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# Customer service and sales

Enhancing customer experience while bolstering brand reputation



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## Enhance customer experience while bolstering brand reputation

Work data is providing a new source of intelligence to identify bottlenecks in internal processes that may be impacting relationships with customers. This data is not only providing intelligence to understand internal processes but can also be used to better understand how to enhance customer service efforts and, in the process, support better sales. This data is increasingly allowing organizations to tailor support and sales interactions in real-time by, for instance, using AI to analyze the content of a customer service call to help agents better address the problems surfaced in the call.

These kinds of initiatives benefit the organization by improving the profitability of sales interactions, but they also benefit workers. One recent study looked at the use of AI tools to support customer service agents and found that not only did these tools help agents work more effectively and resolve complaints faster, but in the process, they could improve job satisfaction and reduce worker turnover. Additionally, AI and related technologies can help augment uniquely human capabilities to build customer empathy and improve the overall work environment.

While these kinds of efforts show potential to strengthen sales while improving worker experience, it is important for organizations to be mindful of consent laws and potential privacy risks involved with collecting data from customers and workers.



# Improving internal processes that may be impacting relationships with customers

## Representative data sources

- Internal work conversations within sales and customer service teams
- Interactions with clients

## Representative technology areas

- AI (Voice analytics and text analytics)

## Shared value creation

### Individual level

- Improved situational awareness of customer needs
- Less time spent on information transfer allowing more time for value addition
- Focused training and coaching to improve work effectiveness

### Team level

- Improved information sharing
- Improved visibility among teams

### Enterprise level

- Improved sales performance

## Use case maturity

Exploratory	Emerging	<b>Maturing</b>
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## Key challenge<sup>2</sup>

At a travel management company, legacy workflows often led to customers interacting with multiple agents on the sales team and the customer service (CS) team. Each interaction required customers to repeat the purpose of their call.

This workflow created multiple challenges for customers and sales and CS agents such as sub-optimal customer experience, potential loss of critical information during transition between multiple agents, and limited time available for agents to up-sell or cross-sell.



## Solution and approach

To address these challenges, the company leveraged a software application that recorded all the previous conversations with clients including conversations with the sales team and follow-up conversations with the CS team. This single source of data enabled better alignment between the sales and CS team—what was promised and what's being delivered.

In addition, it helped with a seamless transition among different CS agents. The duration and tonality of a conversation are benchmarked against the industry's and company's best practices to identify areas of improvement. In addition, transcription and keyword search features allowed the team to get a sense of the customer's sentiment, address their needs, and understand whether it's an appropriate moment to up-sell or cross-sell.

Depending on the customer sentiment, information can be shared with the relevant internal teams. For instance, product feedback can be shared with the product development team or a customer appreciation can be shared with the sales team.



## Impact

The centralized application enabled a regular validation of what was agreed with the clients. It also facilitated a smoother handover by limiting the bias of selective memory and administrative work with relay of information. As the result, the company reported 20% improvement in sales efficiency.

# Simulating call center operations and workflows

## Representative data sources

- Call Management Systems (CMS)

## Representative technology areas

- Process automation (digital twin and machine learning)

## Shared value creation

### Individual level

- Better workload management for agents

### Team level

- Optimized planning, staffing, and workflows
- Improved utilization for agents

### Enterprise level

- Higher customer satisfaction
- Optimized resource costs

## Use case maturity

Exploratory	Emerging	<b>Maturing</b>
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## Key challenge<sup>3</sup>

A telecommunications company was looking for ways to improve the performance of its call centers by enhancing the utilization of its call handling agents, reducing call wait times, and improving customer experience.

Changes in call volumes and work schedules (accelerated by the COVID-19 pandemic) required a more dynamic view of the call center operations, scheduling of agents, and maintaining customer service level agreements.



## Solution and approach

By leveraging the Call Management Systems (CMS) data for all their inbound and outbound calls, the company built a digital twin of their call center operations to visualize its live status and performance. The application allowed the user to experiment in real-time, by varying staffing or making operational changes to see the impact on expected performance.

A user could test the impact of different decisions related to work shifts, different ways of routing calls, and sudden surges in demand, on the call center KPIs. The application provided a detailed view of future performance based on current staffing plans, operational setup, and forecasted demand.



## Impact

The effort led to resource cost savings ranging from 6% to 14% while maintaining customer satisfaction scores. Also, the new resourcing strategy led to call center efficiency gains of 5%. Driven by the benefits, the solution was rolled out across locations to drive business efficiencies.

