many forward-thinking companies avoid average handle time altogether, because it can drive bad behavior (such as wrapping up calls prematurely to improve an agent's score). Instead, these companies may look at the amount of time an agent spends talking to customers over the course of a day, regardless of whether it's one call or a hundred. This approach assumes that the time agents spend talking to customers is their best spent time of the day.



TIP

» **Adherence to schedule:** Adherence to schedule focuses on the amount of time an agent is available to work. It can replace average handle time as a metric. This metric looks at every aspect of what employees do on the clock:

- The time they spend answering customer queries through any channel
- The time they spend on post-customer interaction tasks
- The time they spend waiting to deal with incoming interactions



TIP

Consider tracking adherence to schedule if you're concerned that your team isn't reaching peak productivity. These contact center analytics help you identify your busy periods so you can optimize your scheduling.

» **Quality of service:** Quality of service looks at how reliable your contact center software is. Your contact center can't afford dropped calls or calls with terrible audio quality. Measuring your quality of service enables you to fix problems before they have a serious, negative impact on your business.

## Defining the Customer Experience

The rules for customer engagement have changed. It's not enough for companies to monitor their phone lines and email inboxes during normal business hours. We live in an always-on society, and organizations must adapt to stay relevant and competitive. But being available when your customers need you is just the start.

Modern consumers have moved beyond traditional communication channels like phone and email. Today, they expect engagement on their preferred channel — whether it's phone, text, social media, chatbot, or something else entirely. Ultimately, customers want their interactions with you to be as easy as talking with a friend.

Modern consumers are also better informed. The traditional contact center is no longer the first point of contact for a growing number of consumers. By the time a consumer reaches out, they've likely already Googled their issue, searched through support forums, and watched self-help videos on YouTube. So, the next-gen contact

center must be able to correctly route complex issues to skilled agents to deliver an exceptional customer experience every time.

A report by McKinsey found that successful digital-first contact centers have seven common characteristics: simplicity, convenience, interactivity, consistency, value, desirability, and brand. Next-gen cloud contact centers — specifically those with unified communication integrations — give remote agents the opportunity to deliver in all these areas. But the remote working model built on these platforms also directly impacts and defines the customer experience in the following ways:

- » **Building a superior, diverse talent pool:** Operating a remote contact center broadens the potential hiring pool. Whereas physical call centers could only recruit agents within commuting distance of the building, remote workers know no geographical bounds. Likewise, skilled people with disabilities who might otherwise have been discouraged by a challenging commute or rigid office conditions face no such misgivings. The same goes for working parents with tight schedules, military spouses who frequently relocate, or students looking for part-time work. More people competing for a single position gives you more opportunities to hire the best possible agent — and better agents lead to improved customer satisfaction.
- » **Keeping your workers happy means satisfied customers:** Not only do customers prefer interaction with remote agents, but agents also prefer working that way. A Stanford study found that contact center workers were 13 percent more productive working from home. Remote agents report higher levels of satisfaction, increased ability to focus, better sleep, and less stress. By cutting out that morning commute and arranging their workspaces themselves, agents are more satisfied with their jobs. Because happy workers are less likely to change jobs, lower rates of churn save money and keep knowledge and agent-specific skills in your contact center. And who benefits the most from a happy, experienced team of contact center agents? The customers who contact them.
- » **Making stronger connections through better collaboration:** Agents now use chat functions to share best practices with each other. Maybe a mix-up in the shipping department



has created confusion for several customers. Staying connected and keeping the team on the same page helps ensure agents can deal with those issues in a consistent, repeatable way. Despite their new physical distance, technology keeps agents better connected than ever before. They may not sit side-by-side anymore, but improved tools mean more opportunities for collaboration. For customers, that means faster, consistent results even if the agent needs to reach out to an expert in another department.

