Front Office Automation.
The Power of Conversations.

Conversations Matter

Conversations connect. They function as an 'integration' layer between people, allowing us to share information with each other. The data we share is not only through words. It is also how words are expressed. Our facial features and tone can sometimes provide more data than the words we use.

We use conversations for different purposes. Some conversations focus more on building relationships, and less on getting something done. Here the value we seek is from the feelings generated and the connections established. It is when form can trump function. Where how we say something is as important as what we said. And where we are more concerned with having an effective conversation than an efficient one.

In general, we find that these relationship building conversations are still best conducted in person.

Other conversations don't have the dependence on being conducted human to human. These are typically 'actioning' conversations. Where you are having the conversation to get something done. Like a request actioned, a product purchased, or query resolved.

With these conversations, we are often happier to sacrifice form over function i.e., we will spare the niceties if it means getting the outcome we seek.

In other words, while efficiency and effectiveness matter, we are less concerned about how the conversation makes us feel.

With these task-focused conversations, people are more willing to have this with a competent virtual (non-human) agent than a less competent human agent. The key factor is that they get the desired outcome achieved as quickly and easily as possible.

Conversations That Get the Job Done

Within many companies, especially those operating in regulated industries, conversations designed to get a job done tend to be guided by business processes. This is because the company cannot afford for these conversations to be had in an inconsistent, non-compliant way. Rules must be applied in a specific way, with evidence to prove it. Data gathered during these conversations must be correct and accurate, and captured in the right format for required back-office processing.

The logic of these conversations is often captured into procedural manuals using process flows and decision trees. This logic is then learned by front office staff so they can apply it when having these conversations with customers, suppliers, and employees. The expectation is that staff do not try self-learn or improvise. They are required to have these prescribed conversations in line with defined business process rules, every time.

To ensure these conversational processes get applied correctly, quality control supervisors often listen to recordings or observe staff in real time. Feedback loops and retraining are then provided to try help staff improve their accuracy in replicating the prescribed conversational formula.

The challenge with scaling this human-powered model is that every person is different. How they learn, remember, and apply a conversational process varies. Every situation differs and the decision tree logic they are asked to follow seldom reflects this.

As a result, these conversational processes tend to be applied inconsistently across the company. And as customer demand increases, the challenge of hiring enough competent front office staff to have these one-to-one conversations increases.

The cost of human-to-human conversations

When one calculates the actual cost of conversational processes performed by humans, it often surprises. We seldom factor in the full costs of recruiting and selecting, training, and supporting front-office staff to have the conversations we need them to have with our customers, suppliers, or employees. Add to this the cost of errors resulting from incorrect application of the rules – costs from rework, compliance, lost sales, reputational damage, and customer loyalty.

In addition, human-to-human conversations are non-concurrent. One hundred contact centre agents can only have one hundred customer conversations at a time - unless they are having live chats where they can cope with a few conversations at once. Either way, there is a limit to the number of conversations that staff can have with customers.

When customers are global and wish to engage with your business at any time of the day and night via the channels of their choice, the cost of having enough skilled staff ready to have these conversations is significant.

The Conversations That Chatbots Can Automate

To try reducing the cost of task-focused conversations, many companies have employed the services of Conversational AI-powered chatbots. These chatbots use natural language understanding and processing, as well as machine learning to understand what customers are saying and to understand the content (corpus)

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made available to provide the most accurate answer.

These question-and-answer machines (QAMs) are best suited to handling task-focused conversations that relate to specific informational or transactional requests.

In other words, when there is a clear ask, they can use their cognitive capabilities to search for and find the most probable answer. Or increasingly they can generate their own response based on content they have learned.

However, as soon as the purpose of the conversation expands to a contextual request, query, issue, or complaint that requires the application of a more complex conversational process, the logic limitations of these chatbots maxes out.

Examples include conversations where customers, suppliers or staff require guidance or advice in their decision-making. When they ask "What is the right product for me?", "What has happened with my payment?", "Can I take maternity leave?" or "How do I fix my Wi-Fi?".

Where the answer depends on the context and the process of finding the answer is a two-way diagnostic journey.

