

## View Point



### Unified View of Customer and Performance Reports in Contact Centers

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Contact center agents accessing customer data scattered across multiple applications are challenged to derive useful and timely information for better customer interaction. Coupled with the growing complexity of contact center operations, the need of the hour is a 'Unified View' of customer profile and performance reports.

In this paper, we discuss the advantages of having a unified view of customer profile and performance reports, and present a few approaches to build 'Unified Views'. A unified view empowers not just the agents, but also the supervisors and senior management for better management of contact centers.

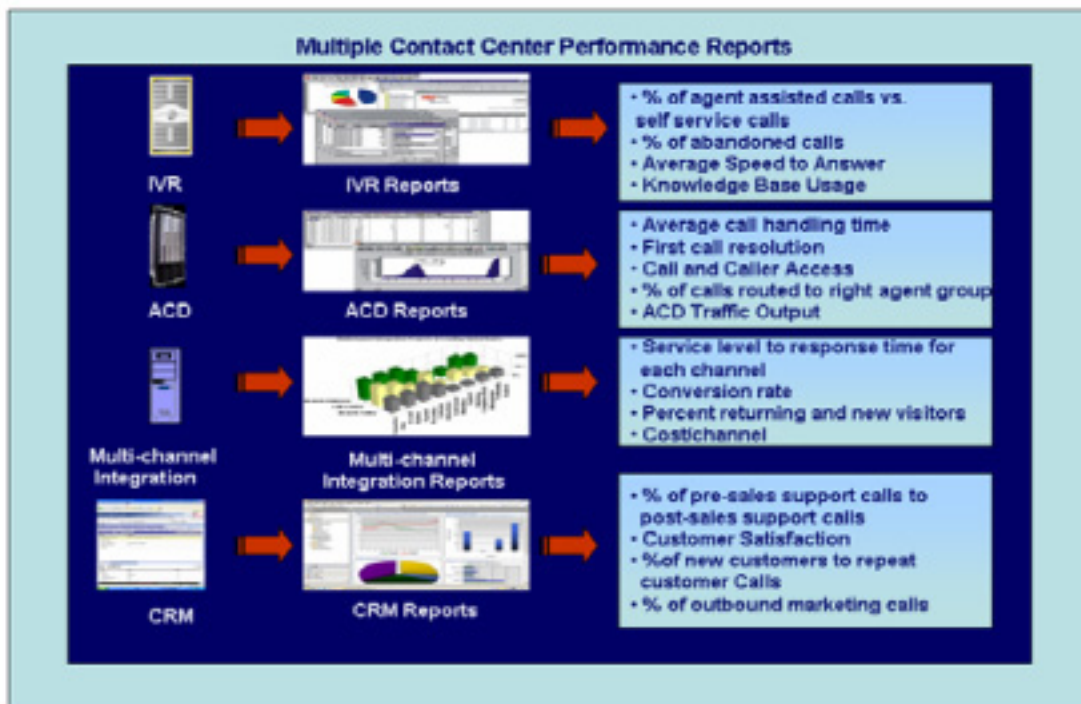
## Limitations of Multiple Views of Customers and Performance Reports in Contact Centers

**Limitations of Multiple Views of Customers:** Contact center agents generally access information from different applications like IVRS, CRM, Billing, Service Provisioning which have their own individual customer databases, along with separate client applications to support the customers. This creates practical concerns of:

- Increased time and complexity in servicing customers due to the need to switch between multiple client application instances
- Same customer information being keyed into multiple applications
- More call handling time and delayed response to customer queries, affecting overall customer satisfaction levels

Forrester, in its research report “Twenty-Three Best Practices for the Customer Service Center”, October 2005 stated, “Contact center managers report that agents routinely access more than 20 separate desktop applications to perform common tasks and account look-ups when servicing customers. Consolidating agent desktop applications will not only increase agent productivity, but also will decrease errors involved in moving data from screen to screen.”

