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Introduction

Multi-touch strategies are proving to be highly effective in building and enhancing customer relationships. Relationships typically begin when a prospect reaches out to an organization after researching a product online. It’s one thing to create a relationship with a customer; nurturing and expanding the relationship, by anticipating and delivering what the customer needs on an ongoing basis, creates a much more profitable and long-lasting connection.

The more successful organizations have built a strategy that includes targeted and intelligent touches in a variety of channels, and when possible, in the one preferred by the customer or prospect. Contact center solutions are major contributors to selling, nurturing, enhancing and, in general, retaining and expanding relationships with customers. But this only works if an organization has the right solutions.

Contact center infrastructure has evolved and improved substantially over the past few years. Consider social media channels, which are new additions to service environments. Today, many businesses cannot conceive of life without social media, whereas as recently as two years ago many pundits discounted the power of these channels. Enterprises need to build blended servicing and sales organizations that invite customers to interact in their channel of choice, and also allow them to transition seamlessly from one to another.

It’s time for enterprises to upgrade their contact center infrastructure and evolve into multi-channel, blended, inbound/outbound environments that support sales, service, collections, help desk, scheduling and much more. This white paper presents practical and actionable best practices and tips to help organizations migrate to multi-channel blended contact center environments.

The Traditional Definition of Call Blending

Call blending is a term that has been used for years. The traditional definition of call blending is when an organization “blends” the handling of outbound and inbound calls. Typically, during an outbound campaign, organizations leave messages inviting people to call back. In a blended contact center environment, outbound agents are automatically converted to inbound agents when they receive these inbound calls, and then transition back to the outbound campaign when there are no inbound calls to handle. Conversely, there are also predominantly inbound shops that automatically transfer agents to outbound campaigns when there are not enough inbound calls to keep all of the agents busy. The purpose of a blended contact center infrastructure solution is to find the optimal mix between staff and call direction automatically. The primary challenge with these environments today is finding agents who are comfortable and effective at handling both inbound and outbound calls, as they require different skills.
Blending Channels Enhances the Customer Experience

Today’s contact center technology vastly improves the customer experience and a company’s ability to retain control of each customer contact. Blending is no longer just about handling calls. Now a customer may start a conversation on a website, interact via chat, and end up in a phone conversation. The days of making customers drop out of one channel and call back in another should be gone, but this is not the case for most companies. Blended contact center infrastructure solutions seamlessly transition customers between channels, and give agents tools to make it easy to handle customers in their channel of choice. This is the new frontier for blending, and a valuable differentiator for the companies that have this capability.

The benefits of this new approach are substantial and include the following:

1. It is an ideal method for keeping control of the customer experience, as it does not give customers an opportunity to drop out and contact another company.
2. It allows customers to use their channel of choice.
3. It allows a company to deliver a consistent experience throughout all channels.
4. It reduces operating costs by allowing the same agent to stay with the customer as they move between channels.
5. Customers do not have to repeat their information when they transition between channels.
6. It ensures integration between channels.
7. It shows that a company is highly innovative and technically savvy.

Blending is a highly valuable activity, whether it’s done in the traditional way or via the multi-channel approach. Its benefits come from making it easy for customers and prospects to receive consistent and uninterrupted assistance, whether they call or use a different channel.

Blending Manual and Automated Interactions

Proactive customer care (PCC), also known as multi-channel outbound notification, is one of the most inexpensive and effective forms of service available to organizations today. PCC is a process where organizations use multi-channel servers to interact with customers in their channel of choice, which could even vary depending on the time of day.
The concept of PCC is not new. Organizations have been making welcome calls for years. For as long as there have been credit cards, fraud departments have been calling out to customers to notify them of potential problems with their accounts. Service-oriented department stores and other high-end retailers have been calling their big spenders to notify them of sales. Companies have performed these activities because they have proven highly beneficial in building customer relationships and increasing revenue. But it also turns out that proactive customer care is a highly effective way of reducing operating costs while increasing customer allegiance and loyalty. Customers are grateful to learn when their airplane is delayed or that they are due for a prescription refill, particularly if this information is shared in a manner that is convenient and not overly intrusive.

Keeping customers informed can greatly reduce servicing costs and unexpected surges in call volume. Assuming that it costs $5 to $25 for a typical inbound customer service call or email, and $0.03 to $0.05 for a typical automated outbound interaction, it's impossible to argue with the math. Figure 1 shows various uses of PCC and how powerful and effective it is at increasing enterprise profitability while improving the customer experience.