At this point, the chatbot typically hands the conversation over to a human agent to take over and complete, usually via live chat.

This is why chatbots are often called digital assistants and not digital experts. They can offer a level of assistance, but still rely on the customer and other staff to manage the decision-making process.

The Front-Office Processes That Business Process Mapping Tools Automate

For those front office processes that are linear and may involve a high level of data provision and collection, webforms and apps are very effective.

Examples include filling out an order form, capturing updates to personal details or viewing specific account details.

As long as the intent is clear, and the resulting process is defined to execute that intent, completing these processes via a two-way conversational flow is often not required. A user-friendly app, web form or set of form fields works perfectly well.

However, like with a chatbot, as soon as context matters and the journey through the process is not straight forward and linear, the engagement journey begins to break down. This also happens as soon as a customer requires decision-making advice prior to or during the data capture process, and/or when their contextual variables make standard forms unworkable.

When this happens, customers tend to break out and look to have a conversation with 'someone' who can help.

For more complex processes, where the journey is contextual and the most effective way to execute it is through a two-way conversation, Conversational Process Automation comes into play.

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What is Conversational Process Automation?

Conversational Process Automation (CPA) refers to the automation of processes, or parts of processes, which need to be performed verbally i.e., through conversational dialogue. These processes, typically performed by front-office staff e.g., contact centre agents or store sales and service consultants, often relate to the procedural logic required to resolve contextually rich sales, service or support requests, queries, issues, and complaints.

The role that a CPA platform typically takes is that of a Virtual Agent or a Digital Expert.

CPA bridges the gap between the conversational experience offered by Conversational AI-powered chatbots (giving an answer to a specific question) and the procedural structure and assurance offered by BPM (guiding someone through a data rich set of process steps and choices).

CPA offers both the conversational experience of Conversational AI and the procedural rigor of BPM.

It enables multi-dimensional, two-way conversations with customers, suppliers and staff that support process rules and capture required back-office system data in a format that enables straight-through processing.

Conversational AI **CPA** **Business Process Automation**
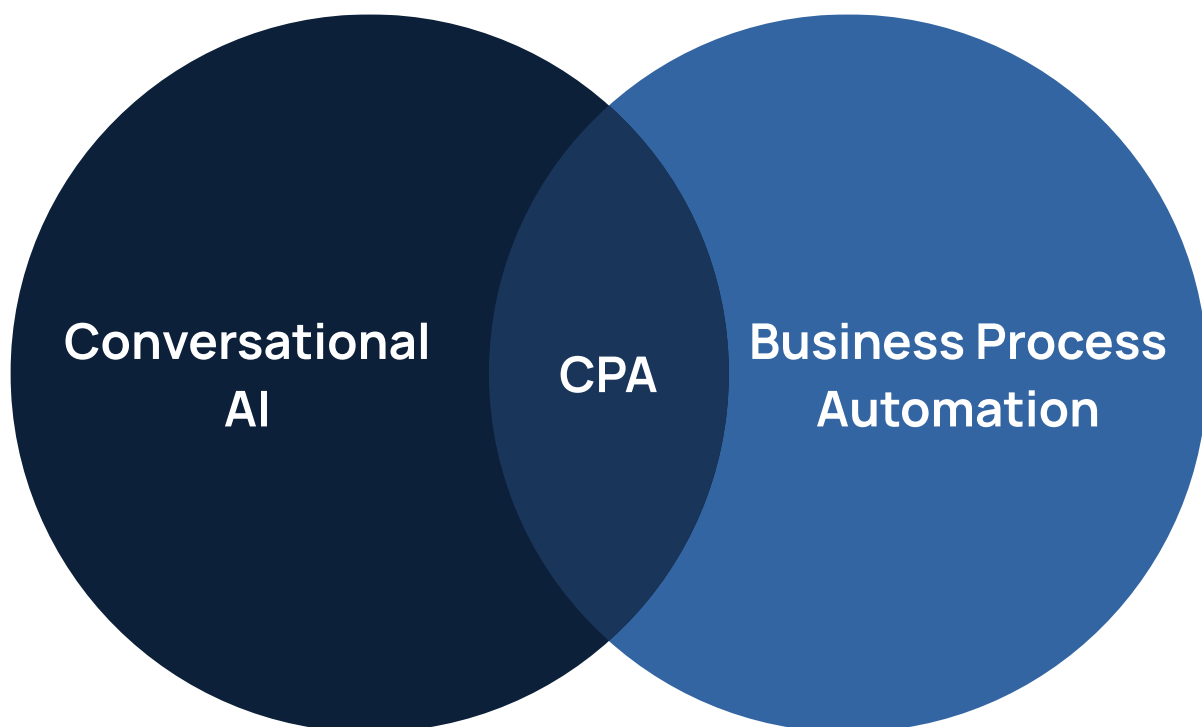
CPA does this by architecting its conversational logic using structured data rather than decision trees. This enables the conversation flow to adjust dynamically to injected data and varying customer responses, while staying true to procedural rules.

