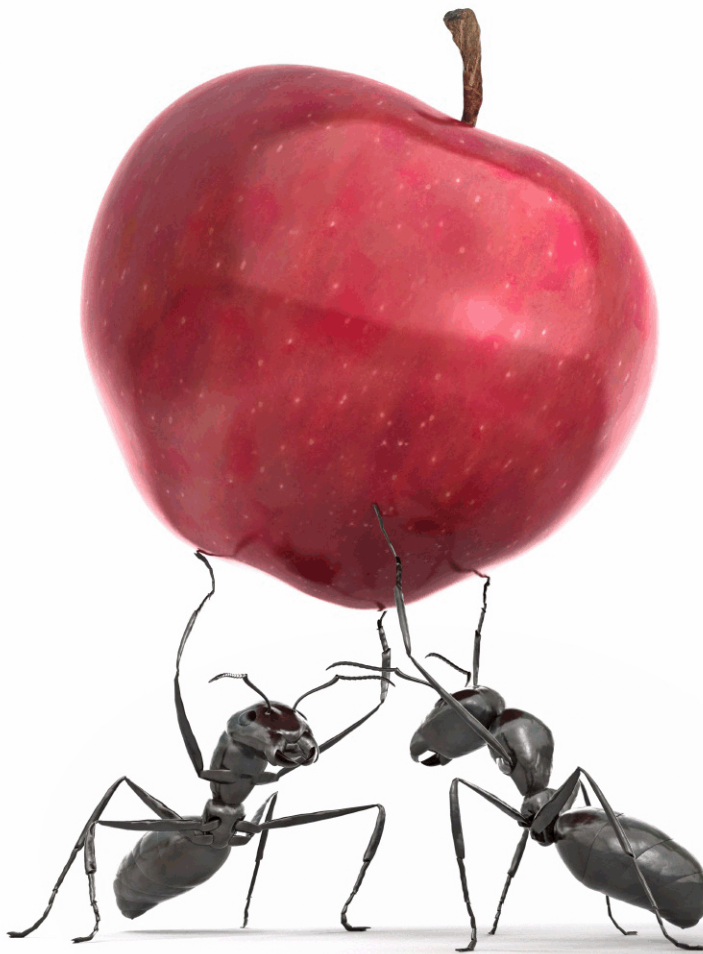


An eGain White Paper

# Doing More with Less

## **Next-Generation Strategies and Best Practices for Customer Service**



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Our new economic reality is one of increased competition, informed and demanding consumers, commoditization of products and services, and relentless pressure to cut costs. In this environment, customer service is the single biggest differentiator in the market. In the last few years, most companies have made significant efforts to enhance the quality of their customer service. However, to build competitive advantage with customer service today, they need to do more with less.

So, how can companies provide differentiated service at reduced costs? They need to implement **NEXT-GENERATION CUSTOMER SERVICE STRATEGIES AND BEST PRACTICES**—both topics are discussed at length in this paper.

Our notion of next-generation customer service is derived from the innovation that we have seen in the past few years: Mission-critical processes and solutions that enable companies to gain competitive advantage from customer service. At the core of the next-generation customer service model are an integrated framework of processes for seamless, service process automation across interaction channels, departments, and functions; unified, multichannel service; unified information and knowledge management; “anytime-anywhere” access to applications; and global contact center operations.

# Strategies for Next-Generation Customer Service

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## Transform your Contact Centers into Profit Centers

### Fully leverage online channels

The Internet has fundamentally changed customer service and interaction models around the world. Today, your customers want to communicate with you not only through traditional channels such as phone and retail outlets and branch networks, but also through web-based channels such as email and live chat. This environment offers you the opportunity to gain strategic advantage through effective multichannel customer service. To achieve the goal of effective customer service, you must be able to interact with your customers through the communication channels of their choice, and ensure customer satisfaction in each channel.

Web-based channels allow companies to transform their call centers, which have traditionally been cost centers, into profit centers. A multichannel approach to customer service not only lets your customers use channels that they prefer, but also leads to deflection of costly phone calls to more cost-effective web-based channels. Significant, measurable cost benefits result from the reduced cost of each customer interaction. According to analysts at the Giga Group, the cost of interactions in call centers is typically \$25 per phone call and \$40 for every call escalated to level 2. Technical support calls are even more expensive—each call costs the call center about \$40, and \$80 if it is escalated to Level 2.

