



## **Collaboration Is the Next Game Changer in Customer Service**

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## Executive Summary

For most companies, customer service is a continually evolving process. Customer demands are always in flux and there are always new methods of reaching customers, and competitive threats to the status quo. Organizations that wait too long to adapt run the risk of losing customers to more agile competitors waiting for the right moment to pounce. But do it right and the results can be staggering: happier customers, faster problem resolution, consistency in measurement — all at a lower cost.

It's for this reason that companies have looked to collaboration tools as a way of changing the face of customer service. While the tried-and-true telephone will always be a contact option, many customers want a whole new experience where chat, social media, video and self-service are the norm.

ZK Research believes the time is now for companies to use collaboration tools to evolve customer service. This report provides IT professionals and business decision-makers with practical examples and key insights into how four organizations implemented collaboration technologies and used them to transform customer service.

## Section I: Collaboration Has the Power to Transform Customer Service

Organizations large and small are continuously searching for ways to improve business processes, lower costs and improve profitability. Nowhere has this trend been more prevalent than contact center. The contact center is often the first and most frequent touch point between a customer and a company. A quality interaction means the customer is likely to do business with the organization again. A poor interaction can mean the organization loses the customer permanently or worse, the customer shares the negative experience with others.

The contact center has transformed several times over the past few decades, including the following three waves of focus and technology evolution (see Exhibit 1). Most contact centers have gone through the first two phases:

1. **Cost reduction:** During this wave, the focus is on lowering the effective cost-to-serve through more efficient occupancy strategies, better technology and infrastructure consolidation. This wave brings efficiencies to the customer management process to streamline every transaction.
2. **Relationship:** This wave focuses on improving the relationship with the customer through the customer-service agent. Organizations focus on optimizing the interaction by understanding customer context, then routing the customer to the best resource. Context factors can include customer's identity, location, order history, known preferences, or anything else that might profile the individual.



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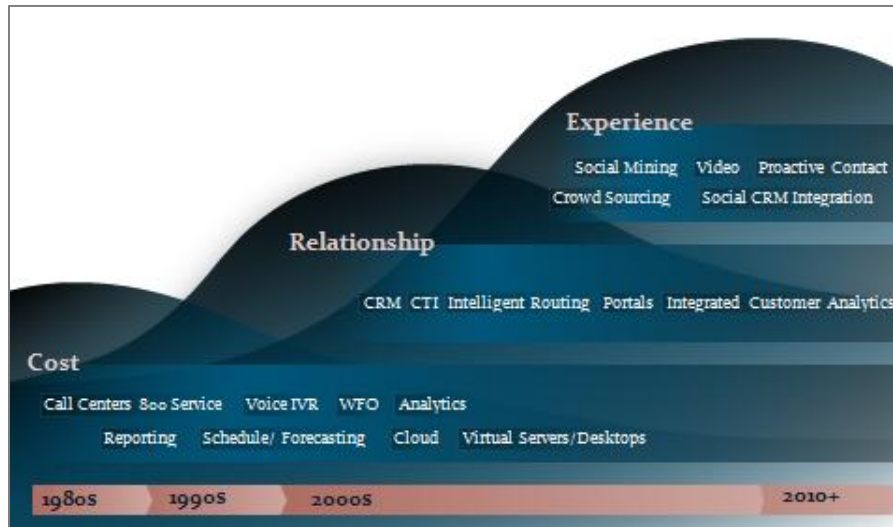
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*Influence and insight  
through social media*

3. **Experience:** Today, the industry sits on the precipice of another major transition — a focus on improved customer experience. During this wave, organizations focus on moving past typical interaction channels to enhance the experience with new media such as video, chat, mobile content and social media. This shift integrates tools typically used only by call-center agents for other customer-facing roles such as front-office, back-office, field-service and sales.

The experience phase increases customer loyalty, while improving the speed and close rate for sales. It brings together the various touch points into a manageable set of tools accessible to all individual stakeholders. To meet these challenges, companies have turned to unified communications and collaboration (UCC) platforms, which unite all collaborative applications including VoIP, presence, chat, conferencing, video, mobility and social media.