CPA also ensures that every conversation is tracked. This ability to not only offer compliance assurance but deep insights into every conversational journey means that business can continually track and optimize conversational processes at scale.

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The Conversations That CPA Is Best Suited to Automate

Conversational AI is better than CPA for informational responses.

BPM is better suited for form heavy data capture or the provision of comprehensive data responses.

CPA is the best option when looking to automate conversations that vary based on the customer, supplier or staff member's context and responses, yet need to stay true to all business processes, regulations, and system requirements.

These conversations include (but are not limited to):

1. Lead qualification conversations
2. Need analysis (sales) conversations
3. Contract renewal and upgrade conversations
4. Debt restructuring and collection-related conversations
5. Query resolution conversations
6. Dispute handling conversations

How Conversational Process Automation works with Robotic Process Automation

Robotic Process Automation (RPA) refers to a suite of technologies designed to improve business processes through automation. Via digital workers or robots, RPA looks to remove the dependence on human input in the execution of middle and back-office processes.

This includes the reading of scanned forms or emails and the resulting capture of relevant data into relevant systems. It also includes the capture of data collected via conversational processes in the front office.

Given the highlighted limitations of chatbots, webforms and portals, RPA digital workers are forced to rely on humans to complete many of the conversational processes required to gather and structure data for system processing.

As a result, the ability to increase the number of processes that can be automated from front office through to back office is limited by the capacity of staff available to process front office engagements, one customer at a time.

CPA removes this dependency and allows for the automation of conversational processes at scale.

As a result, RPA digital workers can now be handed the trusted, structured data they require to complete the work, without the dependence of a human in the loop. This at high volumes across multiple digital channels, all at once.

What Are the Benefits of CPA?

Improved Business Performance

Through enhanced front-office automation, CPA allows the reduction of operating costs while increasing business productivity. A Virtual Agent never sleeps, and can ensure consistent, compliant, and accurate execution of conversational processes across multiple channels. This means providing a streamlined customer experience while drastically reducing process inefficiencies e.g., waiting for a human to come into the loop.

The Virtual Agent not only reduces unnecessary waiting time or process errors, but it also ensures that relevant systems get passed the correct structured data for straight through processing.

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Lower Operating Costs

When you have automated interactions with customers, suppliers and staff through CPA, operating costs automatically reduce. The notion of time spent over the phone is not relevant as the digital channel gets fully utilised. The focus shifts to customer satisfaction and the ability to have impactful conversations with thousands of customers at the same time.

Higher Efficiency

One contact centre agent can only serve a single customer at a time, given the two-way dialogue that needs to occur in line with business rules. This pace cannot be compromised given the impact on the engagement experience i.e., customers don't want to feel pressurized or rushed.

In contrast, a Virtual Agent can have consistent, compliant, and hyper-personalised conversations with thousands of customers at a time, without any waiting time. Plus, the Virtual Agent can work with a team of RPA digital workers to process all the back-office work required to deliver a one touch customer engagement experience.

In addition, a CPA-powered Virtual Agent can also handle specific parts of the end-to-end process, while other parts get managed by the human agent or RPA digital worker. This allows for improved efficiencies and a more effective spread of the work across the full-service team (human agent, CPA virtual agent and RPA digital worker).

