“How to bring efficiency to the Backoffice: An iWD practice case”

Intelligent Workload Distribution

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Gustavo Pellegrino– Strategic Solutions & Architecture Manager
G8: Expanding Customer Touch Points

- In person
- Social Communities
- Mobile
- Web
- Contact Center
Customer Strategy, not Channel Strategy
..meanwhile in the Back-Office:

No Visibility, No Metric, No Report, No Priorities..
Service Delivery Optimization

The importance of meeting customer expectations is clear...

70%

Consumers said they had ended a relationship due to poor customer service alone.

Ovum and Genesys Research
Service Delivery Optimization

Requires an enterprise view, including resources in the back-office...

3:1

3 back-office workers for every contact center agent, involved in service delivery

Genesys Research

28%

Of back-office worker’s time that is considered unproductive

Genesys Research; Basex Research Report “Information Overload” 2008
The Business Pain Points

Contact Center
Voice, VoIP, GVP, Web Chat, Email, SMS, Facebook…

• Efficiency of Operations
• Cost-Effective
• Resource / Utilization focus
• Service Objective SLA Orientation
• Business Insights / Reporting

Back Office
Service Requests, Claims, Loan Apps, …

• No differentiation based on customer or task value
• High value tasks stay in queue for longer than desired
• Unknown SLAs / lack of visibility
• Lack central processes and work distribution principles

Contact Center Agents

Back Office / BPO / Expert Workers
Service Delivery Optimization

• Key Issues that exist in organizations...

**Human Latency**
- Employees set the pace of work
- Employees manage the priorities
- Even with automation, there are exceptions

**Lack of Business Agility**
- New process starts as short-term solution that remains
- Inability to respond to market opportunities, or threats
- Within and across departments, and brands

**Limited Insights**
- Resource and Work
- Accuracy and objectivity through “self reported” data
- Prevents continuous improvement

**Customer Frustration**
- Inability to deliver to customer expectation
- Often results in repeat contacts “where is my order?”
- Lost customer / Impairs Up-sell
Service Delivery Optimization

- **Key Trends...**

<table>
<thead>
<tr>
<th>Customer Centricity</th>
<th>Service Objective Focus</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ Every employee becomes customer-facing</td>
<td>▪ Differentiate tasks based on value, regardless of channel</td>
</tr>
<tr>
<td>▪ Front office and back office distinctions erased</td>
<td>▪ Dynamic value calculations on changing conditions</td>
</tr>
<tr>
<td>▪ All decisions weigh the impact on customer experience</td>
<td>▪ Right First Time, matching work to skill</td>
</tr>
</tbody>
</table>

<table>
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<tr>
<th>Increased Visibility</th>
<th></th>
</tr>
</thead>
<tbody>
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<td>▪ Real-time monitoring of work and resources</td>
<td>▪ Reporting end-to-end</td>
</tr>
<tr>
<td>▪ Enables a culture of continuous improvement</td>
<td>▪</td>
</tr>
</tbody>
</table>
Service Delivery optimization
3 key pillars

**Performance**
Be efficient in getting work done, and effective in choosing the right work

**Quality**
Ensure work completed is done so according to customer and company expectations

**Transparency**
Be accountable for achieving shared goals and objectives at individual and team level

Customer Centricity

Service Objective Focus

Increased Visibility
Service Delivery Optimization

- Is not about transforming your back office into a contact centre; they are very different from each other,

  *but they do share a common goal...*

- In the ability to **automatically prioritize, route and distribute** work based on:
  1. Customer and process value
  2. Employee skill set and proficiency
  3. Employee workloads /SLA
  4. Impact on costs and revenue
What is it on the table?

- Don’t compare iWD to BPM solutions
- BPM is responsible for the ENTIRE BUSINESS process
  - iWD is responsible for a portion of the process
  - iWD – Service Delivery Optimization
- “Get the Right piece of work to the Right resource at the Right time”
A Real Case for Success...
In the past, work was allocated manually, prone to cherry picking, and results inefficient operations.
The Question: How Can We use our actual Contact Center Infrastructure?

Contact Center Manager
The answer... (Business concept not Technology)
What We do??

