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Creating an AI First
Customer Access
Strategy with
Conversational AI

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Introduction

Until recently, companies' customer access strategy (CAS) has largely been driven and limited by technology. Communication technology has evolved so rapidly that consumers have typically been several steps ahead of both organizations and the vendors who provided enterprise solutions. This has frequently led to limited, out-of-date options for customers as well as a mix of ad-hoc point solutions attached to existing systems. The result has been bad for both sides.

Conversational Artificial Intelligence (CAI) is revolutionizing the landscape, freeing organizations from choosing based on limitations and allowing them to instead choose based purely on customer demand and their strategy.
In this whitepaper, we'll take you through how to put CAI at the heart of your strategy and break the chains of legacy systems.

What is a **Customer Access Strategy (CAS)?**

Let's begin by citing the patron saint of contact centers, Brad Cleveland:

> " A customer access strategy can be defined as a framework—a set of standards, guidelines, and processes—describing the means by which customers and the organization can interact and are enabled to access the information, services, and expertise needed."
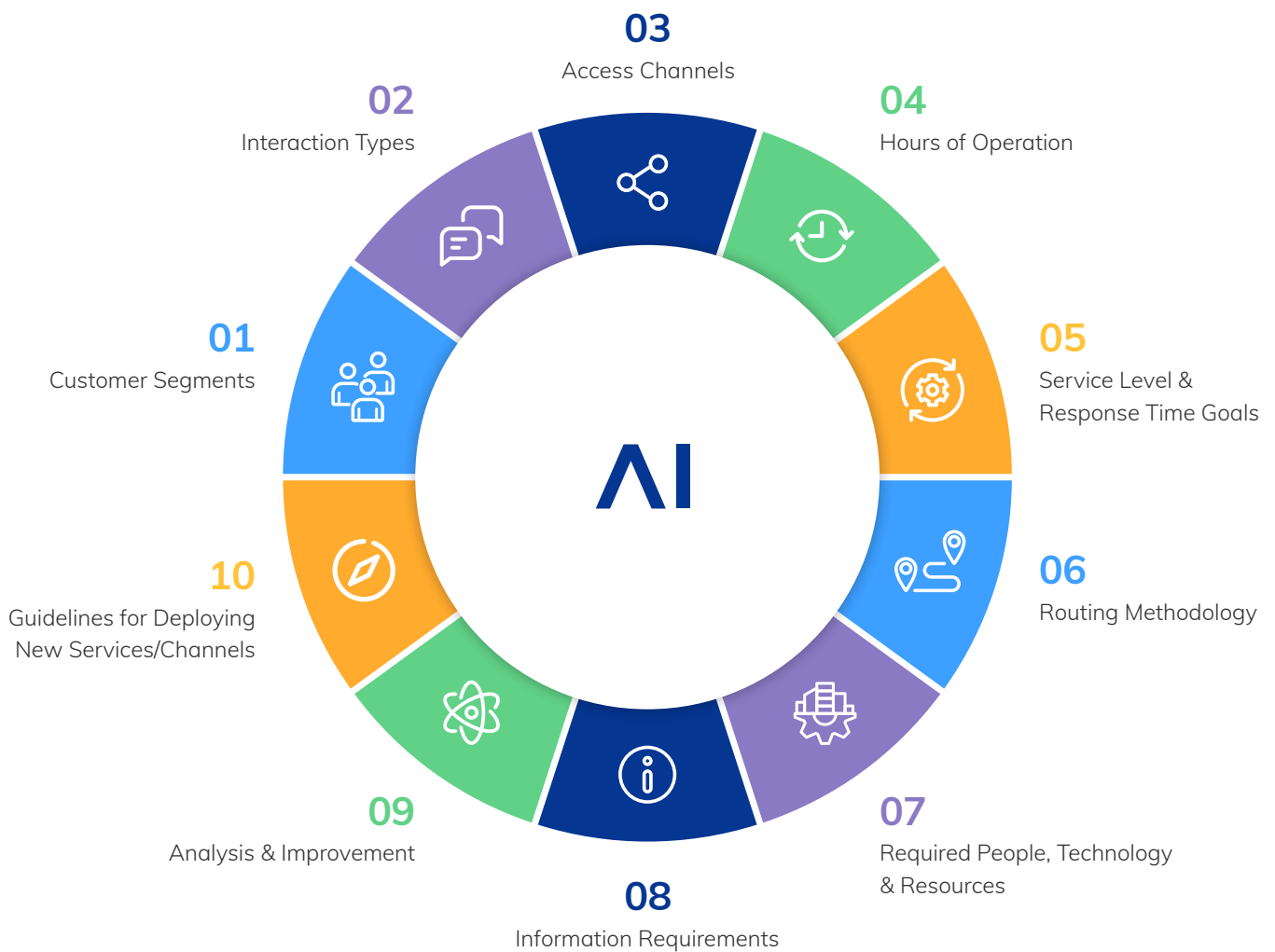>
> – Brad Cleveland