**Limitations of Multiple Performance Reports:** Though the reports received from different contact center modules like ACD, IVRS, CRM, and Channel Integration are packed with micro-level information, it is usually strenuous to derive from them the macro-level information needed to assess the overall contact center performance, in terms of the customer satisfaction level. The drawbacks of working with multiple reports are:



- Lot of time and effort spent to collect and maintain multiple reports
- No comprehensive information on performance
- Delay in getting vital statistics
- Difficulty in deriving interrelated reports
- Mammoth effort to spawn a cohesive report

### What does a 'Unified View' of Customer Profile and Performance Reports mean?

'Unified View' refers to the amalgamated representation of information for the benefit of the agents and supervisors of service organizations like a Contact Center.

**Unified View of Customer Profile:** It is a master customer information repository that provides macro-level customer information and can be accessed through a single view, anywhere, anytime, irrespective of the category of customer service request (e.g. product or service preferences) and the contact center technology applications/systems (e.g. CRM, Billing, Service Provisioning).

**Unified Performance Reports:** They are auto-generated reports that give the summary of a contact center's performance, be it with reference to different traffic information across different channels of access (e.g. Voice, E-Mail, Web, Chat) or customer service levels across different applications (e.g. On-line, IVRS, CRM).

## Advantages of an Unified View of Customer Profile and Performance Reports

A single view of a customer's profile offers contact centers the benefits of:

- Unified customer experience across all contact channels
- User-friendly information access to agents and supervisors
- Increased agent productivity due to lesser time spent on call handling and administration
- Faster customer service response time enabled by a 360° view of customers
- Better planning of marketing strategies and campaigns, and more accurate evaluation of the financial impact of customer relationships
- Better equipping agents for cross selling and up selling
- Meaningful personalization of products and services to increase customer satisfaction

A consolidated view of contact center performance reports offers the following benefits of:

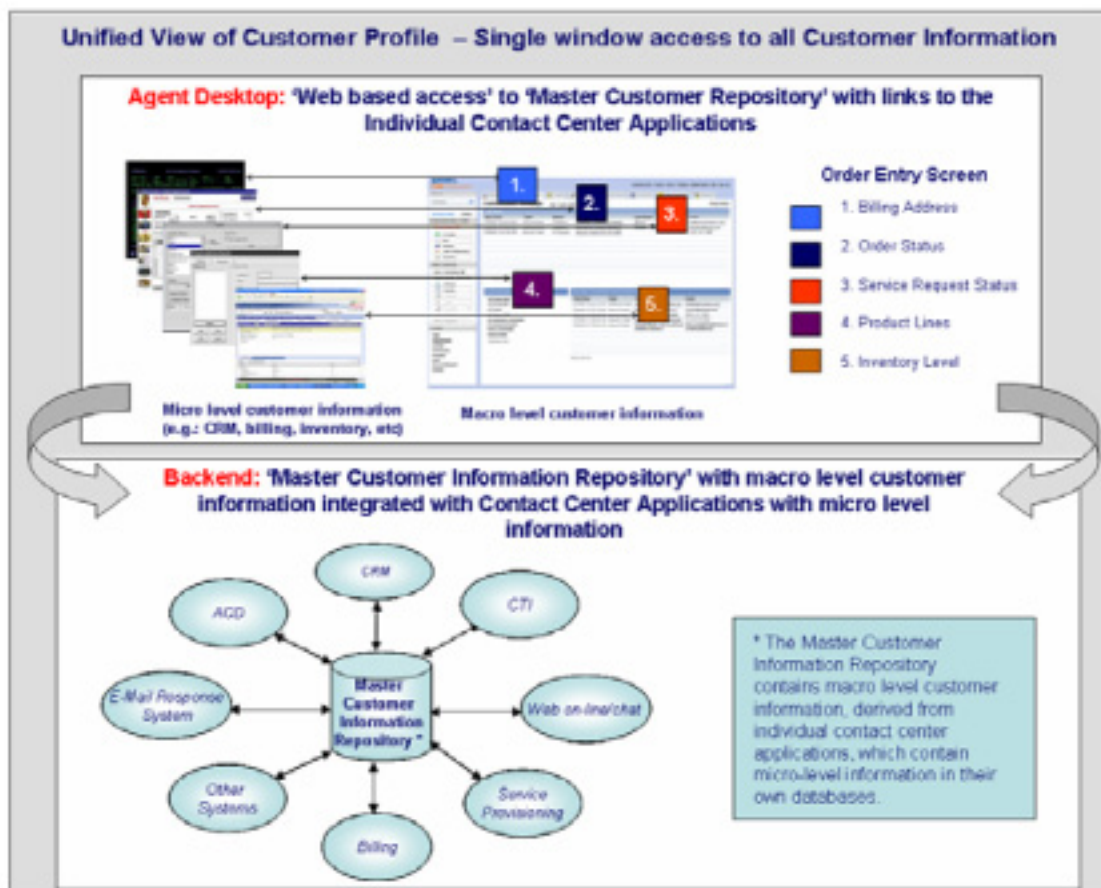
- Cost reduction through time conservation, as the need for manual consolidation of reports is eliminated
- Increased efficiency through instant access to comprehensive reports
- Comprehensive information for overall performance evaluation
- Mitigation and implementation of risk management is facilitated by instant reports that lead to early alerts/quick backups
- Better pain point/bottleneck analysis leads to improved business processes and better strategic planning for expansion/improvements

