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Introduction

Effective customer service is not only about managing phone calls but managing *processes*. Effective business process management for customer service relies on achieving a clear visibility and understanding of your processes, as well as the ability to rapidly adapt them to changing customer needs and business demands.

A *process orientation* for customer service is necessary to make sure that you are managing your service processes efficiently and aligning them with your business strategy and goals. These best practices help you establish a clear strategy to ensure that customer satisfaction is maintained while business goals are realized:

- Defining your processes
- Empowering business managers
- Facilitating business and IT collaboration
- Empowering knowledge workers
- Knowing your metrics
- Choosing technology that supports agility
- Establishing a center of excellence

Defining Your Processes

Many organizations haven’t defined critical processes clearly—let alone enforced them. Ask various people in a company if they know how, for example, the ordering process works and you’re likely to get a different explanation of the same process from different people. While process stakeholders may have some understanding of the process that falls under their functional area, anything outside it is a black box. And there is little, if any, clarity about processes that span multiple functional areas, such as customer service, billing, shipping, etc.

Some organizations have made the effort to describe their processes in standard operating procedure (SOP) documents and Visio diagrams. While that’s far better than having no documentation, this rarely suffices to describe the actual processes running in the company. Business processes change but, typically, documentation doesn’t and it quickly becomes outdated. The ideal, to “document what you do and do what you document,” is hard to enforce using paper-based management systems.
This highlights the need for what is known as *model-driven architecture*. Model-driven architecture enables organizations to use business-friendly tools to document their business processes. In addition, the processes that are designed or envisioned by business managers are those that are actually running. When changes are made, the design description and runtime is changed simultaneously so that you always “do what you document.”

A clear understanding of end-to-end processes and the ability to keep documentation current is a necessity for consistent process, and hence, consistent customer service.

Process-modeling tools, such as the KANA Visual Experience Designer, allow service managers to define processes easily and ensure that their design is true to what is running. End-to-end definition of process is possible, no matter how many functional or system boundaries are crossed. If there’s a question about a specific process, say, dispute resolution, you can use this online tool to pull up a visual process-flow diagram for an immediate answer. With clear descriptions of human and system activities—who does what at which step, what rules and policies apply to escalation, etc.—this tool keeps every stakeholder in the know.

End-to-end visibility and understanding of the service process—what it takes to solve a customer issue from start to end—helps break down functional and system silos. Your process in execution needs to be the exact process designed by the business manager. Using tools that allow you to quickly describe your operations across functional and system boundaries and share the information helps to make that possible.

**Empowering Business Managers**

The people who know most about customer service processes are the people closest to it—your service and operations managers. Managing or running the service operation—they are the process owners. They must have a clear understanding of processes, since they are responsible for the outcome and oftentimes determine operational policy and procedure.

As the key stakeholders in the customer service process, these managers need to be able to easily design processes and implement changes to them to ensure efficient and effective customer service experiences. They need business-friendly tools that help them design experience flows—the flow of information agents and customers are presented with during a service interaction. Despite common practice, Visio and PowerPoint are not those tools. They may be easy to use but the processes designed aren't easily converted into running executable applications. To implement process, the design has to be translated by IT—it takes a lot of code to make it happen and often much is lost in translation.

Effective customer service depends on the ability to put the business manager’s design into operation, to monitor performance and make rapid changes to the service experience. Processes need to be designed using tools that enable the rapid conversion of design into application.
Business-friendly tools are needed to enable service managers to design and orchestrate processes across technologies, and to monitor and adapt them to business developments.

**Facilitating Business and IT Collaboration**

In the absence of model-driven process design, the implementation of, for example, a refund process is a lengthy, labor-intensive undertaking. A senior executive will ask IT to create something, such as a refund application, and IT will gather the requirements. It takes business managers weeks, if not months, to put together the kind of application requirement document IT needs to get started. Typically, requirement documents consist of hundreds of pages defining process, stakeholders, business rules, policies, etc. IT receives the document and can begin coding the application. Coding often takes several months, and the result is a prototype that often doesn't live up to what business managers actually need. Moreover, in the six months it takes to get to this point, the requirements will often have changed due to business developments, new service offerings or changes in government regulations.