Although the cost reduction imperative in the current environment is forcing companies to reduce their overall call center costs, it is critical for them to maintain the quality of service they provide in order to stay competitive as their customers demand higher availability of prompt, reliable service. Now, customer service strategy should include greater-than-before focus on the quality and range of self-service options offered.

Effective self-service empowers your customers to find the answers they need, at their own convenience, without the need to wait in long queues for

human assistance. For your company, the implementation of self-service means fewer calls into the contact center, reduced costs, and reduced agent churn as a direct result of the decrease in repetitive questions.

Most companies, in their aggressive adoption of less expensive online channels, have not seen the results they anticipated. A critical reason for this is the lack of integration between online and offline channels. In a Forrester survey of financial services companies, 97% of the respondents cited their inability to deliver consistent service across online and offline channels as the major obstacle to achieving success in providing cost-effective online customer service. Your customer service solution should be fully integrated so that customers get consistent service and can seamlessly move across channels.

In the current environment, companies realize that their customer service organization is the most important, if not only, contact with their existing customer base. Effective customer service includes cross-sell and upsell strategies, thus contributing to top line revenue. By using powerful web technology to enhance customer experience, you build customer loyalty and, ultimately, repeat business.

### **Knowledge-power your contact center**

Call escalations, long hold times, repeat calls, incorrect problem diagnosis, and unnecessary field dispatches are primary contributors to the skyrocketing costs of call centers. How can you improve your performance in all these areas without incurring the large costs associated with agent training? One way would be to magically replicate your best-performing agent several times. The other answer lies in effective knowledge management. By knowledge-powering your call center, you equip all your agents with the skills and expertise of your best agents. This ensures that when your customers call your call center, they are guaranteed fast, accurate, and consistent answers, regardless of the experience level of your agents, the interaction channel they use, or the time of day they call.

Besides, with the use of knowledge to power your customer service interactions, you also improve the ability of your agents to cross-sell and up-sell. Agents who are good at service and support may not necessarily do well

converting support calls into sales. The knowledge system, while guiding agents in analyzing customer problems, can suggest specific selling opportunities for complementary offerings and provide agents the scripts and information needed to present those offerings to customers. In this case, the knowledge system not only provides “the right answer,” but actually helps the agent sell.

Remember that each customer service interaction plays a part in determining the future course of your relationship with that customer. Research by the Gartner Group has shown that customers who get the correct resolution to their question or problem in their first service interaction do not mind even relatively long queue times. Gartner found that most satisfied callers have an accurate impression of the time they spent waiting in the queue. On the other hand, for customers who do not feel that they received the help they expected, the impression of the wait time they experienced tends to be longer than the actual time they spent in queue.

### **Personalize service based on customer intelligence and history**

In order to realize maximum returns from your customer service solutions, try to understand your customers and discover their channel preferences. offering email as a channel of customer service to customers of a retail bank would not yield expected ROI if the majority of the bank’s customers prefer to go to local branches. In this case, the bank’s strategy should be to provide self-service kiosks in its branch network to empower customers to help themselves without having to wait in long lines to receive assistance.

Omnichannel customer service solutions give companies the ability to provide differentiated service based on customer value, thus effectively enhancing the profitability per customer. Use self-service as the primary channel of service for low value customers. Ensure that your premium or high-value customers get direct access to customer service agents.

In addition to enabling differentiated customer service, your integrated customer service solution should provide consolidated customer history to all agents regardless of channel. It is likely that your customer service agents spend more time with customers than any other part of your organization.

Give them a 360° view of your customer so that they can offer personalized service that is aligned with the value and preferences of your customers.

### **Create best-fit offers for effective cross-sell and upsell**

A survey performed by PriceWaterhouseCoopers in the United Kingdom showed that established players in the financial services industry had lost £15 billion of business to new entrants in the last 5 years. According to a Gartner Group study of this industry, it costs, on average, \$280 to find a new customer and \$57 to keep an existing one. For high-value customers, the costs involved in acquisition and relationship-building are even further. While these figures are specific to the financial services industry, they are representative of similar phenomena across all industries.

In the current economic environment, more and more companies are relying on their existing customer base for additional revenue. It is imperative for them to devise intelligent ways to bundle their products and services for effective cross-sell and upsell within their existing customer base. Effective cross-selling and upselling involves not just enhanced marketing intelligence, but the continuous sharing of information between your sales and customer service organizations. After all, every opportunity that your customer service organization has had to interact with customers has been an opportunity to nurture relationships.

Ensure that every customer-facing group in your organization has a unified, comprehensive view of the customer. In order to maximize the profitability of each customer relationship, agents should be in a position to offer the right products and services at the right time to the right customers.

