Lower Costs and Boost Customer Loyalty by Injecting Knowledge into CRM

The Pressure to Slash Costs While Boosting Customer Loyalty

Across industries, those responsible for customer support are charged with lowering costs and improving customer loyalty. But often these goals are seen as diametrically opposed. Whether it’s delivered via a traditional call center, the Web, e-mail, a mobile device, or in person, customer service is now recognized as a differentiator that can provide significant competitive advantage to companies that excel at it. However, the challenges of customer service and support are only getting more complex and more demanding. The key is to tap into all the knowledge captured throughout the organization — often managed separately from a CRM system — to deliver transformative customer service.

This paper provides an overview of business analytics, offers guidance on how to set up your organization for success, and outlines what to seek in a solution.

1 2011 Global Contact Centre Benchmarking study
Market leaders such as Apple, eBay, and Google have set high expectations when it comes to responsiveness to customers and Web self-service offerings. Organizations that can’t keep pace — regardless of industry — will lag behind in their marketplaces.

To stay competitive and build brand loyalty, organizations need to deliver an outstanding customer support experience, providing customers with what they need, when they need it. In fact, the customer’s experience during service interactions can substantially affect satisfaction and loyalty. For example, 87 percent of respondents to a Purdue University survey² said that good customer service influenced their decision to do business with a company again.

The need for stellar customer support is even more pronounced as industry consolidation and acquisitions lead to swelling customer bases for many survivors of the current economic downturn. The result is a heightened need for more efficient customer support. Yet, on top of serving a larger customer base, companies find themselves supporting more complex products and broader product portfolios. In such environments, the challenges of quickly and efficiently resolving customer issues multiply.

A crucial factor in delivering a high-quality experience is a company’s ability to offer customers and employees efficient ways to find and use information. And with failed attempts at self-service driving customers back to the phone and call center, the pressure is on to enable this capability as soon as possible. The problem is that many organizations handle knowledge management and CRM separately.

**Drawbacks of Siloed Knowledge and CRM**

While companies maintain large amounts of information relevant to customers’ interests, too often this information is hard to find. Consider that agents spend most of their time on the phone engaging in research, discovery, and communication of their search results to the customer.

![Figure 1. The majority of the time agents spend on the phone (80 percent) is associated with research and discovery.³](image)

³ J. Ragsdale, TSIA member benchmark report, 2010
Agents typically must find answers to service issues hidden in a multitude of sources, including product manuals, marketing collateral, corporate policies, bug databases, and case notes. Basic search methodologies — such as hierarchical and Google-style keyword searches — are ineffective in the support environment where the customer is waiting for an answer. After all, such searches typically produce lengthy and off-target results lists that require considerable time, effort, and expertise on the user’s part to discover the most relevant answer.

Moreover, most questions can be asked in a multitude of ways — for example, “upgrade service,” “how do I upgrade,” “what are my upgrade options,” and so on. But traditional search and content management engines interpret each word in these questions separately, bringing back hundreds, if not thousands, of irrelevant results.

Requiring agents to sift through multiple applications and thousands of irrelevant and outdated documents wastes time and leads to an expensive support call as well as frustrated customers. Moreover, the need to be trained on multiple systems adds to the complexity and learning curve for agents. In an Accenture consumer study, respondents said the single most frustrating aspect of customer service is agents who do not have answers to their questions. The survey listed the top concern as inability to find a resolution on first contact, followed by the ability to discuss the issue with the agent and the time to resolution. Customers experience many of these same frustrations when they turn to customer self-service applications online, as they face the same struggles as agents in quickly finding the right information.

**Surpass Customer Expectations with Knowledge-Infused CRM**

Quickly finding and delivering the most relevant knowledge for a specific inquiry is the key to delivering outstanding customer service. By injecting knowledge into the CRM process, organizations can lower costs while managing the same workload or an even greater workload with the same number of resources — all while addressing their customers’ needs.

Knowledge management provides efficient ways of locating particular nuggets of knowledge so that employees and customers at all skill levels can rapidly find answers that are most directly related to the issue at hand. Integration between CRM and knowledge management products accelerates response times so that service organizations can boost service levels, shorten call time, and deliver the quality of service that customers demand.

The following are a sampling of ways that knowledge-infused CRM can help organizations lower costs while delivering a level of customer service that builds loyalty.