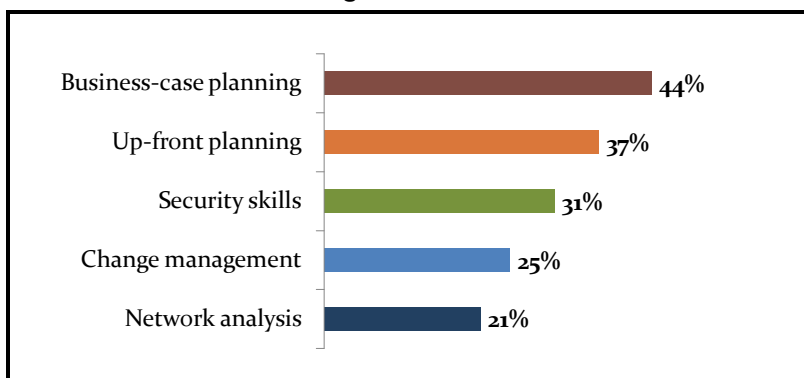
#### Exhibit 1: Customer Service Redefined



Source: Cisco Systems

UCC makes contact center agents more agile, responsive and collaborative, as technology breaks down distance, time and media barriers. Despite its multifaceted value proposition, companies can struggle to understand how to calculate UCC's business case and ROI. A recent ZK Research survey shows that business-case planning is the No. 1 skill organizations lack to roll out UCC (see Exhibit 2).

#### Exhibit 2: Business Case Planning Is a Challenge Which Skills Does Your Organization Lack to Roll Out UCC?



Source: ZK Research, 2012

ZK Research finds that because of the uniqueness of each company, developing industrywide metrics to predict corporate savings and user productivity increases is nearly impossible. However, by studying how certain organizations leverage the technology, companies can take best practices and apply them.

## Section II: Best Practices Case Studies

### Case Study 1: U.K. National Health Service

#### Key Benefits: Automation, cost savings, flexibility on demand

The National Health Service Business Service Authority (NHS BSA) is a special health authority of the NHS. The department provides a wide variety of nonclinical services across the entire NHS, both to support NHS professionals and directly serve the public, including NHS pensions, the NHS dental service, and the prescription-pricing service. The latter includes processing and reimbursement of approximately 65 million prescription items per month to 10,000 dispensing pharmacies in England, paying out around £9 billion per year to pharmacy contractors alone. Furthermore, NHS BSA provides European Health Insurance Cards (EHIC) to the U.K. population, with a customer base of 60 million.

#### The Customer Service Challenge

EHIC cards must be renewed every five years. The NHS BSA contact center was receiving an average of 30,000 calls per month from customers needing new cards. However, in some months, the number of calls spiked to 80,000 based simply on related news reports. The contact center was unable to deal effectively with such unpredictable spikes in call volume. The majority of calls were routine and straightforward application requests, giving agents less time to respond to more complex and detailed customer calls for other NHS services. This made forecasting demand for this large base of diverse individuals an immense challenge.

The NHS BSA could not meet customer-service demands when inbound calls spiked, and needed a cost-effective solution to address the peaks without downgrading service. It required a 24/7 self-service phone facility. Brendan Brown, head of operations and innovation, searched for a solution that offered:

- Ability to handle a variable high volume of calls for EHIC card applications and renewals.
- Customer self-service tools to extend customer contact beyond existing business hours.
- Cost-savings for U.K. taxpayers.

#### Solving the Challenge

NHS BSA recognized that building an internal solution was too expensive and time-consuming to be practical. The organization turned to Cisco and KCom Communications to build a cloud-based

solution to handle the call volume. The technology uses speech-recognition software to convert speech to text, and then verifies caller details such as name, address and NHS number against NHS databases.

Because it's a cloud-based application, the solution scales on-demand without interfering with existing infrastructure. Additionally, NHS deployed the solution using a risk-and-reward payment structure: KCom is paid only for successful transactions. This gave KCom and Cisco clear financial incentive to provide an effective system, which creates greater savings for NHS BSA and translates to better value for U.K. taxpayers. Each successful transaction costs £0.41, which is one-third the average cost of £1.20 per call by a customer service agent.

The solution was architected to route calls to virtual call-center agents, which avoided the need to hire additional agents. This highly flexible solution scales with no additional NHS BSA infrastructure. Transaction details are automatically transferred into a database, which produces the EHIC card.