### **Transform your multiple, disparate call centers into globally integrated contact centers**

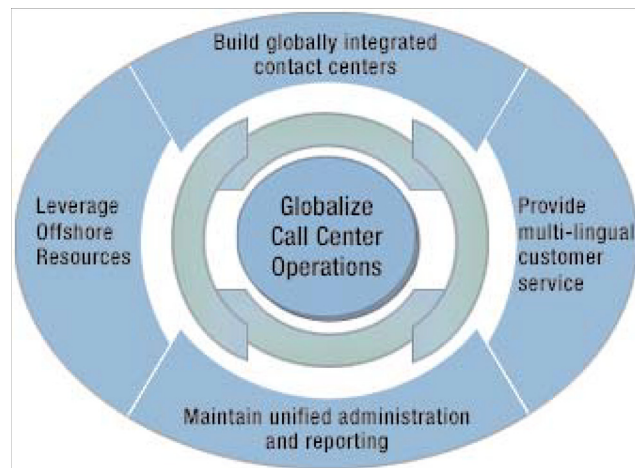
For many companies, the traditional approach to customer service has been to establish multiple call centers, each dedicated to different sets of products or geographies. In recent years, the expansion in the number of products and services offered by companies, the increased importance of cross-promotion, and the increase in the adoption of the web for transactions and interactions, has made the maintenance of product silos inefficient and

costly. Today, companies need agents that can support all their products, and can effectively promote complementary products to customers. In this environment, companies should move towards globally integrated contact centers that have access to unified customer information, knowledge, and reports.

### Leverage offshore resources to drive efficiencies

In 2010, for the first time, consumers used web-based channels more than the phone channel to interact with customer service organizations (Forrester's North American Technographics® Customer Experience Online Survey, Q4 2010). With Internet penetration and digital interaction volume increasing year after year, it's no longer a trend, and companies should consider leveraging offshore resources to drive operational efficiencies. The benefits of providing around-the-clock customer service are many.

The first is cost reduction. With offshore resource costs only a fraction (one-third the cost) of onshore costs, companies can create operational efficiencies without sacrificing customer service levels even in difficult markets.



The second, equally compelling driver, is quality. The presence of highly educated, world-class offshore resources help companies ensure quality customer service. In addition, global outsourcers today have invested in earning certifications such as ISO 9001 and COPC-2000 and in training their resources to maintain standards of quality and efficiency.

Finally, it enables companies to grow and scale customer service resources and infrastructure seamlessly even when faced with shrinking budgets. This ability to scale drives competitive advantage. Companies should ensure that the customer service solution they implement is a web-architected one that scales to handle increasing usage, and can be accessed by users across the world.

### **Monitor quality standards**

About 68% of customers who leave a company do so because they are upset with the treatment they've received (Survey by US Small Business Administration and the US Chamber of Commerce). For contact center operations to be successful, it is imperative that companies define quality and performance standards, and establish clear metrics. Examples of some key metrics are agent productivity, first-time resolution rate, repeat call rate, escalation rates, and knowledge base productivity.

Companies should choose solutions that allow the creation and generation of detailed reports. By monitoring the quality and productivity of customer interactions, and the timeliness of responses, you can reduce the costs associated with numerous repeat calls, escalations, and, most of all, dissatisfied customers.

### **Reduce time-to-market**

In the past few years, most industry verticals (for example, the financial services and telecommunications industries) have seen a dramatic proliferation of products and services. In many companies, this development is driven by deregulation, and in others, by heightened awareness on the part of customers about the alternative options available in the market, lower product switching costs, and an increasing commoditization of products and services in most industries. With the release of new products comes the effort and cost related to training of sales and customer service agents on these new offerings. Companies would like to minimize the time required for this training. Knowledge bases can be used for offering guided assistance to agents to enable them to provide systematic, step-by-step service on new products to end customers.



Companies can also reduce the time-to-market for their new products by creating packages that can be promoted and sold by their customer service agents. This is particularly relevant in the current environment in which agents are the only direct contact that companies have with their existing customer base.

### **Reduce field service site visits**

A benchmark study by TSIA put a shocking figure to field service visits—more than \$1,000 per visit. The outdoor customer service channel then should be used most sparingly. Knowledge-powering your agents and website, and exploiting remote diagnostics and repair technologies reduce the need for site visits.

## **Enhance Customer Satisfaction, Reduce Customer Churn**

### **Provide multilingual service**

In today's global marketplace, it is difficult for companies to establish a presence in international markets without the ability to offer multilingual support. In fact, companies should proactively consider providing customer service in multiple languages. This will ensure that they can compete effectively with local competitors, not only with their products but also with their superior, scalable customer service.