- » **Improving performance through coaching:** AI provides a 24/7 coach behind every agent through agent assist, which means coaching happens throughout the day. The assistance is immediate, virtual, and not reliant on supervisor presence, making it infinitely scalable and accessible from anywhere. Managing by walking around a physical call center had limitations — it was difficult for managers to cover lots of ground and jump between agents. Agile cloud-based management platforms still allow supervisors to seamlessly move from agent to agent and call to call. The highlighted improvements from agent assist and from supervisors lead to an improved experience for the next customer.

## IN THIS CHAPTER

- » Identifying your capabilities
- » Determining where you need to start
- » Developing a plan to get to your desired state

# Chapter 5

# Getting Started with a Next-Gen Cloud Contact Center

There's never been a more important time to build a customer-centric service strategy that goes above and beyond expectations to deliver a superior customer experience. However, transitioning to a digital-first, integrated cloud-based contact center with distributed teams doesn't happen overnight. In this chapter, you find out about the key areas to look at in a maturity model for your contact center and discover how to assess where you're at and how to get your contact center to where it needs to be.

## Defining a Maturity Model

Customers move at lightning-fast speeds, and businesses need to respond just as quickly without sacrificing service or quality. Next-gen cloud contact center solutions can revolutionize the way you provide service to your customers and make it easier to

manage daily operations so you can focus on delivering excellent customer experiences.

A maturity model can help you determine where to get started with your next-gen cloud contact center. You can determine your current capability level (Basic, Standard, Advanced, Optimized) to help you determine where to focus your efforts in three key areas: customer experience, agent productivity, and overall customer experience strategy.

## Assessing Your Current State

Knowing where you are helps you determine the best way to get to your goal. Consider the current state of your contact center to determine your organization's overall maturity level with regard to customer experience, agent productivity, and overall strategy.

### Customer experience

Take a few minutes to assess your customer experience and evaluate how you're providing personalized, intelligent interactions to your customers on the channels of their preference. Rate your current capabilities on the following metrics; then take the average to determine your organization's customer experience maturity level:

- » **Self-service options:** The tools and capabilities you provide for your customers to solve issues themselves so they can avoid waiting on hold for an agent to assist them with relatively simple or common issues. Rate your organization:
  - *Basic:* Static interactive voice response (IVR) choice tree with a finite number of ports that are dimensioned for peak traffic. (1 point)
  - *Standard:* Unlimited IVR capacity and context-based phone tree logic. (2 points)
  - *Advanced:* Ability to deflect voice calls to digital channels through omnichannel self-service, bots, and IVR. (3 points)
  - *Optimized:* Actionable automation analytics and insights, natural language processing (NLP), and unstructured input processing. (4 points)

» **Omnichannel flexibility:** The ability of your contact center to meet customers on their preferred channels with quick responses and personalized experiences and provide a consistent experience across different channels. Rate your organization:

- *Basic:* Siloed solutions from different one-touch vendors with no integration across digital channels or with voice. (1 point)
- *Standard:* Integrated agent experience across voice, text, and email from one vendor with unified routing and reporting. (2 points)
- *Advanced:* Single pane of glass for agents to support all digital channels (such as Facebook, Twitter, email, chat, in-app messaging, and so on) with unified routing and reporting. (3 points)
- *Optimized:* Artificial intelligence (AI) powered content analysis to route questions to respective teams/departments through skills-based routing. (4 points)

» **First contact resolution rate:** An important performance metric that shows how effective your contact center is in resolving customer issues with a single contact rather than multiple contacts that can increase customer frustration and decrease customer satisfaction. Rate your organization:

- *Basic:* Simple queue-based routing; frequent agent transfers; customers must call back repeatedly about unresolved issues. (1 point)
- *Standard:* Data-driven routing through open application programming interfaces (APIs) to retrieve data from back-end and customer relationship management (CRM) systems to make smarter connections. (2 points)

**Note:** An API is a set of rules and specifications that software programs can follow to communicate with each other. It serves as an interface between different programs and facilitates their interaction.

