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DIGITAL

2020 SPECIAL REPORT SERIES



# Opportunities For CX Automation

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This report is provided by **helpshift**

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# OPPORTUNITIES FOR CX AUTOMATION

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Contact center automations may have started as a cost-saving decoy, but today’s contact center leaders are searching for optimizations that confer benefits on both the agent experience and the customer experience. Modern automation use cases extend far beyond “AI for simple tasks, agents for complex ones,” or simply squaring away the administrative minutiae of an agent’s job so they spend less time entering data into a CRM system.

## **Pivotal goal: Reducing friction for customers *and* agents**

Automation needs to be thought of as a tool for creating new *end-to-end processes* designed to reduce friction as much for the agent as for the customer. Thus, it adds the most value when used as a hybrid human-AI solution designed for both internal and external use. Fixating on automating individual agent tasks or specific contact channels fractures the human-AI symbiosis.

For instance, the most basic chatbots answer routine customer questions about business hours or product availability. On the back-end, AI-powered ticket classification enables the bot to handle issues through automated scripts and workflows, while also providing context to a live agent if an escalation is necessary.

This human-AI handoff ensures the customer receives a prompt response to their initial inquiry, while feeding the agent contextual information about the case and empowering them to better assist the customer. If only the back-end or front-end of this process were automated, this benefit would be lost.



## Automation vs. High-Touch: Knowing When to Use Each

An invaluable benefit of automation is a quick, robust window into customer intent. Automated workflows and conversation pathways are designed to infer customer needs as quickly as possible, categorize them and route the inquiry accordingly— be it hyperlinking to a knowledge article or initiating a video call with an agent. This drives down handle times with bots collecting upfront information; resolution rate then improves due to reduced ticket volume for each agent.

However, beware of myopic customer journey orchestration. Sometimes, customers call to report an edge case or scenario you haven't accounted for in your IVR or conversation tree. It's always important to give customers easy recourse to talk to a live agent by making your phone number visible, or offering the option through chat.



“Companies typically start by automating their simplest and highest volume issue categories. They build workflows based on the most common cascade of questions and answers. It’s also an automation best practice to leave “escape hatches” at certain points in the bot-based interaction where the customer can choose to leave and speak with an agent.”

- **Abinash Tripathy**



“When you combine [AI and humans], you can still have a very good, prompt response to customers in need, but in the meanwhile keep your human expertise to tackle the things where more empathy ... or additional knowledge is required. All the edge cases that are less common, where human ingenuity can more easily provide solutions.” - **Gabriele Masili**

# TYPES OF CONTACT CENTER AUTOMATIONS AND HOW TO OPTIMIZE THEM



## 1. CHATBOTS

The hype around chatbots has drawn more attention to the power of automation within the contact center. However, it has also led some companies to deploy bots superficially — even recklessly — without fully considering the use case or tailoring them for today’s customers.

Here are some recommendations for getting the most out of your bots.

### **Use chatbots to handle simple customer requests**

Humans *can* process orders or answer basic questions, but bots can do so in a far more expedient, accurate and cost-effective fashion. Through order kiosks at their restaurants, McDonald’s and other fast food chains have shown customers how digital self-service can provide faster ordering experiences, shorter wait times and fewer errors. Leading e-commerce, finance and healthcare companies have been using AI-driven bots to bring these transactional benefits into chat and messaging.

## Increase accuracy and compliance

Accuracy is paramount in compliance-heavy industries, such as finance and healthcare. Inherently immune to human error, bots guarantee accuracy with regard to standards and policies, and may be better-suited to deliver regulated information than a human because they can present the information the same way every time. Delivering this information via chatbot ensures compliance even as regulations change, because you can quickly update the information in the knowledge base. By contrast, communicating new regulations to employees across the enterprise can be complicated.

Not restricted to compliance matters, this training advantage will yield faster, more accurate interactions in all companies. Given the dramatic changes in workflow stemming from Coronavirus, this benefit is particularly relevant in today's climate.



“It’s so much faster and easier to train a virtual support agent for simple and trivial transactional questions than it is to train a vast workforce, especially if you need to handle spikes and don’t have [staff] flexibility.” - **Gabriele Masili**

## Emphasize personalization, but don’t go overboard with “conversation”

Thanks to their ability to recognize intent, quickly access relevant customer data and adapt conversation flows, chatbots can deliver a “personalized” experience. They can also engage proactively and contextually, such as by reaching out to provide support or offer one-time discounts to customers who seem to be stalling during the checkout process.