### **Set and evaluate service process metrics**

How do you make sure that your customer service processes are yielding adequate results? While defining your customer service strategy, set measurable targets for your customer service solutions and resources. As you establish these quantifiable, hard metrics, determine how they translate into cost savings or revenue increase for your organizations. Sample metrics for your omnichannel contact center are email response times, phone handle times, time-to-resolution, knowledge usage reports, agent productivity metrics, first-time resolution rates, escalation rates, etc. Finally, ensure that the solution you use to enable your customer service processes provides a comprehensive framework of reporting and monitoring.

## Automate manual processes

In order to increase operating efficiency and reduce costs while providing better service, companies should automate their business processes, using modular, reusable, integratable components. For example, banks can build automated workflow capabilities such as for updating account information, submitting or checking status of applications or claims, generating rates and quotes, renewing policies, and purchasing products, thus enabling their customers to perform these functions through self-service rather than having to call customer service. This automated workflow, combined with web self-service can help your company to meet customer expectations without requiring agent intervention, hold times, or manual processing. A typical framework of rules-based automation consists of a front-end customer service application with automated workflow capabilities and a rules-based engine, and integrated with back-office production systems. The workflow and rules engine should be flexible and easy to modify without inefficient down time.

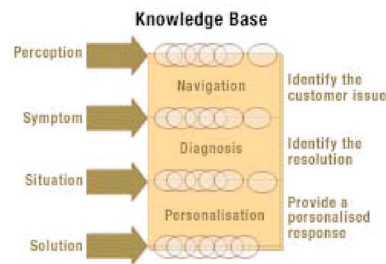
## Engage your customers in providing customer satisfaction

Are your customer service processes working? Are your customers satisfied with the service they receive from your organization? Ask them. Your customer service solution should have the ability to solicit feedback from customers each time they interact with you. Also, the workflow and business rules engines in your solution should be flexible enough to allow you to easily change processes based on feedback.

## Understand your customers

**Knowledge** We define knowledge management as a set of practices that maximizes the business value of knowledge by gathering, structuring, and delivering it at critical points of customer interaction. Building centralized knowledge bases, accessible by your contact center agents, customers, and partners, will enable your organization to achieve strategic goals like lower service costs, improved service, and customer loyalty.

▶ **Lower service cost:** Knowledge management can help you lower costs by reducing the number of repeat calls, and call handling and wrap-up times. You can maximize the ability of even your Level 1 agents to respond to queries. Finally, the implementation of an effective knowledge management solution that is accessible to your customers can empower them to find information that they need through web-based self-service. The result: Improved customer satisfaction and significant cost reduction from the diversion of traffic to self-service.



▶ **Improved service:** Knowledge management also leads to better quality of service. Your customers are more likely to receive the right answers without being put on hold or transferred to another agent. And the value of superior customer service, of course, is enormous. A survey conducted by longtime call center expert Dr Jon Anton for his book, *eBusiness Customer Service*, had a classic revelation, that customers who buy a product with problems but receive “world-class” customer service while resolving the problem are more than twice as likely to repurchase from the company than customers who buy a perfect product with no problems at all. It's true that the probability of selling to an existing customer is 60-70%.

**Customer Interaction History** In order to transform your organization from one that is product-centric to one that is truly customer-centric, you must leverage all the information you have about your customers and apply this information to build a customer-centric approach across all your processes and functions. The challenge for most businesses today is to track and analyze all their transactions with their customers, to build up a more “holistic” customer profile, and then to offer particular products or services in a timely fashion and at a reasonable cost. An important component of this holistic profile of customers is information about interactions that they have had with your organization.

It is critical for your call center infrastructure to allow the storage, archival, and easy retrieval of the comprehensive customer interaction history that

your customer service solution provides. Your organization can use this information for queries, analysis, and reporting to align your strategic and operational decision-making processes with the feedback that you have received from your customers.

**Analytics** Before you implement an omnichannel customer service solution, you should perform a thorough analysis of your customer base and what each customer segment is seeking. Know your customers. Know how a shift in your customer strategy will affect each customer segment. The crucial questions to ask in your planning phase are: What is your value proposition to your target customers? How does it compare with those of your competitors? What attributes of your products or services do your customers value? What value do you derive from retaining your existing customers? What is the lifetime value of the customers you acquire and retain with your programs?