If you're like most organizations, you may have a plan collecting digital dust somewhere on a shared drive. Indeed, the pace of change has often been so swift as to quickly render your plan moot, not long after execution. But have no fear, better days are here.

Whether you're a 50 or a 5,000 person company, customers want your help. Updating and rethinking your current customer access strategy based not only on the chaotic last few years but also on the rapid changes in technology will help you close your customer service gap and provide service loved by everyone (including agents).

The 10 Components of Your Customer Access Strategy

Before understanding where CAI fits into your strategy, it's important to consider it in detail. Like any business plan, your CAS is a framework and is built from the following ten components.

03
Access Channels

02
Interaction Types

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Hours of Operation

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Customer Segments

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01
Customer Segments

Identify and define your customer and prospective customer groups. This may be based on location, purchasing behavior, business volume, CLV (Customer Lifetime Value), or other custom criteria relevant to your business, such as frequent flyers. For example, you may want to separate frequent flyers into the highest tier and then include all others in a separate segment, offering 24/7 immediate human service exclusively to the very top tier. Create as many segments as necessary, but avoid going overboard. Lastly, define how you will serve each group

02
Interaction Types

Before we can start discussing channels, you first need to map and define different interaction types by each segment. This means customer intents, or the topics and issues that customers contact you with.

Airline

- Change reservation
- Update personal information
- Lost Baggage
- Document problems
- Cancel reservation

Retail

- Opening hours
- Product question
- Returns & Exchanges
- Shipping
- Damaged items
- Billing

Finance

- Rate Quotes
- Check Balance
- Verify new card
- Fraud & Disputes
- Lost/Stolen Card
- Technical Problem with app

While you're developing this list, keep in mind which of these segments could be automated (even if they are not currently). Remember, according to Gartner, live channels cost an average of $8.01 per contact, while self-service channels cost a mere $0.10 per contact.

03
Access Channels

Now comes the fun part where we define the communication channels you'll offer to customers, along with the corresponding phone numbers, URLs, email addresses etc. connected to each channel.

Voice

Digital

Social Media

Messaging

This exercise is more than simply listing channels; it also involves determining who will be served through each channel and how they will be served. It is also the stage where friction often arises as organizations end up with multiple point solutions, such as one for several social channels, a separate application for web chat, one or multiple email inboxes, and so on.

This can become a nightmare for managing channels, delivering consistent service across channels, and even when customers switch channels during the same interaction. However, we will return to this topic soon as it relates to Conversational AI.

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04
Hours of Operation

At the risk of explaining the obvious, every channel will demand a different schedule appropriate to each. Email is asynchronous and thus easier to deal with, while messaging apps tend to be active most of the day. But, before making your list of times, it's important to keep in mind the distinction between self-service and service via your human agents.

You may staff WhatsApp for standard working hours with humans while offering self-service in parallel, but then solely offer self-service options during off hours. Luckily, with CAI you can extend the same self-service options to many channels simultaneously without additional work or maintenance.