Do not, however, mistake bots as an instrument for simulating highly personal “conversations.” Even if customers were looking to have lengthy, personal comedic discussions with corporate chatbots (and no credible data suggests that they are), the technology is not ready to deliver.



“Bots provide the greatest value-add not when they’re making stilted small-talk, but when they’re quickly leading customers to a resolution. A lot of the blowback against chatbots that we saw a few years ago was a result of brands trying to pass off robots as humans. Until it’s actually possible to make a Turing-test-passing bot, there’s nothing to be gained from this, and a lot to be lost.” - **Abinash Tripathy**

Customers have live agents for expert opinions and personal conversations. If they are instead looking for a deep yet seamless dive into their specific account details, a bot may be more appropriate. One of the best ways to infer what a customer needs is by using chatbot buttons (such as emojis that are used to indicate sentiment) or quick answer buttons that allow the customer to take specific actions, such as requesting information, making a purchase or being transferred to a live agent.

## Automate routing and queueing decisions

Vulnerable to the “every customer is our most important customer” fallacy, agents may spend too much time on low-priority, non-time-sensitive issues. Lacking that same empathy, bots can look objectively at the data when making routing and queue priority decisions. They can objectively answer questions like “how valuable is a particular customer?” or “how urgent is this particular issue?” leading to an optimal use of internal resources and the best possible experience for customers.

Bots can also help “pre-qualify” a customer before they speak to a live agent. This offers the dual benefit of **1)** Providing the agent with context on what the customer needs; and **2)** Enabling the bot to better route the customer and make informed queueing decisions, especially when the volume of interactions is high. For example, Amazon has been urging customers to start the interaction with a chatbot — not a live agent— to streamline the customer experience as the company deals with a high volume of Coronavirus-related inquiries.



“Correctly identifying the customer’s problem is the make-or-break step in offering effective, intelligent automation. Without it, all the benefits of automation become null, and indeed can even contribute to making the customer contact experience worse than it would have been without automation.” - **Abinash Tripathy**

## Maintain the customer relationship through asynchronous outreach

Chatbots can be highly useful in maintaining asynchronous contact with customers over the course of a long-term relationship. Bots can be programmed to automatically reach out to the customer at specific intervals or situations.

For example, if a help ticket is taking a long time to resolve, the bot can automatically update the customer on the status. Or, if a customer hasn’t engaged with the organization in a while, chatbots can reach out to the customer to remind them to book an appointment or redeem a promo code — thereby merging the functions of marketing automation and customer contact.

## Improve the employee experience using an internal chatbot

More than just a stand-in for providing 24/7, always-on chat capabilities that offload rote customer inquiries from live agents, internal-facing chatbots help provide a smoother employee experience. Chatbot-driven user interfaces for enterprise software can automate agent workflows, providing them with knowledge articles at the right time, or automatically logging them into applications instead of requiring them to login multiple times while on the phone with a customer.



“Our goal for self-service is to get the customer what they need as quickly as possible. By 2023, our goal is to be at 70-80% self-service. [Not simply for solving problems], using self-service will provide knowledge for customers and agents.” - **Stacy Haynes on how self-service and bots can also be an asset for agents, via the CCW Digital Podcast**



“Ultimately, AI does not possess the emotional ‘soft’ skills that are required to handle more complex support cases. This is where human skills are needed, and this is likely to be the case for the foreseeable future. By leveraging automation in the way described, agents will have more time to employ those skills with every customer, increasing both agent and customer satisfaction.” - **Abinash Tripathy**

## 2. ADDITIONAL CUSTOMER EMPOWERMENT AUTOMATIONS

Customer support chatbots may be the buzziest iteration, but they do not represent the only way automation can elevate the self-service experience. Self-service opportunities, for starters, exist in all channels—including traditional voice communication. The capabilities can also extend beyond support, empowering customers to perform their own tasks, search for information outside of business hours, stay on track, and augment the retail experience.