Your customer service solution should enable you to gain a deep understanding of your customers based on detailed, consolidated information on the history of their transactions and communication with your organization. The insight you gain from this centralized customer information is critical to the process of improvement of your products and services.

**Offer structured market feedback to product groups** In building a truly customer-centric organization, companies must establish a continuous feedback loop between their customers and their manufacturing and R&D organizations through their customer contact centers. After all, your customer service agents spend the maximum amount of time with your customers.

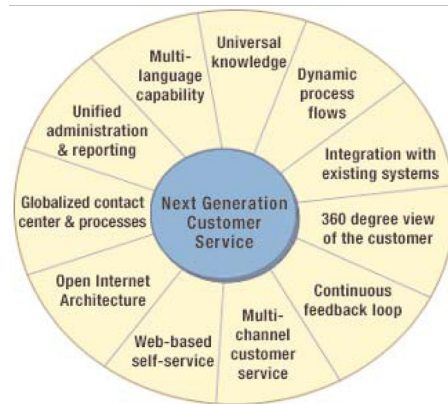
Gain insight into issues being raised by customers, categorize them, and track trends using your customer service solution's reporting and analysis capabilities. Make this information regularly available through automated online reporting to business decision-makers so that they can adjust service capability or product offerings accordingly.

# Proven Best Practices for the Next-Generation Contact Center

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## Build knowledge to improve productivity and effectiveness

**Agent productivity** Use your knowledge management system as your most powerful training tool. You can eliminate both the direct operational and logistical costs of regular training sessions to ensure that your agents are up-to-date on your products and services, as well as the significant opportunity costs associated with the time that your agents spend away from their functions. By providing intuitive, guided access to your knowledge base, you ensure that even your novice agents are productive immediately.



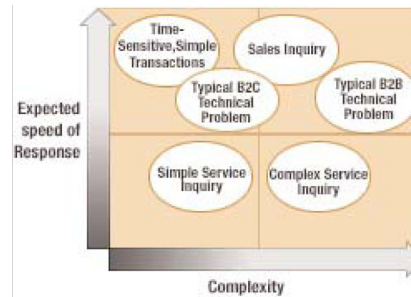
**Customer satisfaction** By enabling your agents to assist your customers more quickly and effectively without long hold times and numerous escalations, you enhance customer satisfaction. Your knowledge management solution should measurably increase first-time resolution rates and, hence, reduce the number of repeat calls from your customers. As a result, you experience a dramatic reduction in your contact center costs, and your customers are saved the inconvenience of having to call you numerous times for the resolution of their issues.

**Self-service** Use your knowledge management solution to power your self-service capability. Provide customers a conversational interface that can take them through a step-by-step process to help them find information, get troubleshooting assistance, or perform complex transactions. By empowering your customers to help themselves, you can reduce total call

volumes in your contact centers and make your customers self-sufficient in performing even complex transactions on your website.

**Cross-sell and upsell** Effective knowledge management can transform your contact center agents

into sales representatives in order to maximize the value and profitability of each customer relationship. Use your guided knowledge management solution to prompt your agents to suggest complementary products to customers in the course of their interaction based on the nature of their dialog, the profile of the customer, the products and services they have already purchased, and the nature of problems they are encountering.



## Capture customer information and knowledge in every interaction

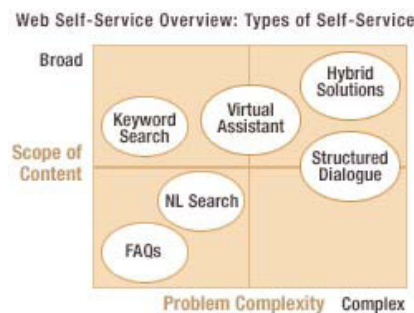
Every interaction that you have with your customers is an opportunity for you to get to know them better. You can use this information to understand your customers' profiles, buying preferences, and transaction history.

- ▶ Use customer interaction information to build a holistic, 360° view of your customers to provide personalized offers to your customers based on their preferences, the products and services they have purchased from you, and their specific requirements.
- ▶ Store and archive all the customer interaction history in your contact center solution. Ensure that this archived information can be queried, analyzed, and allows the creation of reports. Historical customer interaction history can be used to understand your customers, their behavior and buying patterns, and the feedback that they have provided to your organization and products. Use this information in strategic and operational decision-making processes.
- ▶ Use historical customer interaction records to provide ongoing training to your customer service agents on the rapidly evolving needs and expectations of your customers and on processes that have been effective in the past.