Now, IT has to start from scratch or the project gets scrapped. If the latter happens, business will look to an off-the-shelf product, but these types of products commonly meet just 30 percent of users' needs.

A different type of collaboration is needed—one that enables business to design processes quickly and allows IT to implement the actual design and integrate with other systems. Visual design tools for process design make this possible by putting business and IT on the same page—literally. All versions of the process model can thus be made available to business and IT for review. Work can be done collaboratively and efficiently.

A graphical user interface for process design bridges the communication gap between business and IT regarding application requirements. IT is not burdened with creating thousands of lines of code before it can be determined whether an application will actually meet business needs. Programmers can easily integrate processes with other systems and avoid the unnecessary replication of data. IT can focus on architecture, performance and other needs that make the process application successful in the enterprise environment.
Make it easy for business and IT to work together by clearly defining process owners and employing visual design tools that facilitate collaborative design and enable the fast conversion of design into executable applications.

**Empowering Knowledge Workers**

Customer service agents are the people interacting directly with your customers. They play a key role in the quality of your customer experience. Many services traditionally handled by the contact center are now being handled by customers through self-service functionalities on the company website or in online communities. As a result, only the most complex cases typically reach agents. The agent’s role has evolved into that of a specialist or knowledge worker. Customers expect agents to have an in-depth knowledge of their specific problem—certainly more than what’s available in the self-help section of the company’s website—but many companies have hundreds of products and complex services. It’s a demanding job.

Your agents’ ability to do their job well affects customer satisfaction, revenue generation, process efficiency (and hence cost)—essentially how effective your service is. If agents are struggling to find answers, customers will get impatient, further frustrating agents and sending call quality down the drain. The result: increasing agent dissatisfaction and high agent turnover.
To do their job well, agents need fast and convenient access to relevant information, which means that your agents’ actual work processes must be integrated with the knowledge base. Integrating the contact center solution or the agent desktop with the knowledge base eliminates the need to review step-action documents, memorize complex procedures and search through guides to help customers when memory fails. An integrated knowledge management system provides agents with the right information in the context of the call.

Another common problem agents face is the need to navigate dozens of applications to find answers and perform transactions. Applications previously installed to solve specific problems tend to accumulate. To fulfill their job, agents have to alt-tab between these many applications during calls—further complicating their task. As with the knowledge base, service applications need to be integrated with agent work processes. Integration can't be equated with a “single sign-on” system or even a “mash up.” A process-based solution integrates applications with service processes so that the process itself determines which systems are accessed during a service interaction.

A process-based solution orchestrates tasks and information across various systems and knowledge bases, providing agents with the right knowledge in context of the process step. Agents do not have to switch between applications or search for solutions. As service interactions unfold, the needed information and choices are presented to agents in the user interface—an adaptive desktop—so that agents can do their job more efficiently.
To make the customer experience effective, agents need to be able to do their job efficiently. By integrating knowledge bases and system applications with the agent work process, agents can access the right information promptly and focus on the customer rather than the process.

**Orchestrate**

Agents provide service via Web portal

Keeping customers happy and service cost-efficient is a tough balancing act for business managers. An important first step to achieving equilibrium is to define which customer service metrics are important to your business—customer satisfaction, NPS, FCR, revenue, cost etc. Key questions you should be asking include: Which processes impact which metrics? Do your contact center systems allow you to monitor your key metrics? As pointed out by Norton-Kaplan, you cannot improve what you do not measure and you cannot measure what you do not define.

