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Analytics: The Cornerstone for Sustaining Great Customer Support

ORACLE

Executive Overview

Without effective analytics, it is virtually impossible to truly understand, let alone improve, the experiences customers have with your organization. This white paper offers an in-depth look at the strategic importance of analytics, reveals why many organizations have thus far failed to truly exploit the potential of analytics, and describes some of the critical requirements of effective analytics implementations.

Introduction

Web self-service and contact center solutions powered by knowledge platforms have proven highly effective in helping support organizations improve both the efficiency of their operations and the quality of their customers' experiences. However, in many cases, the initial results achieved by this technology are converted to only short-term benefits. This is because products change, customer challenges change, and business requirements change—and knowledge solutions fail to keep up. Early gains are squandered, and support organizations find themselves back at square one, struggling to deliver the quality and speed of service that customers demand.

The key to delivering sustainable improvements to the customer support experience lies in analytics. Because analytics provide insight into what happens during each customer interaction, you can continuously monitor and improve your Web self-service and call center knowledgebase implementations. However, not all analytics are created equal. Simply putting reporting into place may not provide you with the information you need. To truly understand the root causes of customer complaints and the factors that contribute to deteriorating metrics such as call handle times and first-contact resolution, you need to be able to analyze the customer interaction as a whole. This requires a new breed of analytics that offers in-depth insight into exactly what has taken place during each interaction. It answers such questions as

- Did the customer find what she was looking for?
- Were the results presented targeted enough?
- Was the content accurate and up to date?
- Is something missing?
- Did the interaction result in an escalation?

Without this type of analytics, improving your knowledge implementation and the customer experience that you deliver over the long term is extremely difficult.

Armed with the right analytics, you can sustain the benefits of your knowledge solution. These analytics help you keep up with changing business conditions, focus your resources on high-impact areas, scale your support organization, and implement reward systems that foster a knowledge culture. For example, a major software vendor used the analytics feature in Oracle Knowledge for Web Self Service to determine that just 10 percent of the 80,000 documents in its knowledgebase were used to manage 90 percent of call volume. The company now targets its resources so that it can maintain that vital 10 percent and, as new products and services are introduced and as new customer challenges develop, repeats the exercise to make sure it’s still targeting the right 10 percent.

A Great Knowledge Solution Is Only Half the Battle

Many companies have invested in building knowledge-driven support organizations that can effectively resolve issues in the contact center and help self-service customers quickly find answers on a Website. These knowledge solutions have provided customers and employees with effective tools that allow them to find relevant answers as well as efficiently request and create new knowledge. However, although implementing a searchable knowledgebase usually delivers early benefits, sustaining these benefits over the long term as new products, customer challenges, and business conditions arise has proven far more elusive.

Despite the many years and dollars spent, too often executives at support organizations find themselves back where they started—evaluating and looking for the next knowledge "magic bullet" that will help them more successfully resolve customer inquiries. The fact is that implementing a best-in-class knowledge solution—while absolutely essential—is only half the battle. To build a knowledge culture and provide customer-facing staff and managers with the tools to sustain a knowledge organization is quite another challenge.

Understandably, this issue is bigger than just the technology. It requires change management, incentives management, strategic planning, executive sponsorship, and other factors that can make or break initiatives in large organizations. However, from a technology standpoint, what is lacking is a brand of analytics that is tied into the knowledge solution so that customer support executives can "guide the ship" with insight into ever-changing customer behaviors and knowledge needs. Oracle's position is that a lack of analytics is the #1 technology reason that support organizations fail to see longer-term benefits from their knowledge solutions, forcing them to reinvent their implementation every few years with new vendors, applications, and strategies.

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Further, many of the nontechnology factors important to long-term success, such as change management and successful incentives, rely on good information and analysis so that they can be effectively implemented. For example, rewarding contact center agents based on their ability to contribute high-value content that can be reused by their peers is good in theory but impossible to implement if the value of new knowledge and its frequency of reuse are not understood. To consider another example, if a reputation system cannot be tracked and analyzed, the ability to monitor the contributions and activity of individual employees over time is impaired.

The Need to Prioritize Analytics

The use of analytics has been well understood in other segments of corporations. Marketing organizations, for example, fully embraced analytics once these groups discovered the power behind understanding customer behavior. Using analytics, marketing organizations have learned to precisely target campaigns, offers, prices, products, and bundles—resulting in significant increases in offer uptake, sales, and retention.