- ▶ Ensure that your customer service solution supports a continuous feedback loop to incorporate your customers' views on the effectiveness of your customer service in order to enable continuous improvement in the quality of service you provide.
- ▶ Allow your customer service agents to suggest modifications in your corporate knowledge based on their experience of using it to assist your customers.

## Provide multiple modes of self-service

Web self-service can provide powerful means to automate service without compromising quality, consistency, or accuracy.



- ▶ Use online self-service as the first level of contact with your customers. Ensure that your self-service solution is powered by all the knowledge that is available to your agents through a unified knowledge management infrastructure. Empower customers to perform functions like viewing account updates, status of submitted requests or applications, etc., and provide them ready access to detailed information, while leaving agents to focus on more complex inquiries.
- ▶ Use multiple modes of self-service to suit the wide range of questions that your customers have. For simpler inquiries, a FAQ solution with dynamic and up-to-date content can be sufficient, whereas for more complex inquiries, you should offer guided, step-by-step assistance.
- ▶ Using emotionally intelligent virtual assistants that can talk to your customers in natural language will ensure that the customer's online self-service experience has the feel of personalized, prompt, human service. Your virtual service agents should engage your customers in conversational, intuitive self-service experience so that they come back to use it whenever they have questions..

- ▶ Consider your self-service solution as the first customer-facing tier of your contact center. If your customers are unable to find answers through web self-service, ensure that their issue is escalated to assisted service channels like email, chat, or phone, in a context-sensitive manner. This escalation from self-service to assisted service should appear seamless to your customers, i.e., they should not have to start it all again.

### **Automate compliance with regulations**

In the past few years, regulatory agencies like the SEC in the financial services sector have specified more stringent guidelines for the supervision of all online communication between companies and their clients to ensure security, accountability, and transparency. Some regulations that apply to electronic communication in the financial services industry are related to authorization of agents to reply to customers, approval requirements prior to sending emails to end clients, email tracking, storing and archiving for liability reasons, and customer authentication requirements before customers send or read emails. Companies should ensure that their solutions for online customer service allow them to comply with such industry regulations. Some examples of functionality that should be implemented in your contact center are:

- ▶ Choose a solution that offers out-of-the-box capability to implement security best practices. For example, when you transmit confidential or sensitive account and transaction information, your customer service solution should dynamically replace your agent responses with an encrypted URL that directs your customers to a secure area before they can view this information.
- ▶ Use outbound workflow that does not allow emails to be sent to the customer without prior approval of qualified users of the system.
- ▶ When communicating sensitive customer information electronically, implement a log in and authentication process for your customers before they can access this information. This ensures that this information is viewed by authorized persons only.



- ▶ Your solution should allow you to maintain comprehensive, detailed audit trails for all customer communication, thus ensuring integrity and accountability.
- ▶ Each interaction should be tracked, stored in the databases, and archived on demand.

## Manage your workflow across channels

Your customer service solution should allow you to manage your resources efficiently enabling the most optimal use of your time and ensuring continuous availability of your agents to your end customers.

- ▶ Choose a customer service solution that is deeply integrated across multiple channels, thus allowing your agents to serve your customers through the channel of their choice at any time. Your solution should efficiently route customer inquiries to your agents depending on their availability, skill level, area of expertise, or customer priority, regardless of the channel. For instance, you can optimize the downtime of your email agents by routing live web collaboration or phone requests to them. This ensures that the volume of incoming calls or requests is evenly distributed across your team, and your customers can enjoy the benefit of increased availability of customer service representatives.
- ▶ Live web collaboration is the ideal channel for agents to handle multiple customer requests simultaneously. Unlike the other real time or synchronous channel like phone, live chat does not necessarily tie your agents down to a single interaction at any instant. The ability to handle multiple chat sessions at the same time dramatically increases agent productivity thus decreasing the average cost per interaction.
- ▶ The solution should offer seamless integration with your existing workforce management solutions to enable your existing workflow practices to be incorporated into your customer service processes.

## Reduce shopping cart abandonment rate

How can you prevent your online shoppers from abandoning their transaction halfway through the process because they don't have all the

information you need? What happens when consumers have questions or concerns as they shop online for clothes and shoes, or fill out a loan application form? They can send an email or pick up the phone and spend time navigating through a long menu of choices or waiting to talk to an agent. However, in most cases, they will give up and plan to either “buy it another time,” or “just go to a store.” How do you save your company from losing online revenue everyday?