- *Advanced:* Intelligent routing selecting best suitable agent; access to subject matter experts (SMEs) across the company with presence indications for easy transfer or conference to resolve customer inquiries. (3 points)

- *Optimized:* Escalation to video for increased communication between agent and expert or customer and expert; easy to use and doesn't require a download. (4 points)

» **Frictionless interactions:** The ability of your contact center to deliver satisfying and consistent experiences across different channels. Rate your organization:

- *Basic:* Lack of consistency in responses across agent teams and various channels for agent support tasks. (1 point)
- *Standard:* Easy-to-update agent scripting tools allow flexibility while maintaining consistency in agent responses to customer inquiries. (2 points)
- *Advanced:* Unified scripting and access to knowledge bases for all agents on every channel so agents can deliver personalized customer experiences. (3 points)
- *Optimized:* Proactive outbound dialing leveraging analytics with actionable insights to proactively reach out to customers and meet their needs before they call. (4 points)

» **Voice of the customer/customer satisfaction:** Your ability to evaluate your contact center's performance with customers and measure against your competition. Rate your organization:

- *Basic:* Stand-alone survey tools make it difficult to correlate survey results with specific interactions. (1 point)
- *Standard:* IVR-driven survey post-call; direct correlation with agent for each call. (2 points)
- *Advanced:* Surveys on every channel (voice and digital) following interactions; unified view of Net Promoter Score (NPS) or other industry standard measurements across every interaction channel. (3 points)
- *Optimized:* Leverage individual customer satisfaction scores for skills-based routing and match lowest satisfied customers to highest skilled agents. (4 points)

## Agent productivity

How do you provide your employees with the tools they require to maintain productivity and collaborate with experts across the business? How do you provide coaching and feedback for continuous agent improvement?



REMEMBER

Two-thirds of the cost of a contact center is agent labor, including salaries, benefits, office space, and so on.

Rate your current capabilities on the following metrics; then take the average to determine your organization's agent productivity maturity level:

» **Agent tools:** Your contact center depends on tools and infrastructure to deliver reliability, performance, and security, ensuring you have the capability to meet customers on their preferred channels. Rate your organization:

- *Basic:* Multiple siloed tools with limited or no integration forcing the agent to toggle back and forth between tools. (1 point)
- *Standard:* Unified agent desktop for voice and basic digital (chat, email, text) with CRM integrations and screen pops that surface relevant customer information when the interaction is delivered from within a single application. (2 points)
- *Advanced:* Unified omnichannel agent desktop on a single pane of glass for every interaction, including voice and advanced digital (messaging apps, social media, mobile, and so on); integration with CRM and back-end applications within a single application. (3 points)
- *Optimized:* Unified omnichannel agent desktop with CRM and scripting; real-time agent assist based on NLP to guide the agent on the fly. (4 points)

» **Agent hiring/ramp up/onboarding:** Contact center technology should be intuitive and easy to learn so that you can get new agents up and running quickly. Rate your organization:

- *Basic:* Fragmented tools cause agent fatigue and high turnover rates; onboarding processes are long and arduous; training and key performance indicator (KPI) assessments must be performed in person. (1 point)
- *Standard:* Remote training and onboarding (video-enabled curriculum); agent scripting for ongoing enablement. (2 points)
- *Advanced:* An on-demand library of training videos focused on specific soft skills and agent tools. (3 points)

- *Optimized:* Continuous training enablement with content analytics of interactions (voice and digital) and tailored training recommendations by agent. (4 points)

» **Supervisor tools:** Your contact center supervisors need modern management tools (for example, to enable them to course-correct agent behaviors through listening and coaching functions across remote contact centers with agents working from home). Rate your organization:

- *Basic:* Supervisor assessments rely on “walking the floor,” and KPIs are based on basic metrics such as call duration. (1 point)
- *Standard:* Call recording with monitor, whisper, and barge-in features to assist agents in real time; KPIs based on qualitative metrics such as customer satisfaction, business outcome per agent, and so on. (2 points)
- *Advanced:* Proactively monitor interaction quality on every channel (voice and digital) and leverage team messaging tools to coach agents in real time; supervisors can review and validate digital interactions before allowing agents to send. (3 points)
- *Optimized:* Spot customer trends and issues and immediately alert supervisors to take action. (4 points)

» **Workforce optimization:** You need new management tools to measure agent satisfaction, reduce churn, optimize agent schedules, maximize coverage, and minimize idle time across remote contact centers. Rate your organization:

- *Basic:* Managing workforce through simple tools like worksheets, resulting in mismatch of call volume and staffing which further leads to long customer queue times and unnecessary staffing costs. (1 point)
- *Standard:* Managing workforce based on historical voice call volume and real-time adherence; enable agents to trade shifts, bid for days off, plan for training, and so on. (2 points)
- *Advanced:* Workforce management based on call and digital interactions; provide staffing recommendations for all channels; enable agents to trade shifts, bid for days off, plan for training, and so on. (3 points)

- *Optimized:* Leverage AI and machine learning to optimize staffing. Contact center is fully staffed with little to no agent downtime or long customer queues. (4 points)

» **Collaboration with experts across the company:** The tools and capabilities available to your agents for collaborating with other team members across the business to resolve customer issues. Rate your organization:

- *Basic:* No integration between unified communications platform and contact center software; communication mediums within the company are siloed. (1 point)
- *Standard:* Shared directory shows agents who's available across the entire company to maximize efficiency when transferring/conferencing customers to experts across the organization. (2 points)
- *Advanced:* Easy collaboration to better answer customer questions in real time with the rest of the company through team messaging, video meetings, and calling. (3 points)
- *Optimized:* Leverage bots to identify the best expert in the company based on topic; enable agents to discover best resources in real time while on calls with customers. (4 points)

» **Open APIs to integrate with backend systems and workflows:** APIs enable you to easily customize workflows and integrate with apps integral to your business. Rate your organization:

- *Basic:* Limited integration with back-office systems and workflows; requires extensive development and specialized resources to set up and maintain. (1 point)
- *Standard:* Easy integration with business communications tools and data sets via open Representational State Transfer (REST) APIs for voice and digital interactions; provides faster problem resolution and less wait times. (2 points)
- *Advanced:* Unified digital and voice support platform with integrated business communication tools and data sets. (3 points)
- *Optimized:* Customized workflows to automate tasks that integrate seamlessly into your communication and customer support platform; provides end-to-end productivity improvement. (4 points)



## Overall strategy

Assess your business's overall operational strategy to accelerate growth, reduce costs, and stay on top of industry and consumer trends. Rate your current strategy on the following metrics; then take the average to determine your organization's overall customer experience strategy maturity level:

- » **Contact center growth plans:** Consider your overall strategy including cloud, vendor management, and future-proof technologies. Rate your organization:
  - *Basic:* Multiple one-touch vendors with siloed interaction touchpoints and multi-site deployments that require physical installation and upgrades as you grow; poor capacity planning abilities. (1 point)
  - *Standard:* Consolidation of voice unified communications and contact center platforms to the cloud; centralized routing, unlimited burst capacity, seamless monthly upgrades in the cloud. (2 points)
  - *Advanced:* Full cloud and digital transformation within the customer interaction strategy that removes organizational silos and provides a single solution for customer engagement departments. (3 points)
  - *Optimized:* Optimized, digital-first customer engagement with unified analytics and actionable business intelligence across every interaction touchpoint; customer journey mapping and proactive engagement to maximize business outcomes. (4 points)
  