In customer support organizations, however, adoption has been slower for several reasons. First, the benefits of going live with a knowledge solution can be so immediate that organizational leaders assume that these benefits will continue indefinitely over the long term. Consequently, the use of analytics tends to be overlooked and is often the last technology implemented. Second, analytics implementation has a bad reputation because of a history of failed projects. Data warehousing, the primary analytics engine, has not met business expectations. It can take a long time to implement and can become out of date before it even goes live. Data warehouses are rigid and inflexible, making it hard to change predefined reports; as a result, they end up full of bad or inconsistent data that business users are loath to trust. These issues have led many organizations—customer support included—to become wary of engaging their IT counterparts in implementing the analytics they need.

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Unfortunately, in the world of customer support, the value of analytics is largely untapped. However, without analytics, you cannot understand how well you are meeting your user's needs, know where and how to change the user's experience, or determine which content is the right content to create and maintain. Analytics are needed to guide your knowledge implementation for multiple reasons—chiefly, they allow your organization to better

- **Understand your customer.** They can help you understand when a self-service customer has a good or bad experience and what is causing the customer to pick up the phone and call the contact center. Knowing why self-service customers fail enables rapid response and adjustment to provide better content and more-effective search results that help to increase call deflection.
- **Understand your content.** Analytics can help you deliver a great customer experience at a lower cost by helping you answer these questions: How much does it cost to publish every answer to every question? How many articles published have never been viewed? Who is authoring the articles that are viewed the most? How about those viewed the least? Answers to these and other questions will help you gain the information to improve your knowledge operation.
- **Understand your people.** Analytics can help you identify your most-frequent and valuable contributors so that you can reward the right people and train all of your staff to match the behavior of your top performers. Or you can determine which team members are best suited for knowledge creation, review, and publishing, as well as which members are best suited for customer interaction. This information encourages rapid development of high-value knowledge by those who best understand what customers need to know.

Not All Analytics are Created Equal

When planning a knowledge solution for your Website or in your contact center, you should keep analytics top of mind as you look for technology that will meet your needs. However, not just any analytics capability will do: the fact of the matter is that there are "good" analytics and "bad" analytics.

The temptation may be to simply apply standard business intelligence (BI) tools, which many companies already own. But these types of analytics packages are generic tools that require extensive customization to understand what a customer interaction is, let alone what is leading to customer behavior such as escalations, transaction abandonment, and long call times. These traditional packages require considerable manipulation to have even a chance of gleaning meaningful information about the user experience. For example, to use a data warehouse to analyze service interactions, IT would have to get click-stream analytics from the Website, keyword search analytics from the search engine, content usage analytics from the content management system, and session analytics from the portal. IT staff must attempt to marry all this data together in a data mart in an effort to understand the overall customer interaction and produce actionable reports. To do so, staff must overcome differences in data structures, taxonomies, hierarchies, terminology, and context across multiple disparate products. While this can be achieved, it is costly, slow, and risky. If even one variable changes, or if IT upgrades a technical component used for the analysis, then all the data manipulation must be reworked. All too often, the business user gives up, or the project gets dropped by IT before it is ever completed.

On the other hand, analytics solutions that are designed specifically to monitor customer interactions—and that address the questions companies should be asking about support activities—can make an immediate impact. These types of analytics solutions provide an in-depth understanding of what happened during an interaction, what the results were, and how well these results satisfied the user's needs. This produces actionable intelligence that enables you to fine-tune all aspects of the user experience, from an initial search or use of a process wizard to the relevance of the results presented, the speed of response, and the accuracy and value of specific content delivered.

The following table summarizes some of the differences between traditional and interaction analytics when it comes to optimizing the user experience and maximizing the value of your knowledge solution over the long term.