Higher Customer Satisfaction & Retention

No one likes to wait on the phone for an available human agent to answer or to be forced to fill out a series of clunky and non- responsive forms that don't make sense or don't fully apply to their situation.

CPA improves customer experience by adding a "voice" to these process-heavy business interactions. This enables a better connection with customers, suppliers, and staff through a more tailored, user-friendly engagement experience.

Virtual Agents can also be designed to offer people context-relevant advice that streamlines their decision-making and improves the process efficiency and effectiveness.

When a person senses that a brand/ company/ organization is dedicated to listening to their queries, clearing their doubts, offering meaningful advice, and getting things done quickly and easily, their sense of loyalty rises and with it their spend.

Continuous Improvement

CPA is a dynamic automated solution designed to execute customer-facing business processes, detect process weaknesses, and optimise their performance.

Through a solid data-driven approach, it empowers businesses to systematically analyse Virtual Agent conversations and look for ways to optimize underlying processes. In other words, CPA provides a continuous evidence-based improvement loop with the chance to quickly adapt the conversational experience to customers' demands and expectations.

This means that whilst executing the conversational process, all the data gathered from Virtual Agents is structured and wrapped into meaningful insights. Such insights allow companies to gain better knowledge of their customers and the performance of the processes they are subject to, and ultimately improve both.

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Lower Maintenance

Whenever it comes to updating process rules and variables in traditional process mapping systems such as web forms or web pages, time is one of the main challenges. Not only does it impact the coding team, but the time to production normally takes longer than the business can afford.

CPA changes the rules of the game by moving from a static and rigid logic system to a dynamic one. After providing meaningful insights, CPA allows businesses to update the conversational process logic quickly and easily. This brings agility to the customer-facing space and ensures an optimal customer engagement experience can be maintained across channels at scale.

365-24/7 Availability

A CPA-powered Virtual Agent solution doesn't need coffee or toilet breaks or 8-hours of sleep. They can engage via any digital channel, as and when a customer, supplier or employee wishes to have a conversation.

And as user volumes, locations and demographics change, the Virtual Agent can continue to meet their demand without the pain of hiring and training up new contact centre agents across the globe.

Improved Experience

Many companies operate in complicated, regulated industries where the average customer struggles to understand their products and rules. A key limitation of webforms is the inability to communicate with the end-user as an agent does. Trying to create a conversation using a webform is simply impossible.

And offering a customer a chatbot that has access to the same generic web content is not helpful either. As a result, these conversations end up in the contact centre, either via live chat or phone.

Given the variation in conversational volumes, making sure every customer, supplier or employee can access a knowledgeable human agent as and when they require it; someone who can resolve their request, query, issue, or complaint in line with process and system rules, is not easy.

Without CPA

With CPA

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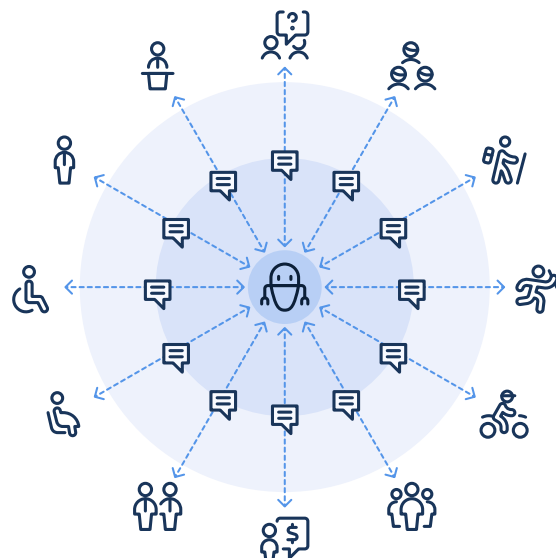
Often demand exceeds supply, and people must wait in the queue before being served.

With a Virtual Agent, conversational volumes can surge without a person having to wait for their query to be answered, real time.