05
Service Level & Response Time Goals

Service level is typically defined as **'X% of incoming contacts answered by an agent within Y seconds,'** such as 90% of all contacts being answered within 30 seconds. We're not discussing handling time, the percentage of answered contacts compared to abandoned ones (when customers give up and quit), or even the longest hold time.

This definition can vary from organization to organization. When considering self-service today, some may choose to slightly modify the definition to include being answered by either a human agent or a virtual agent.

Your service level should be defined per channel as they will likely differ. You will need to decide whether you define it based on when a human answers the phone or when your Conversational IVR (Interactive Voice Response) does. With CAI, you can provide immediate responses, even if it's just for identification and verification, and then route the customer to an agent. So, keep this consideration in mind when making your decision.

In short:

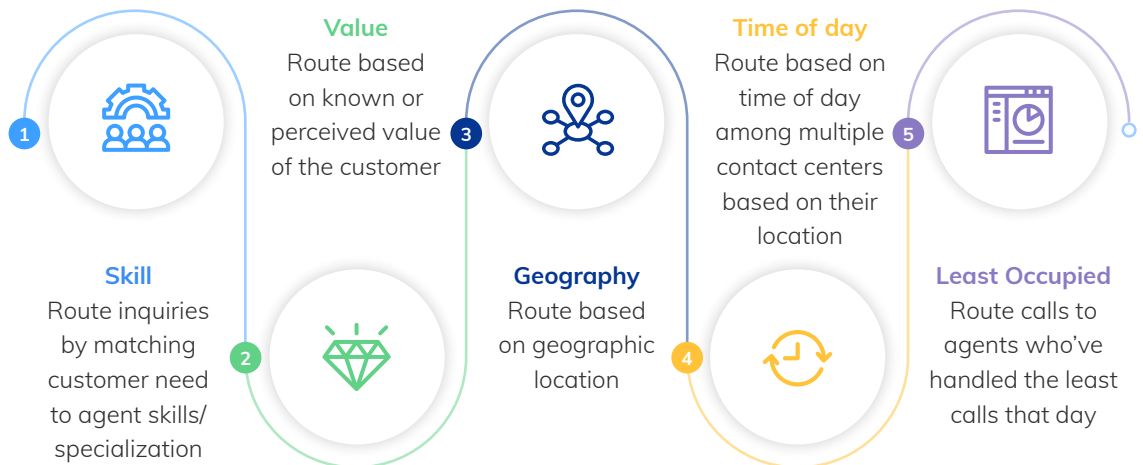- Decide whether to differentiate between human or AI answered contacts

- Define service level by segment and channel

06
Routing Methodology

Like many things, routing can be as complex or as simple as you desire. It is important to define routing based on customer segment, contact type, and channel, for both inbound and outbound contacts. There are various methods available for routing, including:

Value
Route based on known or perceived value of the customer

Time of day
Route based on time of day among multiple contact centers based on their location

Skill
1 Route inquiries by matching customer need to agent skills/ specialization

2

Geography
3 Route based on geographic location

Least Occupied
5 Route calls to agents who've handled the least calls that day

4

Whether you opt for the above, or a mix thereof, consider factors such as:

- Where and how each segment will be routed to and under what conditions
- Should any segments be routed directly to an agent
- Will you offer a self-service option while customers wait for an agent
- Should calls be routed to an agent after a specified number of self-service attempts
- Do you offer the dreaded "Press 0 for an agent" option

However, during this phase, it's important to keep your Conversational AI tech in mind as that will later be used for routing based on what the customers intent is.

07
Required People, Technology & Resources

Next, it's time to plan for both the agents and systems required to reach your customer access strategy goals. The typical contact center tech stack will generally be built on these four pillars:

CCaaS

CRM

Case Management

Knowledge Management

You may also have a mix of cloud-based and legacy on-premises systems, or even be required to use on-premises systems for regulatory reasons such as in the healthcare and financial industries.