### IVRs

IVRs are traditionally seen as dead-end call deflectors. Used properly, however, they provide context-based routing to resolve the customer’s issue as expediently as possible. Banner Health, one of the largest nonprofit healthcare systems in the country, successfully introduced a natural language IVR so inbound callers could be patched directly to a patient’s room instead of going through an operator – which shaved contact center call volume by 40 percent. The IVR also routes calls from parents straight to a nurse’s voice badge so they can get up-to-the-minute progress reports on a baby in the natal care unit. From that alone, the call center was able to upgrade job responsibilities and pay scales for the switchboard team, appointing them to more of a consolatory, caregiver-type role to help customers with “bigger concerns.”

Conversational IVRs are also useful when it comes to helping customers deal with sensitive situations. One New Jersey-based collections agency developed an AI-powered conversational IVR that meaningfully addresses, instead of simply deflecting, inbound calls. The IVR system can assist with a range of tasks like disputing a debt, disclosing a bankruptcy and making payments.



As they avoid the discomfort of talking to a human debt collector, customers are empowered to take control of their debt repayments through self service; they can set up payment plans, track their spending and receive overspending alerts. On the flipside, the bot eliminates a great deal of emotionally demanding grunt work for debt collection agents.

Finally, given that the business of debt collection is heavily dictated by financial and compliance regulations, automation goes a long way toward reducing compliance errors by doing the same thing the same way every single time.



### **Voice assistants**

Voice assistants automate entire functions of the customer journey, such as purchases and information requests. For instance, users can buy items on Amazon through Amazon Alexa; owners of Google Duplex can command the assistant to call restaurants, salons and other businesses to make appointments on their behalf and reduce the friction associated with making a call or navigating a website.

### **Using automation technology to improve the in-store experience**

For customers, an abundantly clear benefit of automation is the ability to perform a task or request information anywhere at anytime. Seizing this opportunity, digitally savvy retailers can pair self-service and augmented reality solutions to help customers check inventory, access reviews, compare prices and even navigate the aisles.

Essentially, automation empowers a best-of-both worlds retail experience in which customers can enjoy the tactile benefits of shopping in person while avoiding the inconveniences they have come to expect from brick-and-mortar stores.

The Reformation apparel brand leveraged this reality to reduce long lines for fitting rooms. The brand allows customers to select items to try on from a digital wall and then enter their cell phone number to receive a message when a room becomes available. This allows to multitask while waiting, keeping the customer happy *and* engaged in the potential purchase.

As another example, passport scanners in lieu of immigration officers at US airports mitigate long queues for arriving travelers and crack down on passport counterfeiting.



### 3. ROBOTIC PROCESS AUTOMATION

Robotic process automation is traditionally seen as a back-office matter for data entry, retrieving invoices and other rote tasks divorced from the high-touch, customer-facing activities of the contact center. However, forward-thinking contact centers are combining RPA with artificial intelligence to create process improvements while receiving AI-powered insights and recommendations.

At a minimum, RPA automates repetitive tasks, such as pre-populating a CRM or database based on call metadata, or automatically signing an agent into a corresponding application when they initiate a support ticket.

RPA solutions can go further by helping with processes such as loading a detailed customer profile from multiple systems by automating steps such as application launch, mouse clicks, field entries, and so on. These incremental automations free up the employee to focus on more critical work that requires human intelligence and decision-making. Contact centers already have a lot of rule-based, repetitive functions associated with storing, accessing and updating customer metadata, so it's not too hard to assess which processes can benefit from RPA.

If in doubt, ask your agents — pay attention to what they grumble about the most. Higher-ups often lack insight into the day-to-day pain points endured by their teams. For processes that can't be resolved through RPA, consider updating the user interface of agent-facing systems to eliminate multiple logins or confusing menus.

Another use case for RPA is if you are dealing with multiple systems or applications that can't be integrated. RPA can help automate data merges or pull up information from various systems — or even help you migrate your data.



## 4. AUTHENTICATION

Automatically authenticating customers before they get in touch with a live agent enables the agent to pull up the correct customer metadata in the system, eliminates the need for annoying security questions and circumvents the weaknesses of knowledge-based authentication.

