

Extending the Case Management Customer Service Ecosystem



Introduction

Case management suites evolved out of workflow and business process management (BPM) applications as organizations began to understand that some business processes are complex, unpredictable and require flexibility and human decision making during their execution. As a result, many leading customer relationship management (CRM) vendors now offer case management capabilities reflecting an emerging consensus that process automation or simply locking employees into inflexible business processes will not transform customer service.

One of the consequences of the automation of some customer service processes and the drive toward customer self-service and the digitization of customer service channels is that when a customer call reaches the service desk, it is typically one that is unpredictable and not easy to solve. As a result, customer service employees still have a crucial role to play in the digital world and must have deeper knowledge, a wider skill set and access to a wide variety of business applications to progress the customer issue. Case management suites address this problem and support the employee through integration to content management, CRM, employee collaboration tools, knowledge management and legacy databases. Many case management applications have gone further and now include knowledge, collaboration and content management capabilities. As case management suites increasingly make their way into the heart of customer service, other opportunities for enterprise integration and extending the case management ecosystem exist, which can further improve how cases are executed and drive improved customer service and productivity.

Omnichannel Integration

The digitalization of customer channels is a major challenge for established organizations across multiple industries as they struggle to fulfill the engagement requirements of a new generation of customers while continuing to support the traditional channel preferences of existing and mature customers.

Yet customers don't really care about channels, and the case management application shouldn't either. Customers don't think in terms of channels when they want to engage with an organization. They choose the channel that is most convenient to them based on their context. In addition, many customers will begin an engagement via one channel (e.g., webpage) and continue it on another (e.g., through a chat session or via the phone). The case work queue must be able to accept and link work from all of these customer channels and use business configurable rules to ensure that it is prioritized and allocated to the right employee. For example, a customer's social media engagement requires a more rapid response rate than an email engagement. Its nature may also require management by employees with marketing and communications skills.

The challenge for organizations is to create a seamless customer service experience no matter what channel is chosen by the customer. Extracting value from digitalization and transformation efforts can be fully realized when the optimized customer interface is integrated with optimized business processes.



Workforce Optimization

The traditional view of the customer relationship as a simple dichotomy between the competing needs of the business for improved productivity and efficiency and the needs of the customer for improved service levels and increased satisfaction is no longer valid. There are three stakeholders in the customer service relationship—the customer, the business and the employee. Many businesses looking to improve their customer service using CRM and automated workflows struggle because they don't recognize the key role employees play in transforming customer experience. Attempts to automate the employee out of the customer service equation using simple workflow solutions often backfire, delivering a short-term cost reduction but ultimately creating long-term customer dissatisfaction and frustration.

What differentiates case management from BPM is its focus on the needs of the employee. To deliver ongoing process excellence, organizations also need real-time information and insights into how their employees are performing and must manage their human resources to ensure they have the right number of employees—with the right skills—in place at the right time.

Workforce optimization and case management are complementary technologies. Workforce optimization helps organizations understand the performance of their employees. This insight can then be used to help balance workloads, optimize resources and thus drive down process latency, increase throughput, meet service goals and improve quality and compliance. In addition, workforce optimization can be used to identify employee e-learning and coaching requirements, thereby driving continuous improvement in employee performance.

Enterprise Feedback Management

One of the key benefits of the case management suite is its ability to rapidly adapt processes in response to market changes. Triggers for process change often come directly from customers. By integrating an enterprise feedback management application with the case management suite, organizations can also ensure that not only can the voice of the customer be received, but also that the customer feedback can be used to automatically trigger back-end, multidepartment customer service processes, such as complaint management and refunds. Ongoing customer relationships can be improved by linking completed surveys to case history and customer contact details. Survey response rates can be increased by tightly coupling customer feedback from an ad-hoc activity into an essential stage of your customer service processes.

A key advantage of dynamic case management applications is that they can be rapidly adapted in response to changing business requirements. These changes must be made based on real-time information on the market, your customers and your employees. Customer channels, workforce optimization and enterprise feedback management integration can extend the case management ecosystem, providing real-time inputs and ensuring that customer service process improvement isn't a fire-and-forget exercise. It's an ongoing activity.



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