#### Transforming the Business

Prior to implementing the collaboration solution, call-center staff handled all EHIC calls. Since the system now automates a large number of calls, the staff is free to handle more complex inquiries, train for alternative call streams and build other skills. Today, almost 3,000 calls go through the automated system.

Without the automated system, NHS BSA would have been unable to complete its inbound renewal requests. The solution delivers huge cost-savings: The automated transactions provide a 65 percent savings over manual transactions.

The NHS BSA first implemented a voice-automated contact-center solution in late 2009. The past 12 months have seen the highest number of automated calls, and some extreme variations in demand. Since inception, more than 1.15 million calls have been automated, for a net savings of £536,000; savings for the last 12 months are in the vicinity of £300,000. Other benefits are:

- The highest period of activity for the system was from August 2010 to July 2011, during which the system automated 652,000 calls which resulted in a savings of £298,737.
- Without automated voice technology, the NHS BSA would have needed at least 30 extra agents, peaking at 50 full-time agents in May 2011. This would have exceeded the center's physical capacity, incurring significant costs and logistical issues.

- The availability of contact-center staff has increased, freeing them to train on alternative call streams and improve their skills.

The collaboration enabled NHS BSA to achieve a level of customer service that was once thought impossible. Without it, the organization would never have been able to cost-effectively service the volume of U.K. citizen calls it does today.

## Case Study 2: Hilti Corporation

**Key Benefits: Global standardization, personalized service through caller ID**

Headquartered in Schaan, Liechtenstein, Hilti supplies the global construction industry with leading-edge technology. Hilti products, systems and services offer construction companies and professionals innovative tools and consumables.

*"Automation of the call center enabled NHS BSA to handle an unprecedented number of renewal requests at a significantly lower cost to the citizens of the U.K. We were delighted with the system from day one, and have benefited from further refinements ever since. We are confident the system will continue to deliver efficiencies."*

**Brendan Brown,  
Head of Operations and  
Innovation, NHS BSA**

Hilti employs approximately 20,000 individuals in over 120 countries around the world and prides itself on a culture of integrity, teamwork and commitment. Hilti's differentiation comes through its innovative, high-quality products and services, effective marketing and a direct-sales force. In fact, two-thirds of Hilti employees work in customer-facing positions and engineering, resulting in more than 200,000 customer contacts each day.

## The Customer Service Challenge

Hilti takes great pride in its customer service and considers it one of its biggest differentiators. In an effort to bring customer satisfaction and corporate productivity to new heights, the company sought to create global processes and standards.

The challenge was, each country had its own set of technologies, standards, processes and unique ways of measuring effectiveness. This made customer service and call handling difficult, which resulted in customer-service challenges, including:

- Differences in organization setup: In some countries repair was a standard part of customer service, in others it was not.
- Multiple call-segmentation and call-routing strategies: Some calls were routed by region, others by trade, etc.
- Difficulty benchmarking, due to organization structure and technical solutions.
- No common key performance indicators (KPIs) or goals.
- No standardized way of queuing and handling mailbox messages.

To add to the struggle, not only was each country a unique entity with its own infrastructure, most organizations seemed to lack a sense of urgency regarding the need to improve.

## Solving the Challenge

To achieve the level of standardization desired, Hilti did thorough analysis of its customer-service strategy. It looked at each country's process and customer service setup, KPIs, customer data and telecom strategy. The result of the analysis was to seek out a collaboration solution that would:

- Standardize the way Hilti deals with customers across the organization, ultimately creating better, more personalized service.
- Standardize call, email and fax routing through a multichannel contact center.
- Improve agent productivity by allowing caller recognition based on phone numbers in the customer database, triggered by an ERP screen pop and permitting a personalized greeting.
- Improve customer satisfaction through skills-based routing to send calls to the most qualified call-center agent.
- Allow Hilti to interact with customers using voice services as well as email and fax.

- Be managed centrally as a global system.
- Have a single collaboration solution with global features including multilanguage support, robust reporting capabilities, and multichannel routing.

This IT project was of high importance, and the highest levels of executive support. Hilti engineers for UCC infrastructure issued the RFP for the global solution, which called for a vendor with:

- Global presence
- Financial stability
- A history of innovation

These tough criteria ruled out most UCC solution providers but left a small competitive landscape. After extensive evaluation, Hilti chose a Cisco solution, with HP as implementation partner. HP, Cisco and Hilti IT jointly designed and delivered a high-quality solution to meet the demands of a global organization. The plan was to start with Canada as a pilot deployment, then the U.S., and five countries twice a year until completion.