### Voice authentication

Some businesses used voice biometrics to authenticate a caller by having them utter a specific passphrase. However, some fear susceptibility to replay attacks, in which a fraudster impersonates a victim by playing a recording of their voice. Rather than asking for a passphrase, automated voice authentication systems passively capture voice biometrics data throughout the course of a normal

phone conversation with a live agent to create a unique voiceprint for each customer - making it “text-independent.” This way, the next time the customer calls, they are automatically authenticated using their unique voice print, without being asked to utter a passphrase.

### Device authentication

New authentication technology is often tied to a customer’s smartphone or other ownership token, such as the random number generators provided by banks, which can only be used by one customer at a time and therefore can’t be spoofed, duplicated or anonymized — unlike phone numbers.

Bank of America, for instance, uses a technology that authenticates the device the customer is calling from in addition to their phone number. Some phone companies can analyze calls pre-answer to provide a risk rating. They track factors such as device type, location and frequency of inbound calls, and then check to see whether the number has been duplicated, virtualized or spoofed.



## 5. IOT-ENABLED AUTOMATIONS

IoT-connected devices constantly collect data on user behavior, and they represent a huge opportunity for CX automation. Insurtech companies, for example, are leveraging GPS-enabled car tracking devices or wearable technologies to track customer behavior on the road, and in turn offer pay-as-you-live premiums.

Electronic manufacturers have meanwhile engineered their appliances to self-diagnose defects or breakdowns and automatically notify customer support that a part needs replacing, largely (if not completely) taking customer effort out of the support equation. Unlike aggressive email blasts and tacky, salesly text messages, this form of proactive care adds value to the customer experience.

It also helps reposition product-led brands as service-driven companies. Consumer tech companies can leverage the in-product, automated service component as a selling point—and distinct competitive advantage.



“Imagine an IoT-connected device on an electric car sending a signal that the battery’s ability to hold a charge is fading. Instead of dealing with an urgent ticket from a customer whose car is dead on the highway, customer service proactively notifies the driver to bring the car in for a battery change. As vast amounts of data about each customer continue to become available, this futuristic model of customer service will become more and more viable.”

- **Abinash Tripathy**



## 6. VIRTUAL AGENT ASSISTANTS

Virtual assistants embedded in CRM systems automate an agent’s workflow while eliminating the hellish parts of their job. Sixty-eight percent of companies (68%) say their agents spend much of their workdays on repetitive tasks like copy-pasting data from one CRM system into another, trawling knowledge bases for key information and filling out forms. Worse, their agent sometimes juggle these cumbersome tasks while on the phone or in a chat with a customer.

Some virtual assistants are more hands-on than others. The most sophisticated systems are equipped with NLP and voice recognition technology to listen in on calls or read chats to infer customer intent and provide the agent with links to relevant information, compliance scripts, or checkboxes for suggested next steps, depending on the situation.

At the very least, a virtual assistant helps the agent access customer data and find information in the knowledge base through a query rather than a manual search. Others auto-populate forms and can even automate specific requests, such as upgrading a customer’s account or emailing an invoice.

## AUTOMATION AS A FORM OF COST CONTROL FOR THE CONTACT CENTER



Manual, convoluted processes take time and money. By streamlining these tasks and empowering customers to do more on their own, automation solutions represent a potential ticket to significant cost reduction. Unsurprisingly, many business leaders focus on this component.

They should—profit matters, after all. It is nevertheless important to avoid letting the emphasis on *cost containment* steer your customer experience in the wrong direction. Do not force closed-in bots onto customers who still require human support. Do not recklessly automate tasks for which human ingenuity is beneficial, let alone required.

Instead, ensure your automation applications fit naturally into your customer and agent experience journeys. Because this will improve performance, agent retention and resolution rate, you will still enjoy cost reduction. You will not, however, risk hurting customer satisfaction in the process.

The key to using automation for cost control is to identify the costs that adversely impact the experience. Here are some examples.

## 1. High agent attrition rate

If your agents are struggling with confusing back-end interfaces and hunting through knowledge bases while on the phone with customers, they are more likely to be dissatisfied with their work. Without automated processes, agents spend the bulk of their time doing administrative data entry tasks during and after a customer interaction. With typical agent attrition hovering at 30-45 percent, contact centers absorb extra labor costs by providing a poor agent experience.

## 2. Long wait and handle times

Automation helps shorten wait times because bots are able to handle multiple customer interaction simultaneously, freeing agents to more efficiently address their queues. Automation further reduces handle times by helping to authenticate customers, capture customer intent and guide agents through the support process. When done entirely manually, these tasks can take considerable time and effort—with agent and customer frustration growing by the second.