- » **Changing from cost center to profit center:** Does your contact center infrastructure enable greater efficiencies and agent productivity to transform your contact center into a profit center? Rate your organization:
  - *Basic:* Contact center primarily used as customer support; KPIs to incentivize short calls; agents not empowered to make decisions. (1 point)
  - *Standard:* Cross-train agents for customer outreach (inbound/outbound/blended); KPIs to incentivize customer satisfaction and business outcome; use outbound in low traffic period and reach out for potential up-sales. (2 points)
  - *Advanced:* Decrease costs with call deflection to digital channels; leverage NLP for automation (bots); invest in

agent training and tools to solve advanced problems (access to experts, real-time knowledge bases, and so on). (3 points)

- *Optimized:* AI-driven proactive customer engagement throughout the entire customer life cycle with intelligent scripting and tailored interactions per customer. (4 points)

» **Associated costs:** These include the costs of managing multiple contact centers, vendor relationships, and contact center software and infrastructure. Rate your organization:

- *Basic:* Hardware and software deployments and upgrades to manage each system represent significant expenses with professional services and systems integrators. (1 point)
- *Standard:* Reduce capital expenditures (CapEx) with cloud deployment and save on integrations with a single vendor for unified communication as a service (UCaaS) and contact center as a service (CCaaS). (2 points)
- *Advanced:* Consolidate voice and digital with one vendor; leverage a single pane of glass for every digital communication across the entire company with smart routing to the corresponding teams. (3 points)
- *Optimized:* Leverage analytics to identify large interaction volumes per theme and deploy bots with NLP to automate answers; redeploy agents only for more advanced and complex tasks. (4 points)

» **Ability to support work-from-home (WFH) contact center agents:** How well can you support remote agents with your current contact center solution in the “new normal”? Rate your organization:

- *Basic:* Inability to support remote teams. (1 point)
- *Standard:* Ability to support agents from anywhere with cloud deployment and voice over Web Real-Time Communications (WebRTC); simple data connection is sufficient. (2 points)
- *Advanced:* Enable agents to work from home on any channel (digital or voice) with call deflection to digital channels to reduce voice wait times. (3 points)
- *Optimized:* Utilize the entire UCaaS portfolio to run daily team meetings, celebrate wins, hire, onboard, train, and provide feedback to remote teams via messaging, video, and voice. (4 points)

» **Innovation (AI and NLP):** Does your current contact center solution enable business agility with advanced technologies (such as AI, messaging, bots, and so on)? Rate your organization:

- *Basic:* Antiquated equipment without modern APIs to allow for AI/NLP integration. (1 point)
- *Standard:* Cloud IVR with open APIs allowing integration with leading AI/NLP providers such as Google, Amazon Web Services (AWS), and so on. (2 points)
- *Advanced:* Ability to automate simple queries with bots and provide answers or gather information up front automatically and route to an agent with skills-based routing and with the full context for an optimized interaction. (3 points)
- *Optimized:* Real-time integration (voice and digital) with leading AI/NLP providers via open APIs with real-time agent assist; AI understands customer questions and proactively provides agents with the best answer based on machine learning. (4 points)

» **Security:** How do you protect your customer data and maintain security and compliance? Rate your organization:

- *Basic:* Hard to maintain compliance with yearly certification assessments and investment in experts to maintain the security of on-premises equipment. (1 point)
- *Standard:* Leverage certification from the cloud for compliance requirements such as Payment Card Industry Data Security Standards (PCI DSS), Health Insurance Portability and Accountability Act (HIPAA), FedRAMP, and so on; stay current with latest certification. (2 points)
- *Advanced:* Leverage expertise of most advanced experts on security with cloud applications running in the public cloud. (3 points)
- *Optimized:* Regular penetration testing/assessments with top security talent from third-party providers to identify and remediate vulnerabilities and protect customer data. (4 points)



TIP

How does your organization measure up to that of your industry peers? Go to <https://assets.ringcentral.com/us/checklist/assess-implement-cloud-contact-center.pdf> to find out. You'll receive a personalized report with actionable insights and recommendations on how to evolve your strategy.