**Genesys iWD**
- Capture
- Calculate
- Distribute

**Genesys CIM**
- iWD Priority & SLA Services
  - Prioritization
  - Classification
    - Rules Service
    - Tasks, Config & Audit

**Agents Front**
- Customer Segment / Value
  - Capacity Rules
    1. Voice: 1 Interaction any Type
    2. IWD: 1 Interaction any Type
    3. E-mail: 1 Interaction any Type

**Agents Back**
- Agent Availability & Agent Skill
Genesys iWD automatically prioritizes and distributes work to the right skilled resource.

**CRM, BPM, & Business Applications**

- Incoming requests
- Process
- Process

**Prioritized Global Task List**

- Prioritized based on Business SLAs

**Virtual Workforce**

- Enterprise

**Optimized Allocation**

- Prioritized Distribution
Process Step Optimization

Step Timeline

Queue → Pull → Validate → Execute → Output

Wait → Execution by Agent

Optimized Process Step
Overall Process Optimization

- Customer
- Interaction
- Customer Segment / Value
- Agent
- ChargeBack
- Analisys
- Approval
- Reverse
- Optimized Overall Process Timeline
- Progress Results
Optimization Value

✓ **Efficiency** tied to reduction of delay and execution time for each step and for total process

✓ **Effectiveness** tied to overall process SLA as measured by time (seek reduction…LEAN concept)

✓ **Revenue** tied to whatever is “produced” at the end of the process, and how creating efficiency for each step and for total provides ability to “process more”, shorten overall cycle time contributing to increased revenue and faster recognition
## Change of Concept: Back Office KPI Metrics in Real Time

| Worker Name                        | TotalLogonTime | TotalTasksReceived | AvgTimeWDTasks | CurrentAgentState | TasksReceived | AvgTimeWDTasks | TasksReceived | AvgTimeWDTasks | TasksReceived | AvgTimeWDTasks | TasksReceived | AvgTimeWDTasks | TasksReceived | AvgTimeWDTasks | TasksReceived |
|------------------------------------|----------------|--------------------|----------------|-------------------|---------------|----------------|---------------|----------------|---------------|----------------|---------------|----------------|---------------|----------------|---------------|----------------|
| Ana Maria Silva Arana              | 00:17:37       | 0                  | 00:00:00       | NotReadyForNextCall (09:10:07) | 0             | 00:00:00       | 0             | 00:00:00       | 0             | 00:00:00       | 0             | 00:00:00       | 0             | 00:00:00       | 0             | 00:00:00       |
| Diego Armando Lopez Pedraza        | 00:16:14       | 2                  | 00:00:05       | NotReadyForNextCall (09:11:16) | 0             | 00:00:00       | 0             | 00:00:00       | 0             | 00:00:00       | 0             | 00:00:00       | 0             | 00:00:00       | 0             | 00:00:00       |
| Esperanza Parra Riazo              | 00:15:28       | 13                 | 00:00:10       | NotReadyForNextCall (09:04:07) | 0             | 00:00:00       | 0             | 00:00:00       | 0             | 00:00:00       | 0             | 00:00:00       | 0             | 00:00:00       | 0             | 00:00:00       |
| Oruela Martínez Luz Marina         | 00:17:24       | 0                  | 00:00:00       | NotReadyForNextCall (09:11:22) | 0             | 00:00:00       | 0             | 00:00:00       | 0             | 00:00:00       | 0             | 00:00:00       | 0             | 00:00:00       | 0             | 00:00:00       |

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### Graphs:

- **TotalLogonTime**
- **TotalTasksReceived**
- **AvgTimeWDTasks**
- **CurrentAgentState**
- **TasksReceived**
- **AvgTimeWDTasks**
9. IWD – Increased Occupancy