**Knowing Your Metrics**
Once you know which metrics are important to your business, try to list the processes that impact them. You’ll find that none of the processes or metrics in a company move in isolation—each process can impact several metrics in different ways, and metrics are often interdependent. Customer satisfaction may have an impact on cost. Changing a refund service-level agreement (SLA) may have an impact on customer satisfaction and so forth. That makes it critical to perform this impact analysis before setting targets and objectives for key performance indicators or metrics.

Improving your business means improving your business processes. This, in turn, means understanding and monitoring key business metrics and getting insights from them to adjust or improve processes.

**Choosing Technology That Supports Agility**

The competitive and regulatory environment that service organizations operate in is changing faster than ever. Adapting business processes to accommodate those developments demands agility. But the reality for many businesses is that it takes months to make the kinds of changes needed.

Efficient and effective service depends on the ability to implement process change in weeks, if not hours. To make that possible, processes and IT systems have to be architected to support agility. A well-defined service-oriented architecture for applications, defined integration strategy and model-driven process approach ensures that you can change service processes quickly—whether you are changing policies, SLAs or escalations. With agility, you can do more than respond to changes in the market. You can exploit opportunities before your competition does.
You can launch new products and offers quickly, rapidly impart knowledge to agents and have new processes up and running with minimal disruption to IT.

Service processes must undergo regular adjustment to stay relevant to customers and fulfill business requirements. Plan your process and technology strategy with agility in mind to pave the way for frequent and rapid change.

**Establishing a Center of Excellence**

Customer service process deployment is not a one-time event. To stay ahead of the competition, you need to make sure your processes are up to date and stay that way. Establishing a center of excellence (COE) focused on the methodologies and governance around process design, change management, continuous improvement of service metrics, and SOA governance will help achieve that.

A center of excellence establishes how the processes should be designed, what the re-usable components are (data, sub-processes, services, user interfaces, integration adapters, etc.) and which repeatable process patterns can be used. Set up a version control mechanism for your process models and define a review process to assess and approve changes. Keep all stakeholders up to date on the latest process designs and solicit their input for further improvements.
Define how to request changes to the process, and how to implement and deploy approved changes. Importantly, that includes how to upgrade to new versions of processes, what happens to processes initiated in earlier versions, etc. An effective COE will document how to train employees in process design and process execution. It’s key to define the roles of all process stakeholders, such as business analysts, process owners, line-of-business IT, enterprise IT and others. With clarity surrounding roles and responsibilities, process design and development can progress smoothly.

Establishing a COE takes a lot of thought, and careful evaluation of your technologies and organizational culture. But a well-designed COE will determine the success of your process management and continuous improvement initiative.

A COE helps make sure that the process applications you design don’t just become new “legacy” systems in need of replacement two years down the line. A COE is where the proper documentation, version control, access control and audit history is maintained for all processes. It defines the “process” in process management.

**Conclusion**

Having a process-oriented view of your customer service operations helps you design better customer experiences. With model-driven architecture, the task of creating process applications no longer needs to reside solely with IT. Business and IT can now collaborate on designing service processes and deploying applications that address customer and organizational needs. By designing processes that anticipate the need for frequent change, your customer service operations can respond to a constantly changing business environment.

Clearly defining service processes enables you to monitor, analyze and improve them. However, your process design won’t succeed in the long term unless you create governance around it. It is crucial that you determine process improvement periods and allow for quick, unplanned changes to process applications. Define ownership, choose a methodology for design and for change management procedures and enforce them—so that you can deliver effective customer experiences and run your service operations efficiently.
About KANA®, A Verint® Company

KANA®, A Verint® Company, is a leading provider of cloud and on-premises customer service solutions. KANA helps global organizations—including many of the Fortune 500, mid-market businesses and public sector agencies—optimize their engagements with consistent and contextual customer journeys across agent, web, social and mobile experiences. Using KANA solutions, organizations can reduce operational costs, increase resolution rates and improve brand loyalty. Learn more at www.kana.com