The architected solution was highly standardized, creating uniformity of features across the company. This allowed Hilti to create consistent processes and common APIs. The solution affected these areas:

*"We needed an enterprise-ready solution to allow us to implement a global solution. Cisco provided a high-quality, solid foundation to standardize service. The solution, particularly the voice portion, easily met our challenging environment and this will enable us to create even more ways of interacting with our customers. Optimization steps have been and are still being executed in order to improve the Cisco Unified E-mail Interaction Manager further."*

**Wolfgang Speckle, Hilti**

Contact center:

- A predefined set of features and functions mandatory for each country, with an additional set of optional features for local needs
- Hilti brand management defines and approves customer-facing features including announcements, email signatures, and fax templates
- Each agent has an identical work space, including two screens, phones and headsets

Call processing

- Standardized hardware configuration for phones and gateways
- Standard dial plan for each location

### Transforming the Business

Prior to deployment, Hilti customer interactions were inconsistent, making it difficult to measure the effectiveness of each country or organization. The deployment of Cisco collaboration technology allowed Hilti to achieve the level of standardized tools, processes and KPIs desired to optimize the way it deals with customers.

Hilti had an ambitious rollout schedule; the solution is now deployed in 34 countries to 1,200 agents, resulting in 320,000 calls per month plus an additional 170,000 emails and faxes per month. Based on the results from the deployment to date, Hilti achieved the following benefits:

- Standardization of customer-service KPIs, including average speed of answer, service levels, abandonment rate overflow and availability.
- Overall productivity improvement of 5 percent, an average result of inbound hits per day, average talk time and recorded contacts per day per agent.
- Implementation of a common process across the company. Hilti moved inbound call routing away from geography-based routing and standardized on trade/sales-potential routing. Prepopulation of information to call-center agents helps identify customers by inbound call number. The goal was to have 60 percent of calls recognized — Hilti achieved a 65 percent level.
- Overall, the collaboration solution met Hilti's expectations as it allowed it to improve productivity and create new processes, all at a lower cost than the predeployment environment.



### Case Study 3: National Transportation Management Company

**Key Benefits: Multichannel contact options, Web-enabling manual processes, customer self-service, network foundation for continued evolution**

This nationwide company is one of the largest haulers in its segment. It owns its own storage facilities, transfer stations, and has more than 850 collection, transportation and handling facilities in 40 U.S. states and Puerto Rico. It provides top-quality services to residential, municipal and commercial customers.

The company operates as a collection of local divisions with distinct sub-brands. All parts of the organization operate with a single mission — to provide customers with service that exceeds the highest industry expectations.

#### The Customer Service Challenge

As the organization continued to grow through acquisition of local and regional companies, it found the ways it dealt with its customers were highly inconsistent. It found smaller regional competitors allowed customers to procure services via the Web, which had proven a fast way to do business. This is in sharp contrast with the way the company handled the process: when a call came in, a salesperson would physically visit the customer. This could take five or six days; far too long, considering the immediate turnaround the Web can offer.

The sales organization sought to more than double its business. The IT director knew this would require new ways of interacting with customers, based on customer preferences. This meant significant change, starting with a new collaboration solution with an interactive voice response system (IVR), online chat and Web interaction.

Also, the company used third-party suppliers to provide coverage for large customers in areas where they don't have offices. The only way this was possible was through manual methods such as faxes and phone calls. As part of the customer-service transformation strategy, the company sought a solution that allowed for multichannel communications with partners and customers.

Lastly, the collaboration solution needed to extend to individual residential consumers. Historically, the only interaction method for residential customers was by phone. The goal was to create a portal to enable self-service tools for customers to pay bills,

change and order service. The biggest problem with the legacy process was that since everything was manual, there were high amounts of human latency between each step in the process. This meant many processes took days instead of a few hours.

#### Solving the Challenge

IT had a vision of deploying a robust collaboration solution to enable the functionality needed today, and also evolve to meet future needs. The first phase of the solution was to deploy a common VoIP infrastructure to give all employees and agents consistent functionality.

However, since the organization envisioned its customers interacting through a variety of new methods, it also needed enhanced IVR, social media, mobile applications and video.