**Intelligent search can utilize static data to narrow down relevant content.**

Knowledge management solutions help users quickly pinpoint the most relevant knowledge. Rather than expecting the user to know exactly where to look for an answer, knowledge management provides automated and intelligent assistance throughout the search process. By managing for discoverability, knowledge management enables snippets of knowledge to be aligned to the specific inquiry and helps the user recognize the knowledge as relevant.

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When search is not enough, knowledge management solutions can pose dynamic lines of questions (LOQs) or present process wizards that guide the user through a series of questions or automatically present choices that help target the search. For example, a self-service customer who enters the broad search term fees can use an LOQ to narrow down the potential answers. Is the customer interested in fees for checking accounts, savings accounts, or IRAs? Is the customer referring to monthly fees, late fees, or overdraft fees? By supporting the customer during the interaction with these refining questions, you increase the likelihood that the results presented will be directly related to the question.

**Natural language search understands the intent of a question.**

Sophisticated knowledge management solutions use natural language search to understand the nature of a question and return a relevant answer. Advanced search techniques such as natural language processing can take into account different languages and concepts like product names and industry-specific terminology. For example, it can consider the difference between the meaning of “stock” to a brokerage firm and a retail store.

**Search results can include not only the solutions, but also display applets of other content in context with the question or the user static information.**

The most sophisticated knowledge management solutions can understand the intent of a user’s inquiry using analytic trends, business rules, target knowledge sources, and dynamic portlets. These capabilities automatically discover the “true intent” of an inquiry so that the user is directed to the most relevant knowledge source and presented with a personalized display of related options.

These knowledge management solutions allow a user to determine all relevant content — based on the question being asked and the static data from the customer profile — and present more than just the answer to the question. They do this by dynamically linking and associating different pieces of information based on the context of the inquiry. This “directed knowledge” capability is particularly important for online customer interactions where organizations need to be able to anticipate how well a particular piece of knowledge will answer a question submitted via e-mail or researched on the Web.

For example, the troubleshooting knowledge that explains why copies are streaky and how to fix the problem can be accompanied with related knowledge delivered through dynamic portlets. These could include links to other likely troubleshooting procedures, the user manual for the particular copier, a discussion forum of customer tips for getting the best quality copies, in-context FAQs (“Other people who asked your question have also asked these questions”), and even a special offer for a toner that helps to reduce streaking. In essence, the portlet can display anything contextually relevant to the customer and the question being asked. This results in a rich, supportive environment for the online customer and can substantially reduce the number of back-and-forth e-mail interactions as well as prevent website abandonment and costly phone calls.

Or consider someone visiting the Apple website to determine how many computers can be authorized for a single account. The user searches on authorize, which brings back vague results because the search term is vague. However, the searcher is presented with a list of options for filtering the results to a narrower target. Below that, the best results are displayed based on
the site page and the word entered. In this case, on the right-hand side, a portlet appears labeled Product Information. The appropriate terms and conditions would be displayed for review, since authorizing a limited number of computers is in the terms. The site could also display portlets for iPad accessories and user training.

**Solutions have the ability to create, review, and publish content as well as provide permission-based access to content.**

Knowledge management solutions generally support content creation and maintenance; control who can author, edit, or view content; and provide a workflow to route content through an approval process. By embedding authoring tools into the primary work process, such as the customer service representative’s desktop or external discussion forums, knowledge management tools make it possible for users to contribute knowledge as a natural part of their current activity or job function. Workflow is designed to support quick publication to broad audiences via multiple channels to reduce the time lag between knowledge creation and publication. This capability is especially important when critical knowledge gaps are identified during customer interactions.

When agents search and use knowledge sources, they can rank and comment on the success of searches, recommend additions or changes to an existing document, and author new solutions or modify existing ones. These easy authoring methods support best practices for content creation and maintenance so that your service organization can continuously improve knowledge within its existing Siebel or Oracle CRM On Demand desktop environment.

Permission management functionality ensures only subject matter experts see the knowledge until it is ready for wider publication.

**Embedding knowledge into the CRM application saves agent time and screen real estate, and increases new knowledge creation.**

By enabling ongoing learning and easy authoring and editing, effective knowledge bases can foster improvements in every frontline interaction. Because these knowledge solutions analyze Web sessions and present the results to a representative’s desktop along with an escalation call, the agent can focus on providing new information, rather than repeating the answers a customer may have already tried. Embedding knowledge management in the agent call handling system allows agents direct access to knowledge without requiring a new window or new application to be opened. The tight integration also allows the knowledge fields to be instantly relevant to the case being viewed, taking advantage of automatic searches and relevant contextual display of knowledge. This type of multichannel integration not only reduces call handle time, but also improves the customer’s experience.

