Navigate Staff through
Customer Queries

A CLEVVA **Contact Centre Financial Services** Case Study

The background

A large South African vehicle and asset finance company's contact centre offers support to a broad range of client support queries. This help is varies from account queries to product information requests.

To service the wide range of possible queries, specialized teams were set up. The IVR system ensured upfront query categorization so that specific calls were channeled to specific agents.

The agent attempts to diagnose the root cause of the customer query, and then looks to apply the relevant procedure guidelines to resolve the query in line with company policy.

 Whenever an agent is unable to effectively resolve the query, they second tier the call to a small team of specialists to resolve.

The challenge

The contact centre faced a number of cost and service quality challenges that needed urgent attention. These included:

The varying call volumes across different query categories resulted in sub-optimal workforce utilisations, with certain specialist teams being idle while other teams were overwhelmed. Given the specialized nature of the calls, agents could not easily be transferred across teams.

It was taking around 6 weeks to formally train new agents, with many agents taking a further 3-6 months to be deemed competent on the floor.

This lead time reduced the reaction time of the contact centre to respond to changing customer demands.

Given the complex nature of most calls, a sizable percentage of calls were being sent to the experts (second tiered). This was influenced by the agents fear of making a mistake, given the fiduciary requirements being placed on any client advice.

Policy and procedure changes were relatively frequent, and keeping agents up to speed with new changes was proving problematic

The free text call reports varied dramatically in detail and quality, making follow ups and reporting very difficult.

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The requirement

The contact centre management team was looking for a solution that would deliver on the following key requirements

- Ability to have multi-skilled teams, capable of handling any call category
- Improvement in first call resolutions
- Improvement in call reporting
- Improvement in client service ratings
- Reduction in errors
- Reduction in the time it takes to get a new agent performing effectively

The solution

CLEVVA was selected as the solution, and a small team of internally trained CLEVVA authors worked with the contact centre team to capture all the diagnostic logic that the few experts were applying to resolve all known query types. The team initially leveraged the detailed process documentation available on the knowledge base, but found that much of the implied logic was missing. This was then filled in during workshops with key subject matter experts within the business.

The resulting solution was accessed by the agents via an icon placed in their taskbar, and the Navigator was viewed via a second screen. The logic allowed all agents to diagnose the root cause of any inbound query, and to effectively resolve it while working on the operational CRM system. The CLEVVA summary report ID was then copied into the CRM call report field to offer the call details for the Quality Assurance team.

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The results

1. **First call resolutions dramatically improved,** with agents being enabled to resolve all known call queries themselves
2. Training was reduced by 40%, primarily in the content areas focused on the policy and procedural details normally required to resolve call queries. More of the training focus shifted to call handling skills, where agents could focus on optimizing the call experience.
3. Agents were capable of handling any query type covered by the Navigator. **This allowed for easier deployment of a**gents to meet changing call volumes.
4. The CLEVVA summary provided at the end of every call detailing every question asked, every answer given, and every action taken replaced the need for free text summaries. This **meant accurate call reporting that lowered quality assurance risk**. This data was also exported into various reports to analyse call trends.

As a result of these results, phase 2 is being planned. This includes the integration of CLEVVA into the internal CRM. Phase 3 will then look at the deployment of customer self service (via a web portal) leveraging off the same logic.

The benefits

CLEVVA enabled the contact centre team to deliver a consistent, compliant level of service to all customers without the historic risk of varying agent knowledge and experience. No matter who answered the call, the customer would be asked the same questions, offered the same answers, and experienced the same outcomes. And with the future deployment of customer self service, this fundamentally changes the contact centre's ability to deliver a cost-effective service across a growing customer base.

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