Because of the diverse feature set and the requirement to run over the network, the company chose a Cisco solution. Cisco offers a high-quality, feature-rich VoIP platform that can be built on a rock-solid network. Cisco also offers innovative collaboration applications, such as Social Miner, to enable the company to reach customers through social channels.

*“We were falling behind competitively because of old collaboration technology used for customer service. The new solution has allowed us to interact with customers in the way they desire at the time of their choosing, significantly improving customer satisfaction. As we look to the future, we expect the collaboration solution to enable new ways of dealing with customers and, in turn, create new revenue opportunities.”*

**IT Director, Transportation Management Company**

## Transforming the Business

Deployment of the collaboration solution met all of the company's initial customer-service challenges. Today customers can place orders, pay bills, or perform other tasks through the call center, the IVR system or the Web. Customers are no longer required to go into an office.

The company initially deployed the solution in five of its major markets. In those regions, the solution reduced call-center staffing needs by 20 percent, while customer satisfaction went "through the roof," according to the IT director.

Because the infrastructure and features are common across the deployment, there are now a common set of processes and metrics to measure effectiveness for each market or call-center agent.

Ultimately the company wants to reduce the number of call-center locations from 115 to 4 and shrink the total number of call-center agents from 1,500 to 600, while improving customer service. The new collaboration tools will play a key role in this: A good call center agent can only handle one phone call at a time, where a good contact-center agent using chat can deal with three or four concurrent sessions.

The benefit to the sales team is just as significant. Prior to deployment, the company lost deals to competitors because it didn't have the back-end infrastructure to update the sales process. Competitors had better access to account information and provided feature-rich self-serve portals for customers. Having eliminated that sales barrier, the company's national accounts have grown by approximately 25 percent to 35 percent, putting them well on the way to doubling the business. Without self-service, Web and email workflows, the company would not have experienced nearly that level of growth.

The company now has the infrastructure to put in a very durable, consistent customer-service framework that increases both customer-satisfaction rates and sales. To build on this success the following customer-service transforming goals were identified:

- Creation of tiered sales agents: Many sales can be handled on the phone instead of in person. This means millions in sales will never go through the typical sales channel, eliminating the need to pay commissions.
- Using VoIP infrastructure, the company wants to leverage social media and mobile applications to track all sub-brands at the local level.

- The company is experimenting with on-board technologies in its vehicles, such as GPS to let customers log onto a portal and know exactly when a pickup will be done. With onboard video, the company can send a video of a loading area to a customer and offer to pick it up early — at a premium. Although the company isn't ready to implement video, the foundation is there.

The company has streamlined many processes, significantly reduced headcount and costs, and is looking at additional new functionality to improve its competitive edge. Its robust collaboration platform is leveraged today, and can support new features when the business requires it. The company invested \$9 million in the solution and is ready to spend another \$2.5 million — but expects the solution to pay for itself in 3.5 years.

Old customer service tools and processes put the company in a significantly weak position compared to its competition. Closing this gap required new processes and tools, which was impossible with the company's legacy tools. Implementation of a network-based solution enables the company to deal with customers in new ways, which leads to new revenue streams and improves close rates.

## Case Study 4: AAA Western & Central New York (WCNY)

**Key Benefits: Integrated phone and Web systems, customer profile building, customer analytics, persona-based call routing**

The American Automobile Association (AAA) is a federation of 57 independently owned auto clubs throughout the U.S. and Canada. AAA is a not-for-profit member-service organization with approximately 53 million members. It provides a variety of core services to its members, including emergency road service, discounts, leisure travel, tour books, maps and full-service insurance.

AAA WCNY is a local auto club that serves 22 counties in upstate New York, representing a population of 2.4 million people of driving age, of which 880,000 belong to AAA WCNY. Members average 6.5 million interactions per year.

Of AAA WCNY's approximately 650 employees, 160 people work in retail locations focused on selling memberships, travel packages, and home, life and auto insurance. Another 150 employees are located in AAA WCNY call centers.



## The Customer Service Challenge

CIO Bob Leach joined AAA WCNY in 2008 and started to develop a customer-service transformation plan for 2015. AAA travel segments were under assault from online travel portals and the technology trends were not favorable. While the business was still healthy, the demographics of people using AAA WCNY travel services indicated that, if nothing changed, the market opportunity to compete in travel services would be minimal.