This form of automation, therefore, reduces call costs, increases staff availability, and heightens customer and agent satisfaction.

## 3. High error rate

Errors in taking a customer's order or processing a transaction can happen when things are lost in translation, or if an agent has to struggle with a complicated back-end CRM system while interacting with a customer. By empowering customers to perform transactions through automated systems, you vastly reduce human error and its associated costs, which include customer dissatisfaction and the costs of potentially having to compensate customers for the mistake.

## 4. Low customer satisfaction

Low CSAT is the highest cost to your business in the long-term. It compromises your bottom line and reduces each customer's potential lifetime value. If customers appear dissatisfied, investigate the source of friction and consider how automation could be used to smooth the customer journey.

Conversely, misuse or overuse of automation tools can also result in dissatisfied customers. Perhaps your chatbot results in numerous dead-end interactions that don't resolve the customer's issue or your authentication process is glitchy. In both scenarios, it's important to re-evaluate the human-AI handoff.



# ASKING “WHY” IS THE KEY TO SUCCESSFUL AUTOMATION INITIATIVES

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As the “shiny new toy,” automation can bring out contact center leaders’ most short-sighted tendencies. Rather than using chatbots or process automation tools as instruments for achieving goals, companies treat them as the goals themselves. They think about using automation everywhere they conceivably can, without considering what the initiative really means for the customer experience and contact center operation.

Companies are quickly seeing the error of this approach. By not being strategic about which processes and interactions to automate, they are bottlenecking the return on their investments. CCW Digital data confirms that only 20% of companies feel they are successfully using technology to help agents focus on more productive work. Only 9% of consumers, moreover, trust chatbots to solve their problems.

The issue is simple: companies are not paying sufficient attention to the “why” behind their investments. They are not identifying the pain points they can only eliminate with the help of technology. They are not focusing on how AI can reduce key sources of agent effort and frustration. They are not thinking about how AI and humans can intersect to optimize each moment of the customer journey.

As you implement the lessons from this report, do not make the same mistake. Do not aim to excitedly replicate the specific examples and use cases; instead, focus on the *why* behind these success stories. Then, apply that same purpose-driven framework to your organization and its unique needs:

- What extra value can chatbots bring to certain interactions?
- What back-office limitations prevent agents from focusing on high-value work and/or gathering the data needed to deliver in these meaningful interactions?
- How can AI tools help you better and understand your customers?
- How can automation technology seamlessly fit into and enhance the lives of agents and customers?

When you focus on the real problems you want to address and the real value you want to create, you unlock the perfect one-two punch of humans and technology. You spotlight the truest impact of CX automation: strengthening connections while increasing efficiency.



## About the Author



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Kindra Cooper is a digital writer and editor for CCW Digital, the global online community and research hub for customer contact professionals. In her role, Kindra writes daily articles and produces podcasts on customer experience, design thinking, UI/UX, brand strategy and more. Her reporting has appeared in various print and web publications covering politics, arts & entertainment, business and architecture.



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# Upcoming Events

## APRIL

**CCW Virtual Executive Exchange**  
April 22-23, 2020

**Design Thinking Digital Summit**  
April 23, 2020

<https://www.designinnovationglobal.com/events-design-thinking-digital-summit/>

## MAY

**CCW Virtual Executive Exchange**  
May 13-15, 2020

**New Standards for Contact Center Performance**  
May 19-22, 2020  
<https://www.customercontactweekdigital.com/events-new-standards-for-customer-contact-performance>

## JUNE

**CCW Virtual Executive Exchange**  
June 23-25, 2020

## JULY

**Chief Experience Officer Exchange Denver**  
July 27-29, 2020

## AUGUST

**CCW Executive Exchange St. Louis**  
August 16-18, 2020  
St. Louis, MO

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**CCW Vegas**  
August 24-28, 2020  
Caesar's Forum, Las Vegas

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## SEPTEMBER

**Design Thinking**  
September 8-11, 2020  
Hilton Austin, TX

<https://www.designinnovationglobal.com/events-design-thinking/srspricing#/>

**CX Trends, Challenges, & Innovation**  
September 22-24, 2020

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