Aumento de productividad Por franjas

<table>
<thead>
<tr>
<th>CPR Objetivo por Jornada</th>
<th>No agentes</th>
<th>Turno</th>
<th>AVG &amp; Ocupacion</th>
<th>Δ % Ocupacion 90%</th>
<th>Aumento de horas Productivas</th>
<th>Total Ocupacion</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPR Madrugada</td>
<td>1</td>
<td>6:00:00</td>
<td>12%</td>
<td>78%</td>
<td>4:40:48</td>
<td>90%</td>
</tr>
<tr>
<td>CPR Jornada Mañana</td>
<td>5</td>
<td>6:00:00</td>
<td>62%</td>
<td>28%</td>
<td>8:24:00</td>
<td>90%</td>
</tr>
<tr>
<td>CPR Jornada dia</td>
<td>2</td>
<td>6:00:00</td>
<td>78%</td>
<td>12%</td>
<td>1:26:24</td>
<td>90%</td>
</tr>
<tr>
<td>CPR Jornada tarde</td>
<td>7</td>
<td>6:00:00</td>
<td>64%</td>
<td>26%</td>
<td>10:55:12</td>
<td>90%</td>
</tr>
<tr>
<td>CPR Jornada Noche</td>
<td>12</td>
<td>6:00:00</td>
<td>42%</td>
<td>48%</td>
<td>10:33:36</td>
<td>90%</td>
</tr>
<tr>
<td>Agentes Backoffice</td>
<td>22</td>
<td>8:00:00</td>
<td>65%</td>
<td>25%</td>
<td>20:00:00</td>
<td>90%</td>
</tr>
</tbody>
</table>

Objetivo % ocupacion 90%

Incremento en Horas Productivas 104:00:00
Horas laborales Por agente 8:00:00
Ahorro en FTE 13
## Service Delivery Optimization Business Benefit

### Report Voice

<table>
<thead>
<tr>
<th>Agente 1</th>
<th>Login Time</th>
<th>Handled Calls</th>
<th>Tiempo ACD</th>
<th>Tiempo Hold</th>
<th>Tiempo ACW</th>
<th>Total Inbound Time</th>
<th>% Occupancy Inbound</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>8:02:49</td>
<td>81</td>
<td>5:31:52</td>
<td>0:00:04</td>
<td>0:00:00</td>
<td>5:31:56</td>
<td>68.7%</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Agente 2</th>
<th>Login Time</th>
<th>Handled Calls</th>
<th>Tiempo ACD</th>
<th>Tiempo Hold</th>
<th>Tiempo ACW</th>
<th>Total Inbound Time</th>
<th>% Occupancy Inbound</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>8:46:31</td>
<td>73</td>
<td>6:31:54</td>
<td>0:00:01</td>
<td>0:00:00</td>
<td>6:31:55</td>
<td>74.4%</td>
</tr>
</tbody>
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### Report IWD

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<table>
<thead>
<tr>
<th>Agente 2</th>
<th>Login Time</th>
<th>Handled Calls</th>
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<th>Tiempo ACW</th>
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<td>0:00:00</td>
<td>6:31:55</td>
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</tr>
</tbody>
</table>

- **Voice IWD**:
  - Login Time: Agente 1: 8:02:49, Agente 2: 8:46:31
  - Handled Calls: Agente 1: 81, Agente 2: 73
  - Tiempo Hold: Agente 1: 0:00:04, Agente 2: 0:00:01
  - Tiempo ACW: Agente 1: 0:00:00, Agente 2: 0:00:00
  - % Occupancy Inbound: Agente 1: 68.7%, Agente 2: 74.4%

- **IWD**:
  - Total Task Received: Agente 1: 15, Agente 2: 10
  - % Occupancy Task IWD: Agente 1: 21.9%, Agente 2: 17.5%

### % Occupancy Total

<table>
<thead>
<tr>
<th></th>
<th>90.6%</th>
<th>91.9%</th>
</tr>
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</table>

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The report provides detailed metrics for service delivery optimization, including login time, handled calls, time in various states (ACD, Hold, ACW), total inbound time, and % occupancy for both Voice and IWD. This data is crucial for assessing performance and optimizing service delivery processes.
Put your Customer at the Center

- We are the only ones with the ability to listen to our customers in different channels of interaction
- We know what are we doing wrong because we have first hand information from our customers
- This solution let us to operate based on proactive and strategic decisions enhancing customer personalized experience
IWD

the new conversation