## Approaches to build a 'Unified View'

Here are some viable means to build a 'Unified View'.

### Building the 'Unified Customer Profile'

A simple and straight forward approach is to have a 'Master Customer Information Repository' with consolidated macro-level customer information stored in it. This repository can have pointers or links to the various contact center applications and systems to access micro-level information as and when required. The system design can be such that the macro-level information entered in the master customer repository need not be re-entered in all the individual call center applications. This approach helps to avoid data redundancy, apart from saving time and effort.

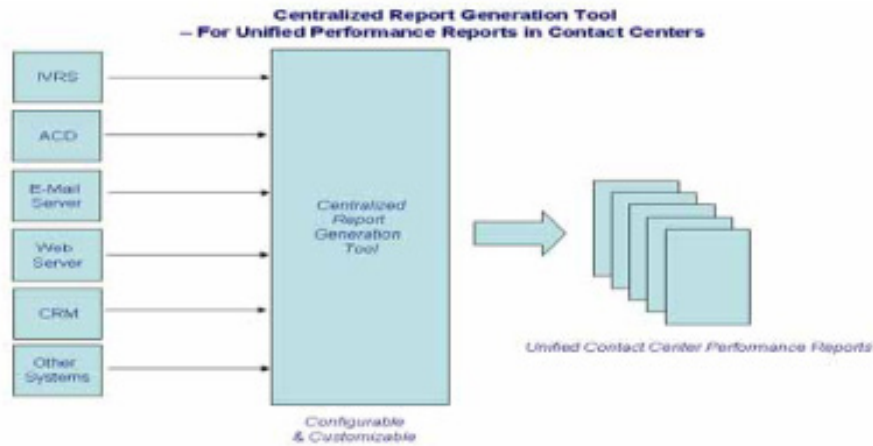


The 'Master Customer Information Repository' can be supported with 'web access' to enable access to customer information from anywhere, anytime and any location, by employees, partners and customers. This way, an agent uses the Master Customer Information Repository with web access when a customer needs basic support services, and for advanced support services, the agent accesses individual contact center applications. This approach helps the contact center agent to serve the customer quickly.

In case of green field contact center implementations, this solution can be pre-planned and implemented easily. But in case of an existing implementation with multiple applications/databases, the existing system must be carefully studied to plan for a smooth migration to a 'Master Customer Information Repository' with 'web access' set-up.

### Building the 'Unified Performance Reports'

An alternative approach to deal with individual performance reports from numerous Contact Center Modules like ACD, IVRS, CRM, E-Mail Server, Web Server, and Chat Server, is a Centralized Report Generation tool or application, which collects raw data on performance from the different modules, processes it and generates a 'Unified Performance Report' to present the essential statistics representing the overall performance of a contact center.



This Centralized Report Generation Tool can be configured to generate customized reports from the raw data obtained from different systems. In addition to delivering all the benefits of unified performance reports mentioned earlier, the administrators and senior management of contact centers will find these reports convenient and versatile.

## Conclusion

Today, contact centers are facing growing complexity in handling multiple customer databases across different applications and multiple performance reports. Deriving useful and timely information from them and improving customer service support remain great challenges. Handling of multiple customer data bases and performance reports reduces the employee productivity and overall efficiency of contact centers. Having a unified view of customer profile and performance reports will augment the overall customer experience and will help to build customer loyalty.

### About the Authors

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