But while many organizations may rely on a platform such as Salesforce or Genesys, which can address multiple needs at once, it's important to delve into the specific details of their ancillary technology. Often, these technologies are developed to meet minimum general requirements or added as bolt-on acquisitions.

In terms of futureproofing and scalability, it is generally better to choose a modular and agnostic solution that can integrate and work well with a wide variety of systems, rather than one designed for a single ecosystem.

Technology evolves rapidly, and even if you have the best system today, in a few years, Google may develop a groundbreaking NLU (Natural Language Understanding) technology, Microsoft may introduce the best speech-to-text technology ever, or a yet-to-be-founded company may develop something entirely new. Platforms offer convenience, but for long term agility and scalability, they turn into straight jackets.**.**

When formulating your list of technology requirements, ensure that you seek out solutions capable of effectively catering to diverse needs, while also offering a high degree of modularity and flexibility.

08

Information Requirements

Once you've got a good idea of what and who you'll need, it's time to start thinking about what information you'll require . After all, customer service is informational and transactional, and in both cases a great deal of information is needed. This includes:

- Customer information (e.g., from your CRM to identify and verify)
- Product information (instructions, technical specifications etc.)
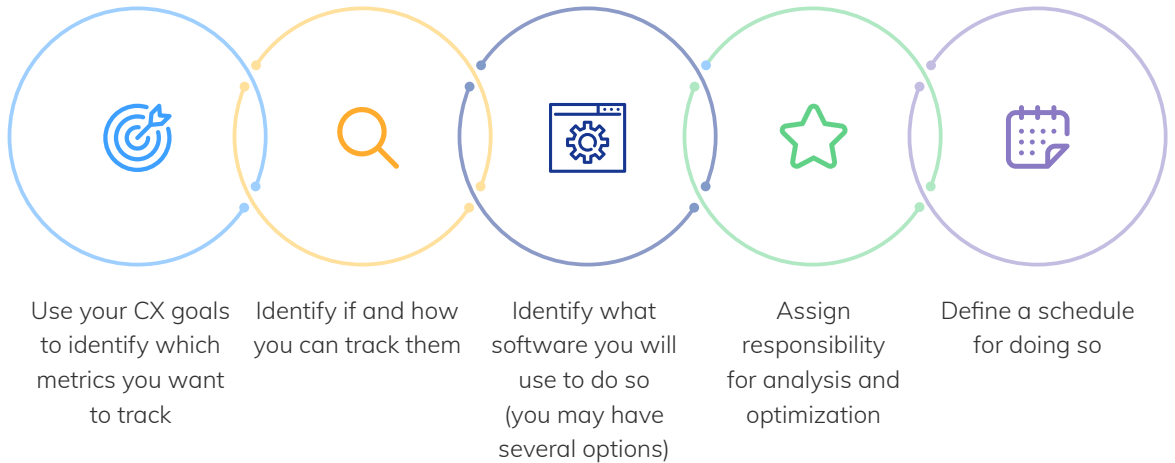- Internal policies (for returns, exchanges, warranties)
- And more...

If you've already got most of this in a single source of truth, i.e., knowledge management system, then you're a huge step ahead of most. If not, it's a good time to revisit that as scaling service and customer satisfaction is difficult if agents are still searching five places for answers. And most importantly, it's difficult to automate without centralizing your support data.

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09

Analysis & Improvement

While you certainly can't analyze and improve before you get started, you'll want to think through your strategic goals and define what you want to improve over time. This is typically how to improve service processes, services, and products or even things like cross and upselling.

| Use your CX goals to identify which metrics you want to track | Identify if and how you can track them | Identify what software you will use to do so (you may have several options) | Assign responsibility for analysis and optimization | Define a schedule for doing so |

10

Guidelines for Deploying New Services/Channels

Since you probably won't launch every possible channel at the beginning, you need to develop guidelines in advance around your technology architecture, internal corporate or IT standards, investment guidelines and so forth regarding how you will prepare and launch new service channels in the future. Depending on your tech stack, it could range from straightforward to complex. This is another key area where Conversational AI can save you many headaches down the road.