**Based on the question, wizards can be displayed that help the customer through complex operations or troubleshooting procedures.**

When CRM is infused with knowledge management, search can display a helpful wizard that is tied to the results of a search and the content returned. This allows the wizard to take advantage of relevant data to determine the correct next step.
For example, imagine a cable-TV customer calls with a problem and the agent walks through a script to try to troubleshoot the issue: Is the router plugged in? Is the cable connected? Is it turned on? This is a frustrating experience for the customer, who has likely already checked these possible points of failure.

With sophisticated knowledge management, a troubleshooting wizard can be displayed to the customer when the customer searches the cable-TV site for troubleshooting assistance. Via Web-based services, the wizard can launch a system test of all of the customer’s products and display the results. This eliminates the need for the agent to look up the customer’s configuration and determine which services to run and launch. Instead, the wizard, driven by an advanced search capability, handles this. The wizard can also gather information about local-area conditions that might affect the customer, along with determining whether the customer has paid his or her most recent bill.

If appropriate, the wizard can reset the customer’s equipment, allow the agent to schedule a truck roll, and update the agent on the customer’s contract and whether or not an upgrade is available.

Knowledge management uses integrated search to find the correct contextual content for information gathered and driven by the wizard. This ultimately enables the wizard to skip irrelevant steps and display information appropriate for the specific customer situation.

**Various types of data repositories can be accessed from a single search.**

Indexing of all data repositories — including the knowledge base, documentation, user forums, all enterprise systems, case descriptions, problem categories, product and version data, solutions, and the customer’s profile — allows a single search to find existing knowledge regardless of where it is located.

Organizations can even index the content of other websites. For example, Intuit indexes thousands of government PDF documents in order to provide relevant contextual responses to its customers’ questions. It would be cost prohibitive for Intuit to try to replicate this content on its own site.

**It’s more efficient to use a single knowledge base for all support channels rather than dedicating an independent knowledge base to each channel.**

Agents and customers need one way to find information, regardless of location or whether their questions relate to pricing, technical specifications, bug fixes, or service disruptions.

Knowledge management solutions have evolved over time to assist organizations in meeting multichannel requirements, ensuring that organizations are able to deliver an exceptional customer experience across online and call center channels. Sophisticated knowledge management solutions capture distributed knowledge across the organization and serve it up to interested parties, such as customers and call center agents, in an easy-to-find and consumable manner. This ensures a consistent experience across all channels, while saving employees the trouble of searching multiple, disconnected, and sometimes contradictory sources. It also eliminates customers getting different, and sometimes conflicting, answers depending on the support channel accessed.
Fully integrating user forums with search helps searchers take advantage of power users.

By tapping into discussions in user forums, knowledge management can help deliver timely answers via Web self-service while saving organizations the costs associated with responding to the same questions repeatedly. Specifically, organizations can connect customers with a wide range of opinions and ideas happening in interactive peer-to-peer discussion forums, and leverage community conversations in the knowledge-creation workflow to efficiently turn social discussions into reusable answers. The user forum is simply treated as an additional knowledge source, and content in context of the question asked is prioritized into the search response along with all of the other knowledge sources.

Conclusion: Harness the Collective Power of Knowledge and CRM

To reduce overall support costs and boost customer loyalty, organizations need to find ways to enhance the productivity of contact center agents and improve the quality and speed of customer service. When it comes to customer sales and service interactions, enterprise content management simply does not provide the right tools for finding answers. Only by infusing knowledge management into the CRM process can companies help users quickly find the right knowledge to consistently deliver outstanding customer experiences.

Whether your focus is on reducing costs or improving the customer experience, there has never been a better time to investigate the benefits and productivity improvements enabled by integrating a comprehensive knowledge management solution into CRM processes.

Oracle Knowledge for Contact Center and Oracle Knowledge for Web Self Service enable deep integration with the most popular CRM applications, including Oracle’s Siebel CRM and Oracle CRM On Demand. Agents do not need to switch applications or log in separately to gain the benefits of knowledge-infused CRM. Answers from Oracle Knowledge for Contact Center can be easily linked directly to the customer’s case and reused by others in the contact center to solve similar problems. Plus, the knowledge management functionality can enhance Web self-service for fast response to customers’ online searches.

Contact Oracle to learn more about Oracle’s Knowledge for Contact Center and Knowledge for Web Self Service products.

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