## Moving Your Contact Center Forward

With a good understanding of your organization's current state, you can define your desired future state and perform a gap analysis to determine what it will take to get you there. As you plan your path forward, also consider your top business priorities, such as the following:

- » Boosting agent performance
- » Enabling WFH
- » Adding more digital channels
- » Improving reporting and analytics
- » Improving voice of the customer/NPS scores
- » Moving to the cloud
- » Increasing automation (such as bots and AI)
- » Integrating UCaaS and CCaaS

## IN THIS CHAPTER

- » Delivering a digital-first customer experience
- » Getting customers to the right agents with the right skills
- » Managing traditional and remote contact center agents
- » Evolving the roles of supervisors and agents
- » Attracting talent from everywhere
- » Interacting with customers on the channel of their choice
- » Staying current in the cloud
- » Focusing on your customers

# Chapter 6

## Ten Takeaways for Your Next-Gen Cloud Contact Center

In this chapter, I leave you with ten key takeaways to keep in mind as you elevate customer experience to a new level with a next-gen cloud contact center for your organization:

- » **Bringing automation to your contact center:** A digital-first customer experience is replete with automation — from chatbots and natural language processing (NLP) to skills-based routing, virtual hold, call deflection, and more.

- » **Leveraging intelligent routing:** Route customers to the right agent with the right skill sets to resolve their issues quickly and efficiently.
- » **Maximizing agent productivity:** As automation increasingly frees humans to focus on other tasks, agents can be trained to handle both inbound and outbound calls to maximize their value to the organization.
- » **Working in hybrid teams:** The next-gen cloud contact center enables organizations to manage hybrid teams working in on-premises contact centers and remotely.
- » **Recognizing the changing role of the supervisor:** Managing, coaching, and mentoring remote agents requires supervisors to master a new set of management tools in the next-gen cloud contact center.
- » **Recruiting diverse worldwide talent:** The new normal of remote working enables organizations of any size to recruit from a worldwide talent pool to get the best agents for their contact center.
- » **Enabling omnichannel communications:** Customers today expect to interact seamlessly with businesses on their preferred channels, whether voice, SMS, email, live chat, social channels, or something else.
- » **Taking advantage of UCaaS and CCaaS:** Unified communications as a service (UCaaS) and contact center as a service (CCaaS) platforms enable businesses to leverage evergreen deployments that are kept up to date with the latest enhancements, upgrades, and innovations.
- » **Becoming customer-centric:** To succeed in today's highly competitive marketplace, businesses must proactively manage every step of the customer journey.
- » **Delivering a superior customer experience:** The next-generation cloud contact center provides organizations of any size and in any industry with powerful capabilities and tools to deliver a superior customer experience every time.

**RingCentral**



**Smarter customer service  
made simple**



Get started today at [ringcentral.com](https://ringcentral.com)

# Consistently deliver a superior customer experience

For years, businesses have treated their contact centers as a cost of doing business. That mindset may have been acceptable in the past, but in the modern era of customer experience, not so much. Consumer behavior has changed — and not by a little bit. Modern customers do their own research before asking for help, and when they do reach out for help, you can be sure their issue will be complex. A next-generation cloud contact center empowers your agents with powerful tools and capabilities to resolve even the most difficult customer problems and deliver a superior customer experience.

## Inside...

- Boost agent productivity
- Reduce operating costs
- Interact with customers across channels
- Leverage AI and chatbots
- Assess your current state and define your goals
- Connect customers with the right agents

## RingCentral®

**Lawrence Miller** has worked in information technology in various industries for more than 25 years. He is the co-author of *CISSP For Dummies* and has written more than 200 For Dummies books on numerous technology and security topics.

Go to **Dummies.com™**  
for videos, step-by-step photos,  
how-to articles, or to shop!

ISBN: 978-1-394-25679-2  
Not For Resale

for  
**dummies®**  
A Wiley Brand





# **WILEY END USER LICENSE AGREEMENT**

Go to [www.wiley.com/go/eula](http://www.wiley.com/go/eula) to access Wiley's ebook EULA.