Finally, don't forget to assign clear responsibility to an individual to update and maintain your customer access strategy as things change over time. If you don't regularly refer to and maintain it, there's ultimately no point in developing one in the first place.
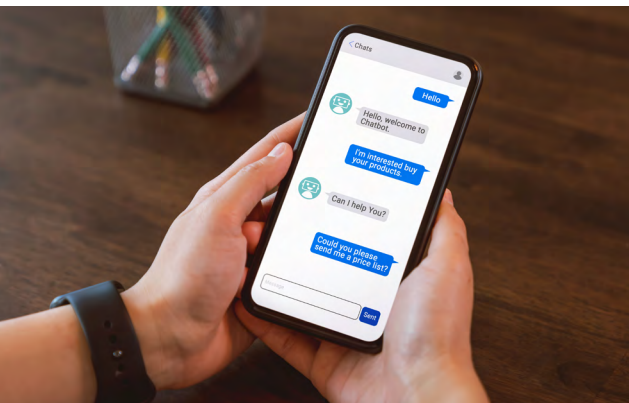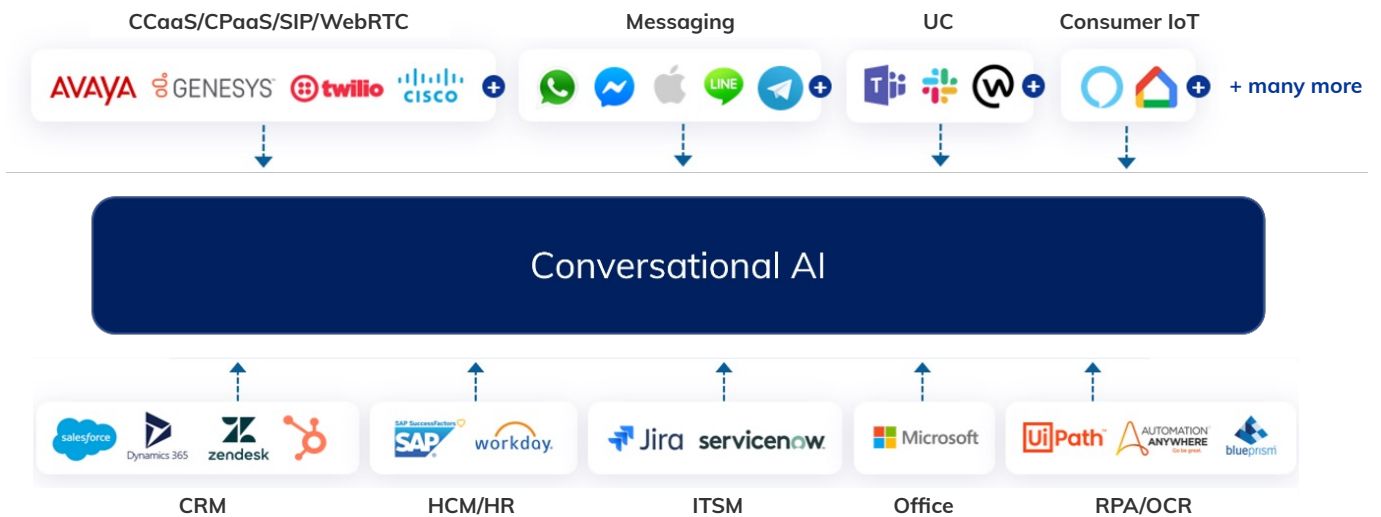
How Conversational AI
Transforms your CAS

Technology plays a central role in determining your options for customer access strategy. In the past, it often served as a limiting factor disguised as a solution. For instance, you might come across a brand-new live chat application with an amazing user interface, seemingly solving the problem. However, it may not allow simultaneous handling of Facebook Messenger, Apple Business Chat, WhatsApp, or seamless bot handover. Short-term gains often come at the expense of long-term problems.