- ▶ Providing live, real-time help at the point of sale can drastically reduce shopping cart abandonment rates and increase your buy-to-browse ratios. 38% of online consumers surveyed by Forrester Research have said that they had completed a purchase thanks to a live chat session.
- ▶ Choose a live chat and collaboration solution that allows agents to conduct multiple chat sessions simultaneously, thus increasing their productivity and significantly reducing your cost per live interaction.
- ▶ The use of advanced cobrowsing and collaboration capabilities in combination with realtime chat or click-to-call on your website can enable your agents to deliver superior, complete service by providing step-by-step, collaborative guidance to customers at the point of sale. Not only does live web collaboration reduce resolution times, it has high satisfaction ratings, high recall value, and it trains your customers to help themselves during similar transactions in the future.

# Evaluating Customer Service Management Solutions

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In this section, we have created a checklist of capabilities to look for in a customer service solution along with some metrics to help in your evaluation of various solutions for next-generation customer service.

## General Requirements

▶ Self-service support	<ul style="list-style-type: none"><li>▶ Does the solution have web-based self-service capabilities?</li><li>▶ Which modes of self-service does it support (e.g., FAQs, case tracking portals, virtual agents, guided help)?</li><li>▶ Does the solution allow the escalation of self-service sessions to assisted service while preserving the context of the customer's self-service session?</li></ul>
▶ “Best-fit” cross-sell	<ul style="list-style-type: none"><li>▶ Does the solution enable agents to cross-sell and upsell to customers? If so, how does the solution enable this capability?</li></ul>
▶ Informed, knowledgeable agents	<ul style="list-style-type: none"><li>▶ How well does the knowledge base accommodate the diverse needs of multiple enterprise-wide contact center environments?</li><li>▶ How well does the knowledge base support multiple access methods to the same content? Does it offer different access methods to novice and expert agents?</li></ul>
▶ 360° view of customer information	<ul style="list-style-type: none"><li>▶ Does the solution offer a single, unified, enterprise-wide view of the customer across all interaction channels?</li><li>▶ How does the solution access customer information that resides in third-party systems within the enterprise?</li></ul>
▶ Security and privacy	<ul style="list-style-type: none"><li>▶ How does the system ensure that access is restricted to authorized users only?</li><li>▶ How does the system handle privacy requirements when sending out sensitive or confidential information to customers?</li></ul>

## Administrative Requirements

▶ Security model	▶ Does the solution allow the restriction of access to certain knowledge base articles, interactions, and other information based on user authentication criteria?
▶ Upgrades	▶ Does the solution allow upgrades to newer versions while conserving customizations in business logic without requiring significant programming effort?
▶ Technical support	▶ Does the solution offer functionality for remote support and diagnostics for use in internal and external technical helpdesks?
▶ Multi-tenancy	▶ Does the solution provide support for multi-tenancy? ▶ Does it allow the centralized administration of all departments and partitions? ▶ Does it allow multi-tenant reporting, i.e., unified, global reporting across all departments and partitions in the system? ▶ Does it support fault-isolation capability across the tenants in the solution?
▶ Application management	▶ What application management capabilities does the solution offer?
▶ Real-time and batch processing	▶ Does the solution provide support for both real-time and batch processing of incoming inquiries for increased efficiency?
▶ Auditing and monitoring	▶ Does the solution provide audit trails for all inbound and outbound communication across all interaction channels? ▶ Does it provide audit trails of modifications in knowledge base articles?
▶ Backup, archival, and recovery	▶ How easy is it to perform full backup, restoration, maintenance, and disaster recovery processes for all system and application software as well as databases and any related files? ▶ Is it possible for agents to perform searches on archived customer and interaction information?