# Augmenting customer service calls and improving work environment

## Representative data sources

- Online chats of resolved customer complains

## Representative technology areas

- AI (generative AI)

## Shared value creation

### Individual level

- Improved work effectiveness
- Personalized real-time coaching
- Reduced stress during long chats

### Team level

- Faster learning curve within teams

### Enterprise level

- Reduced attrition
- Reduced training costs
- Reduced time to train new staff
- Improved customer satisfaction

## Use case maturity

Exploratory	<b>Emerging</b>	Maturing
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## Key challenge<sup>4</sup>

A Fortune 500 company that provides administrative software for accounting and logistics to small businesses was facing high attrition in their customer support team. Customer service agents resolved customers' queries about the software through online chat windows and not live calls.

Each chat typically lasted about 40 minutes. During these long conversations, customer service agents need to resolve technical queries that are sometimes not straightforward and maintain their composure with difficult customers. This could potentially lead to a stressful work environment and high attrition. As a result, the company had to constantly spend resources on hiring and training new staff.



## Solution and approach

The company adopted a generative AI model trained on past conversations between agents and customers, enabling the model to identify common problems faced by customers, potential effective resolutions, and key phrases that resonated well with customers.

Agents were given an AI chat feature with information about the company's software that they can refer to readily during a live conversation. Based on past customer conversations, the chatbot recommends key phrases that have worked well in past conversations.

The application also helped train new hires or less-experienced hires on the best practices demonstrated by the company's top performers.



## Impact

With the adoption of real-time and ongoing generative AI conversations, agents were able to troubleshoot more issues per hour and the average productivity of agents increased by 14%. Turnover declined, especially among the new hires as lower-skilled new workers saw more benefits of using the system which shortened their learning curve in the organization.

Customer satisfaction also increased; they gave higher ratings to the staff, and they were less likely to ask to speak to an agent's supervisor.

# Improving empathy with clients

## Representative data sources

- Calls between case managers and clients

## Representative technology areas

- AI (Voice analytics)

## Shared value creation

### Individual level

- Improved work effectiveness with real-time recommendations and personalized coaching

### Team level

- Improved knowledge sharing

### Enterprise level

- Reduced call handling duration
- Improved customer satisfaction

## Use case maturity

Exploratory	Emerging	<b>Maturing</b>
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## Key challenge<sup>5</sup>

A short-term disability insurance carrier catered to clients who were experiencing a short-term disability and an interruption in their ability to work. The insurance carrier helped these clients recover and get back to work soon. Through their call quality monitoring application, the insurance carrier learnt that although their disability case managers (DCM) were complying with the organization's processes, their client satisfaction scores were stagnant, and workers' engagement with clients was declining.

Analysis of the data revealed that while the DCMs were communicating accurate information, they were not able to build a rapport with the clients, which the clients perceived as lack of/low empathy. This disconnect between the client and case managers was limiting the case managers' ability to engage clients in programs that could help them heal and return to work soon.



## Solution and approach

The company deployed a live application to provide real-time guidance during a call. The application provided visual cues on the screen to the DCMs to: (a) make their communication more succinct to address the clients' needs more promptly and (b) make their communication style more empathetic.

The application also helped with training and onboarding. Earlier, supervisors had to rely on analysis of a subset of the call data, which was also delayed. This application enabled supervisors access to the full conversation dataset, derive insights into their teams' speaking behaviors, and identify, share, and replicate best practices across teams.



## Impact

On a regular basis, the application led to a positive impact on both DCMs and clients. By communicating with empathy and succinctness, the DCMs were able to reduce their call-handling time by 23%. The clients' recovery also saw an improvement and the organization saw a 17% improvement in clients returning to work early.

# Endnotes

- 1 Greg Rosalsky, [This company adopted AI. Here's what happened to its human workers](#), NPR, May 2 2023.
- 2 [Sky's the limit: How Corporate Traveler uses Gong to refine their customer journey](#), Gong.io Inc.
- 3 Deloitte client solution ; [How twin tech is helping\\_VOIS design a new future](#), Deloitte, 2020.
- 4 Greg Rosalsky, [This company adopted AI. Here's what happened to its human workers](#), NPR, May 2 2023.
- 5 [Improving Member Engagement in Disability Insurance](#), Cogito, December 2020.





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