As promised, let's discuss CAI in relation to developing your strategy. We'll start by outlining a simple, non-technical architecture plan.

The first major benefit of making CAI a central pillar of your customer access strategy is integration.

Basic Conversational AI Architecture in a Contact Center

Conversational AI, in contrast to larger platforms that offer a multitude of general-purpose solutions, acts as a meta layer, sitting above all your systems. Instead of locking you in, it has an "open-door policy" enabling you to connect and integrate dozens of systems and pass data back and forth between them. This not only enables you to connect previously siloed systems but simplifies the process, as systems typically need to integrate with your CAI instead of, for example, your CRM having to integrate with multiple other systems simultaneously.

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The second major benefit to an AI first strategy is automation. Once you've managed to integrate all, or even just some of your customer service systems, you'll discover entirely new automation possibilities. It's as if a painter had only red and yellow and you suddenly give them blue. Now they can paint an ocean, streams, lakes, rivers etc.

That's why it's critical not to simply rebuild existing processes but to brainstorm and create entirely new ones. The three main solutions based on CAI are Conversational IVR, Self-Service via virtual agents and Agent Assistance, all connected to your key systems. This provides the opportunity to put AI at the center of your strategy for inbound contacts for routing, self-service, ID&V and agent support and it looks like this:
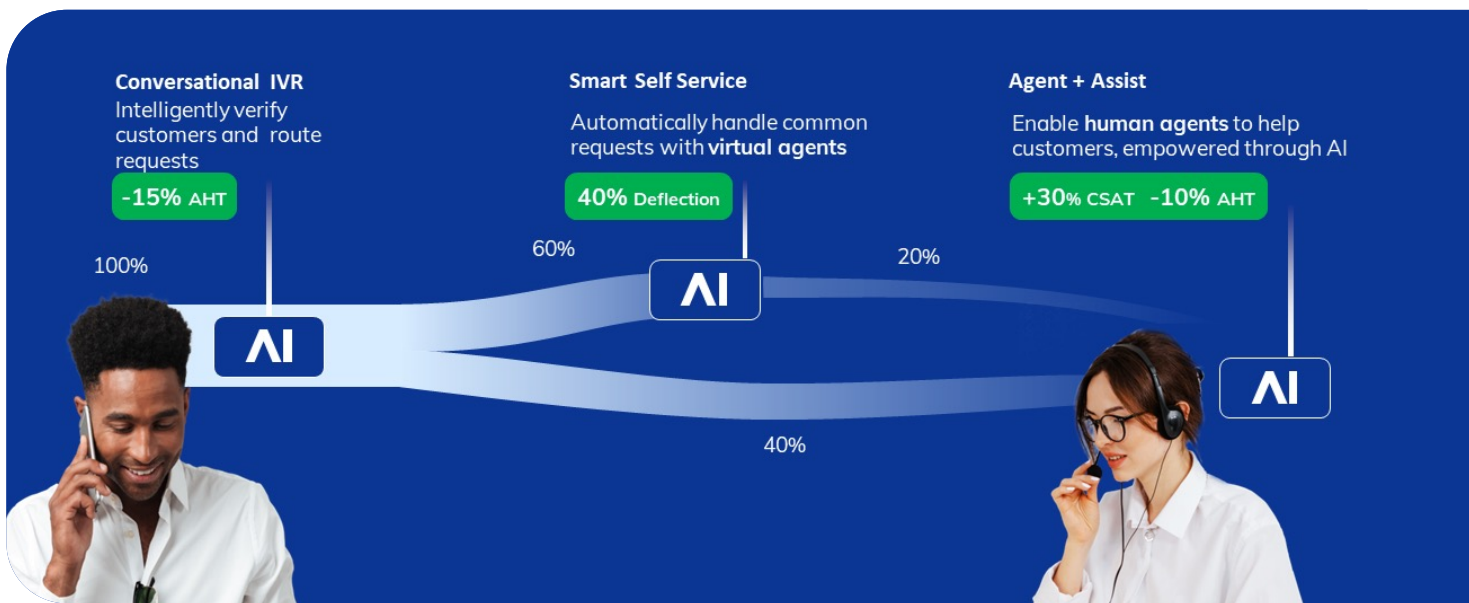
Imagine immediately answering 100% of inbound contacts in all channels, quickly identifying and verifying customers, maintaining that context, and then routing inquiries to self-service or agents. With integrations to your CRM, billing, case management or reservation system, customers suddenly have a great deal of power directly in their hands, to solve problems themselves.