This caused the company to ask, “Why do people still go to a travel agent?” In 2008, travel Web sites were soaring and video content was beginning to populate portals. This was the primary driver for AAA WCNY to change the way its professionals worked.

Leach recognized customers go to agents to talk to someone with first-hand knowledge of the places they want to travel. Thinking to 2015, to remain relevant with people as the primary interface, AAA WCNY would need to change significantly. Their professionals would need tools to alert them to multimedia content to use in a highly collaborative way. The 2015 vision was that it would be common to collaborate with members in their living rooms instead of physical locations, via online video.

The customer-service challenge that drove the vision for change was to find a way to provide members the best possible experience with the most qualified person. This meant AAA WCNY needed a collaboration solution that was smarter, knew the identity and interests of each member, and could match them with the best employee.

## Solving the Challenge

In 2008 the AAA WCNY emergency service center ranked No. 1 in satisfaction for all AAA call centers. But Leach knew this would be insufficient in 2015, and was willing to break everything up to prepare. The vision was for customer-facing collaborative and multimedia capabilities that far exceeded anything any other travel agent had.

For telephony and call center, it found a vendor with a similar vision. AAA WCNY went with an all-Cisco solution including telephony, video, call center and all the underlying network and server infrastructure. For a few pieces of workflow, Cisco brought in partners such as Calabrio to deliver functionality, primarily workforce optimization, desktop agents and computer-telephony integration (CTI).

AAA WCNY's solution transformed customer service by capturing customer information in real time, and

using it to help agents make informed decisions. For example, when members log into the AAA WCNY Web site and browse vacations, the information is captured and stored in the back-end system.

AAA WCNY also developed a set of customer personas to map individuals to categories that describe what kind of traveler the individual is, what accommodations they like, where they like to travel, and what budget they have. The vision is to use the personas to determine how to route inbound calls for the best possible match between member and agent. It costs no extra money to route calls, so there is only upside. Considering AAA WCNY receives 1.2 million inbound calls per year and 400,000 walk-ins, understanding who customers are and how to optimize their experience is key in creating the differentiation for the 2015 vision.

*“The Internet, social media and travel portals created a situation where anyone can access basic travel information whenever they want. The challenge for AAA WCNY was to create a personalized experience above and beyond what customers have today. A robust collaboration platform allows us to transform our business to a point where we have revenue, profits and customer service at an all-time high. This was only possible by first evolving the underlying collaboration technology, then creating a new business processed on top of it.”*

**Bob Leach, CIO, AAA WCNY**

## Transforming the Business

The new solution puts AAA WCNY well on the way to its 2015 vision. Some of the ways customer service at AAA WCNY is seeing results include:

- Deep modeling capabilities use the data warehouse to trigger actions for printed material.

Each of the last nine travel catalog mailings saw improved results. Today the hit rate on mailings is significantly north of the industry average of 2 percent. Improved analytics identify whom to approach with printed material, which often triggers a member to visit the Web site, capturing more profile information.

- Web experience is greatly enhanced. When a member finds something of interest, he or she can click to initiate a phone call, and the agent sees where the customer was on the site. (The agent can address the customer by name; Leach feels most customers aren't ready for a session this personalized.) Agents can access more than 600 videos and have data to know which relate best to each member's interests.
- The collaboration platform resulted in a significant jump in closure rates for sales agents. After processes were re-engineered and staff retrained, closure rate in local offices increased significantly. Prior to deployment, the closure rate was 60 percent. Today it sits at 80 percent.
- A significant boost in top-line revenue. Although 2009 was a terrible year for the entire travel industry — easily the worst since 2001 — AAA WCNY saw travel revenue grow by 33 percent.

The growth AAA WCNY has seen in its business, profits and customer satisfaction, even in a down year, could not have been realized without evolving the collaboration technology.

Like so many business today, the travel industry is highly competitive. AAA WCNY found it must either transform the way it deals with customers or face the rapid decline of its travel business. Deployment of a foundation collaboration solution has not only helped it close the gap competitively, but create new interaction methods once considered impossible for the company. Transformation of customer service at AAA WCNY travel enabled it to reach new levels of revenue, profits and customer satisfaction.

### Section III: Collaboration Transforms Customer Service

Businesses across the globe are experiencing similar challenges when it comes to strategically transforming customer service. Understanding the potential impact of customer service transformation is critical for all IT and business leaders.