TABLE 1. TRADITIONAL VERSUS INTERACTION ANALYTICS

TRADITIONAL ANALYTICS	INTERACTION ANALYTICS	ACTIONABLE DIFFERENCE
Which keywords were most searched?	What was the customer trying to do before picking up the phone?	Understand which parts of the customer lifecycle are leading to complaints, such as the billing phase or the new-product order phase, and target specific areas for improvement.
Which are my most-requested documents?	Which types of questions are going unanswered?	Reduce escalations by identifying content gaps and addressing inadequate or unsatisfactory coverage.
How many new documents were added last quarter?	Which 10% of my information solves 90% of my customer complaints?	Identify and focus on frequently used and valuable content, rather than wasting time creating and refreshing a large number of infrequently used documents.
What is my average case resolution time?	Why are case resolution times for upgrade questions higher than for other issues?	Understand the root cause of problems in order to improve key metrics such as case resolution time and transaction conversions.

The Oracle Solution for Interaction Analytics

Oracle has addressed the needs of support organizations with a comprehensive analytics feature that can help you to fully understand when and where customers and agents engage in useful, productive, and satisfactory conversations. Using the multitude of detailed reports delivered out of the box, you can fine-tune your knowledge solution over time to make sure customers can find what they are looking for; help managers identify the most commonly asked questions; understand where content is useful and where it is missing; and know which agents are collaborating to create, share, and reuse knowledge.

Figure 1. The analytics feature is accessed through a user-friendly and interactive Web interface with drill-down browsing, sorting, and filtering.

Unlike traditional analytics reporting, the analytics feature of Oracle Knowledge for Web Self Service does not put the burden on IT or on the end user to combine Web page click-throughs, content usage reports, and search reports. Instead, the Oracle solution tracks and reports on these activities—not as isolated pieces of data but as part of the overall customer interaction. This enables you to fully understand the complete experience because the results are presented at a level such that a business owner of the support experience can relate to it. The reports span session analysis, user experience, discussion forums, authoring and publishing, as well as customer insight, customer feedback, and system performance. Through an easy-to-use Web interface that supports drill-down browsing, sorting, and filtering, you can interact with the data at a detailed level.

Ultimately, the value of the analytics feature is that it provides you with tools that can help you meet the business goals you have established for your knowledge solution and sustain the benefits for many years to come. The following table provides some examples of the reports Oracle provides and how they can help you meet these business needs.

TABLE 2. REPORTS GENERATED BY THE ANALYTICS FEATURE IN ORACLE KNOWLEDGE FOR WEB SELF SERVICE

BUSINESS FUNCTION	ANALYTICS FEATURE	SAMPLE REPORT TYPES
Improving the user experience	Reports that help you improve the effectiveness of the search experience and the quality and relevance of content	• Levels of usage reports identify when searches are producing results that lead to successful resolution. • Click-through rate analysis provides the average number of questions asked before the user clicks on an answer. • Problem session reports determine where and why users have failed to find a satisfactory resolution. • Relevancy reports identify questions that resulted in no answers or answers with a low level of relevance. • User feedback reports correlate user comments with activities, such as search questions. • Intent coverage reports capture and understand the need (context) of an inquiry as well as what the customer is asking about (content) to determine whether the intents established are producing relevant and accurate results.
Optimizing resources	Reports that provide details about the frequency of content usage, enabling you to target your resources to develop the content that is most needed and useful	• Top issues reports identify the solution documents that are most frequently accessed. • Top question reports reveal the most frequently asked search questions. • Common interactions by concept reports quantify the number of searches for a particular concept, such as a product. • Question cluster reports group questions statistically to illustrate the most-frequent question topics.
Fostering collaboration	Reports that identify who is using and creating knowledge (and how often that knowledge is used), helping you improve incentive programs and encourage knowledge creation, sharing, and reuse	• User participation reports detail the usage by user or user segment for a given period of time. • Most frequently used content identifies those authors contributing the most-accessed content. • Content publishing reports show the amount of content any given user publishes in a month that has been designated as useful in solving customer problems.

Conclusion

Did your customer find a relevant answer? Is the content accurate and complete? Why are calls for this product support question taking so long? Who is consistently contributing the most-useful content? Which diagnostic wizards are working, and which are not?

Without the ability to answer these types of questions, optimizing the customer experience and maximizing the value of your investment in your Web self-service and contact center knowledge solution become nearly impossible. This is why analytics are central to any such implementation. By empowering your support organization to fully understand the when, where, and why of good and bad customer interactions, you can continuously improve your knowledge solution to deliver outstanding customer experiences across the Web, contact center, and social channels; increase the productivity of your support staff; and substantially lower your overall support costs.

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