Using CPA-powered Virtual Agents, businesses can enable two-way communication at scale. Within a single conversational engagement, needs can be clarified, root causes can be diagnosed, jargon can be explained in context and required actions can be triggered.

As a result, people with limited understanding or knowledge can be self-serve successfully.

Tailored Experiences

When powered by CPA, Virtual Agents allow personalised engagements with customers, suppliers, and staff. No more one-size-fits-all interactions. Thanks to its flexible logic system, CPA ensures a tailored conversational experience that shapes to each customer's needs and context, while staying true to the underlying process rules and requirements.

A Wider Range of Conversations Can Be Automated

While Conversational AI-powered chatbots can automate simple processes and Q&A responses, many conversational processes still need to be handled by human agents.

BPM has the ability of automating more conversational processes that particularly relate to requests and queries resolved through a screen-by-screen, form-by-form flow.

Again, while helpful, the processes that are more contextual and require a greater level of advisory support still need to be handed over to a human agent. CPA has the capability of automating a far wider range of conversations, from simple to complex, where customer, supplier or staff knowledge and experience varies.

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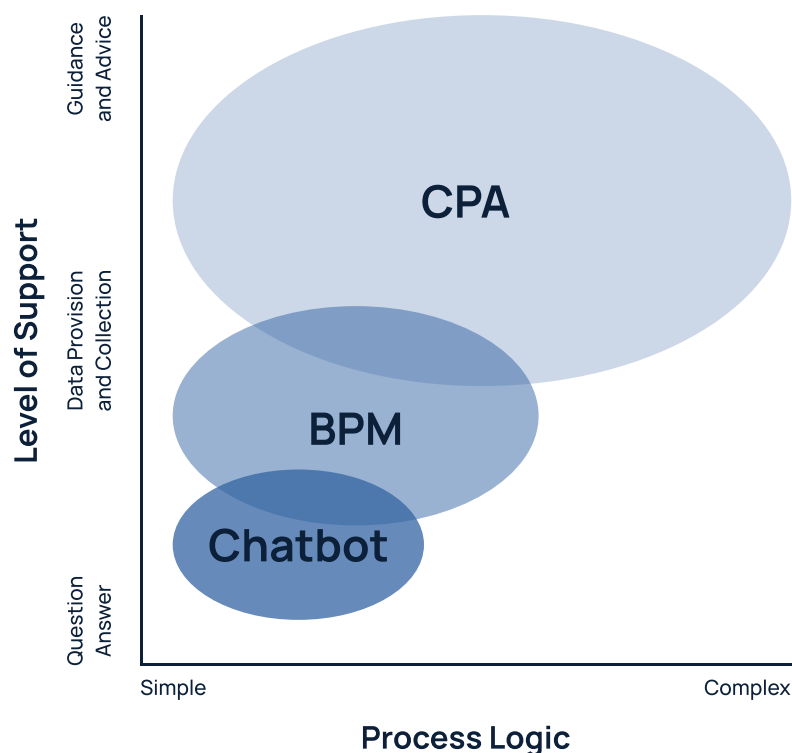
In Summary

CPA fills the gap between Conversational AI and BPM. It marries the conversational engagement experience with the process rigidity and constraints. And it does it in a way that ensures consistency, compliance and relevance to each customer and context.

As a result, companies using CPA can now automate a wider range of customer, supplier, and staff conversations straight through. This has significant cost saving implications, while improving the total customer, supplier, and staff experience.

By automating more task-focused conversations, human agents can focus more time and effort on relationship-focused conversations.

By reducing the cost of task-based conversations, and improving the effectiveness of relationship-based conversations, companies can deliver more to the customers at a lower cost.

About CLEVVA

CLEVVA specialises in building, deploying and managing Virtual Agents. These Virtual Agents engage directly with customers, suppliers and employees via multiple digital self-service channels.

They automate the conversations required for effective lead qualification, renewals and upgrades, collections, query and dispute resolution, and information gathering.

Virtual Agents improve digital sales, support and service at a significantly reduced cost while freeing up human agents to focus on higher value, lower volume customer engagements.

For more information on CLEVVA Virtual Agents and how they can transform your customer's digital experience, visit www.clevva.com.

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