The three waves of evolution are a guide for organizations as they update their customer-service organizations. ZK Research believes these case studies reflect the three phases all companies face.

The first area of focus should be to **reduce costs** associated with the contact center. This can best be done with Web self-service tools, IVR, robust reporting and shifting more functions to the cloud.

The cost savings can often be significant, as the U.K.'s National Health Service realized. With cloud-based, self-service tools as an alternative to the call center, the organization lowered the cost of each transaction from £1.20 from £0.41. Net savings to date is £536,000, of which £300,000 came in the last 12 months alone. Additionally, the NHS avoided hiring 30 extra agents for peak periods of demand.

Another example is the U.S. transportation management company. The organization implemented self-service tools to allow customers to submit orders, pay bills and other tasks. This alone reduced call center staff by 20 percent.

The second area where companies should focus is **improving customer relationships**, which can be done by through the intelligent call routing and integration with customer systems such as CRM.

Hilti Corporation used a next-generation call center solution to standardize on a consistent set of KPIs across the company to measure the effectiveness of each customer interaction. The standardization took place across 34 countries, with more than 1,200 agents handling over 320,000 calls per month.

Hilti used the information to help better understand the needs of its customers and achieved 65 percent accuracy when automating calling identification. This handily beat the internal goal of 60 percent the company had at the inception of the project.

The company also implemented both Web and chat interaction as new ways of reaching customers to further enhance customer experience.

Another proof point was the U.S.-based transportation management company. In addition to cutting costs, customer satisfaction skyrocketed, allowing the national accounts group to grow its revenue by 25 percent to 30 percent.

The third area of focus for companies looking to evolve customer interactions is **to create new customer experiences**. This can be accomplished by integrating social-media tools and video into existing customer-service processes.

The travel agency function of AAA WCNY was under attack from online travel portals. To survive, it had to change the way it served its customers.

AAA WCNY implemented a call center with Web and video tools. In addition, it gathered as much information as it could on each member through online transactions, phone calls and in-person transactions. The end result was that not only did the travel business survive; it reached new heights while the overall industry was in decline.

After processes were re-engineered with the new collaboration tools, sales closure rates jumped from 60 percent to 80 percent. During 2009, a bad year for the travel industry overall, the company saw revenue jump by 33 percent.

This is similar to the impact to the sales team for the transportation management company: Customer interaction improvements coupled with video have created new revenue streams.

## Section IV: Conclusion and Recommendations

The business environment is moving at a faster pace than we have ever seen. New market leaders are crowned, while established names fall by the wayside. At the center of this battle is the customer. Organizations have moved past trying to improve business through basic cost reduction and incremental process change. Maintaining an established customer base for repeat business and attracting new customers has to be at the top of every business leader's priority list, making transformation of customer service imperative for technology and business decision-makers.

While the four case studies above were each unique, they indicate some similarities when transforming customer-service organizations and processes. ZK Research recommends the following steps to companies considering deploying collaboration software as part of a customer-engagement improvement strategy:

- **Start with a vision of the future of customer service:** CIOs, IT leaders and business leaders should look at their organization's customer base at least five years out and plan a strategy to address today's challenges and future ones.
- **Consider the customer contact center as a virtual, enterprisewide service — not just a physical location:** The process of learning about, understanding and responding to customers must be orchestrated across a variety of people, processes and systems both inside the organization and beyond.
- **Evolve customer interaction beyond voice:** This is an absolute imperative. Even if customer-service scores are high, customers demand to access organizations with voice, chat, social media, Web and — increasingly — video. There is no single right answer when dealing with customers, so it's important to offer services through a variety of channels to allow customers to deal with your company on their terms.
- **Automate repetitive customer interactions whenever possible:** You can use network-based collaboration tools to automate simple, repetitive tasks. Removing the human from the interaction reduces the likelihood of error and can speed up customer interaction times.
- **Think process transformation, not improvement:** Collaboration tools are a great way to streamline existing processes, and can provide significant value to the company. However, consider developing new processes that were not possible before, through use of video, chat, mobility and social media.

The experience wave of customer service is upon us, and using collaboration tools to transform customer service can pay significant dividends. To fully capitalize on this, companies must be willing to look past process improvement and think about what's possible tomorrow — and build toward that vision today.