The third major benefit of an AI first strategy is that by redirecting repetitive low-value work to artificial intelligence, **you'll reclaim hours upon hours of agents' time**. After all, why hire humans to then force them to act like machines. It's a waste of resources which degrades both the customer and agent experience. So, the big question is, how will you take advantage of your very best resources, your agents?
Finally, with rising contact volume and additional channels, scaling is a very real challenge to consider in advance. However, scaling is not just a matter of choosing specific software solutions, but your processes themselves. By automating a high percentage of your repetitive work, whether IVR, ID&V, routing or simple transactions, scaling transforms from a dark cloud on the horizon to a pot of gold at the end of the rainbow.

Benefits of CAI as the Core of your Customer Access Strategy

1. Integrating siloed systems
2. New automation opportunities and at scale
3. Reclaiming agents' time
4. Easy scaling

Evaluating & Choosing
Service Channels

As CX-Jedi Jeff Toister has noted, every new channel you add should pass three tests:

01
Sufficient customer demand in the channel exists

02
You can serve customers effectively in the channel

03
You can serve customers consistently in the channel

Start with a simple chart as in the example below and map out your must-serve channels to start with.

Channel	Owner (Dept.)	Sufficient Demand?	Self-Service Possible?
Phone	Customer Service	✓	✓
Email	Customer Service	✓	✓
Web chat	Customer Service	✓	✓
Video chat	Customer Service	✗	✗
WhatsApp	Customer Service	✗	✓
Facebook Messenger	Marketing	✓	✓
Apple Business Chat	Customer Service	✗	✓
Twitter	Marketing	✓	✓
Instagram	Marketing	✗	✓

When you run into conflicts, particularly with ownership of social media channels which are typically used by marketing, the simplest solution is to divide responsibilities by creating separate social channels purely for support. This will move ownership of service-related communications to your department while allowing marketing to work as usual without creating complex processes, sharing access and so forth.

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The Benefits in Numbers of a CAI focused Customer Access Strategy

Finally, let's look at benefits across roles in the organization when creating an AI first customer access strategy.

For **Customers**

- 24/7 availability
- Reduced wait and hold times
- More self-service options
- Free choice of channel
- Instant, accurate support
- No repeating yourself
- Support any language

For **Agents**

- Reduce or eliminate repetitive tasks
- Warm handover with context from virtual agents
- Receive proactive assistance from AI
- Increase time to focus on complex issues and help customers
- Increased job satisfaction & lower burnout
- Meet customer expectations

For **Contact Centers**

- Lower AHT via automation
- Contain contacts within self-service
- Meet SLA goals
- Maintain inquiry context across channels and sessions
- Automate repetitive work
- Reduce training time
- Increase consistency across organization
- Improve operation with better data/insights
- Reduce agent attrition

For **the Organization**

- Increased CSAT
- Reduce customer churn
- Decrease support costs
- Increase CLV
- Reduce vendor footprint
- Streamline and reduce friction in customer journey
- Better understand customer journey

Conclusion

Putting Conversational AI at the center of your customer access strategy will move your contact center from an industrial-era factory of repetitive tasks to a level two support center. Your human agents will have the time to focus on solving complex issues and provide the level and quality of service you've promised customers (and that they expect). Moreover, it enables you to weave all your systems together into the vision of service that you've been aiming for, but not yet reached.

To learn more:

Visit **cognigy.com** and book a free demo today!

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