## User Requirements

<ul style="list-style-type: none"> <li>▶ Multichannel support</li> </ul>	<ul style="list-style-type: none"> <li>▶ Does the solution support multiple channels?</li> <li>▶ Are these multiple channels integrated? If so, how?</li> <li>▶ Does it allow unified workflow across all channels?</li> <li>▶ Does it provide unified customer information and history across all channels?</li> <li>▶ Does the solution provide a single, unified knowledge base across all channels?</li> <li>▶ Does the solution allow seamless, context-sensitive escalation across all channels?</li> </ul>
<ul style="list-style-type: none"> <li>▶ Knowledge management</li> </ul>	<ul style="list-style-type: none"> <li>▶ Does the solution offer unified knowledge management capabilities for contact center agents and end customers?</li> <li>▶ Does this solution support multiple authorization levels in the creation and modification of knowledge base articles?</li> <li>▶ Does the knowledge management system support the authoring, search, and retrieval of information in multiple languages within the same knowledge base?</li> <li>▶ Does the solution provide access to pre-existing, unstructured knowledge within an enterprise?</li> <li>▶ Does the knowledge management system provide varying levels of guidance and support to novice and expert agents?</li> </ul>
<ul style="list-style-type: none"> <li>▶ Agent training</li> </ul>	<ul style="list-style-type: none"> <li>▶ Can the knowledge management solution help in reducing the training time for contact center agents? If so, how?</li> </ul>
<ul style="list-style-type: none"> <li>▶ Dynamic process flows</li> </ul>	<ul style="list-style-type: none"> <li>▶ Does the solution enable the creation of automated workflows through the integration of rules-based engines with back-office or other production systems?</li> </ul>
<ul style="list-style-type: none"> <li>▶ ERP and CRM data integrations</li> </ul>	<ul style="list-style-type: none"> <li>▶ With which CRM and ERP systems does the solution integrate?</li> </ul>
<ul style="list-style-type: none"> <li>▶ User reports</li> </ul>	<ul style="list-style-type: none"> <li>▶ What types of user productivity and efficiency reports does the solution provide?</li> <li>▶ Does the solution allow the creation of custom reports to match the specific needs of organizations?</li> </ul>

### Executive Requirements

▶ Integrated multi-site, multi-product contact centers	▶ Does the solution support deployment across multi-site, multi-product contact centers within an integrated service framework?
▶ Real-time executive reporting	<ul style="list-style-type: none"><li>▶ Does the solution have realtime reporting capability?</li><li>▶ What types of reports does it provide out-of-the-box?</li></ul>
▶ Enhanced customer and employee satisfaction	<ul style="list-style-type: none"><li>▶ Does the solution provide reporting capabilities that reflect customer experience and service levels?</li><li>▶ How does the solution enforce service levels?</li></ul>

### Channel Partner Requirements

▶ Access to product knowledge to support customers	▶ Does the solution allow remote users to access the centralized knowledge management system to help them support customers?
▶ Escalate contact center interactions and issues to the company	▶ Does the solution allow the escalation of issues from remote sales and distributor sites to a single, unified customer service framework?
▶ Reporting requirements	▶ Can the solution aggregate data across multiple, remote locations to perform unified reporting across all sites?

## Platform and Architectural Requirements

▶ Scalability	▶ How scalable is the solution?
▶ Flexibility	▶ How does the solution's architecture serve to ensure both compatibility and flexibility for the future?
▶ Standards and interfaces	<ul style="list-style-type: none"><li>▶ Does the solution have open interfaces for integration with external applications?</li><li>▶ Does the solution support industry standards like Java and Web Services?</li></ul>
▶ Hardware requirements	▶ What are the hardware requirements for the solution?
▶ Integrations	▶ How does the solution integrate with external systems?
▶ New application development	▶ Does the solution provide open APIs for the development of new functionality using standard development tools?
▶ Configuration management	▶ Does the solution support deployment in development, QA, and staging environments?

## Next Steps

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As a solution provider committed to helping businesses differentiate themselves through best-in-class customer interactions, eGain offers a complimentary, no-risk, no-obligation assessment of your current customer service and support operation in the form of a Best Practice Assessment Study (BPAS). Based on your priorities, the BPAS can be focused on the specific topic of this document or your broader contact center and customer service operation. If you found the content of this document to be useful, we are confident you will benefit from a BPAS engagement with us. To qualify, send us an email at [info@egain.com](mailto:info@egain.com). We will contact you to set up a mutually convenient time to conduct a BPAS.

## Related white papers in the eGain Library

eGain is a pioneer and innovator in customer service and knowledge management software with an array of industry-first innovations. Our white papers reflect the expertise we have gained from hundreds of successful contact center and customer service software deployments at blue-chip companies around the world. You can view our best practice white papers and innovation briefs at [www.egain.com/resources/white-papers/](http://www.egain.com/resources/white-papers/).

## About eGain

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eGain's customer engagement solutions power digital transformation for leading brands. Our top-rated cloud applications for social, mobile, web, and contact centers help clients deliver connected customer journeys in an omnichannel world. To find out more about eGain software, visit <https://www.egain.com/products/>.

Headquartered in Sunnyvale, California, eGain has operating presence in North America, EMEA, and APAC. To learn more about us, visit [www.eGain.com](http://www.eGain.com) or call the company's offices: +1-800-821-4358 (US), +44-(0)-1635-800087 (EMEA), or +91-(0)-20-6608-9200 (APAC).

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