Figure 1: High-Value Uses of Proactive Customer Care

Source: DMG Consulting LLC, April 2013
Enterprises need to find a balance between live agent support and automated outbound interactions. Although PCC reduces the cost of outbound interactions, it is not always the most effective way to interact with customers. The power of today’s contact center infrastructure solutions is that they give users the flexibility and functionality to interact with customers in many different ways. They literally blend old and new channels, inbound and outbound interactions, and automated and manual activities. Leading companies have built strategies to identify the optimum methods and channels for interacting with their customers and prospects.

**Steps for Converting an Inbound Contact Center to a Blended Environment**

A majority of contact centers do not yet use any form of blending. This is due to the limitations of many of the contact center infrastructure solutions in use, as well as an outdated management philosophy that restricts the channels that agents support. It is no longer a question of if this will change – only when. Here are tips for transitioning an inbound contact center to a blended environment.

1. Build a business case that justifies the need for the investment by showing quantifiable benefits. The analysis should include cost savings and incremental revenue, and also list soft benefits from categories such as improved customer loyalty.

2. Get senior management approval by proving the case with numbers.

3. Identify the new technology and applications, such as a universal queue, that will be needed to convert the department to a blended environment.

4. Create a new department mission statement that lays the foundation to alter the function of the department.

5. Get the staff on board with the new mission so that they see it as a positive development.

6. Update agent goals to properly set expectations.

7. Introduce a pay-for-performance compensation plan that motivates agents to change, and possibly to take on new responsibilities. (For example, having service agents sell, or having phone agents handle emails and chat sessions.)

8. Update all department policies and procedures to reflect the new responsibilities and any new technologies.

9. Retrain the staff so that everyone knows what is expected of them in the upgraded operating environment, and how to do their jobs.
10. Update and enhance the quality assurance program to incorporate the handling of new channels, which may be outbound calls or additional forms of communication.

The servicing and sales worlds are changing, and so must agents. Customers and prospects around the world are making it clear that single-channel environments are not satisfying. As agents are asked to take on additional responsibilities, their compensation should be reviewed and upgraded in a manner commensurate with their expanded responsibilities.

Building a High-Touch Customer Strategy

Outbound dialing has transitioned to multi-channel, multi-touch servicing that uses a combination of applications and channels to interact with customers. Social media will play a very important role in the future of servicing and sales, and is clearly front-of-mind for all leading organizations, but needs to be incorporated proactively within the servicing fabric of all institutions. It is clear that outbound dialing has changed for the better, but the progress is just beginning. Figure 2 reflects the future of outbound dialing and how it will be impacted by multiple channels, analytics and intelligent contact center infrastructure.

Figure 2: The Future of Dialing in a Blended World

Source: DMG Consulting LLC, April 2013
Final Thoughts

Technological innovation in the contact center infrastructure market is empowering managers to improve the way they interact with customers and prospects, enabling companies to better engage with and retain their customers and reduce operating costs. In the era of social media and multi-channel servicing, a blended approach to service has grown in importance. Blending inbound and outbound calls is no longer an option; it is an operating imperative. Blending has taken on new meaning in the last few years. Companies that want to remain relevant to their customers and prospects while keeping servicing costs under control will need to transition their organizations to multi-channel environments that seamlessly blend the handling of all types of interactions.
About Five9

Five9 is the leading provider of cloud contact center solutions, bringing the power of the cloud to more than 1,800 customers worldwide and facilitating more than three billion customer interactions annually. Since 2001, Five9 has pioneered the cloud delivery model, helping contact centers of every size transition from premise-based solutions to the cloud. Five9’s unparalleled expertise, technology, and ecosystem of partners helps businesses take advantage of a secure, reliable, scalable cloud contact center solution to create exceptional customer experiences, increase productivity and boost revenue. For more information visit www.five9.com.

About DMG Consulting

DMG Consulting LLC is an independent research, advisory and consulting firm that provides strategic and tactical advice to enterprise and contact center managers, vendors and the financial community. Our mission is to help clients build world-class contact center and back-office environments by leveraging technology, processes and people. We provide insight and guidance to assist management in optimizing performance by increasing operational efficiency, providing an outstanding customer experience, enhancing loyalty, and increasing sales and profits. DMG devotes more than 10,000 hours annually to researching various segments of the contact center, analytics and back-office markets, including vendors, technologies, best practices, solutions and their benefits and ROI. More information about DMG Consulting can be found at www.dmgconsult.com.