

Presentation materials and video replay will be provided within one week.

Have questions? Use the chat panel on the right. We'll field them as we go and during the Q&A recap at the end of the call.

# How to Plan for High-Volume Inbound Events

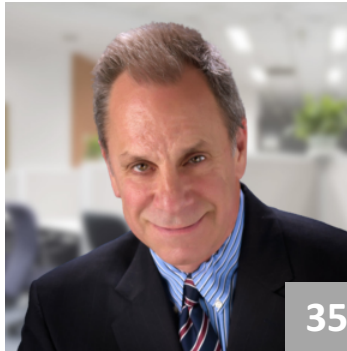
Success Strategies for Contact Center Leaders

Presented by Contact Center Solutions

April 3, 2018



# Today's Speakers



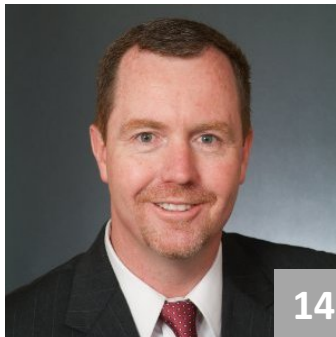
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24 Yrs Contact Center Experience



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14 Yrs Contact Center Experience



**Janet Sthele**  
Director of Client Strategy  
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20 Yrs Contact Center Experience

# Today's Agenda

- Inbound events and account holder expectations
- Lay the foundation for an excellent customer experience during a change event
- Building blocks and best practices for contact center readiness

# Account Holder Expectations

When account holders run into issues,

**73%** still prefer to *talk on the phone* <sup>1</sup>

More than **one-third** of self-service requests

are *eventually escalated to voice* <sup>2</sup>

<sup>1</sup> Source: CustomerThink, Why The Call Center Matters More Than Ever, by Joshua Feast, Jan. 2016  
<http://customerthink.com/why-the-call-center-matters-more-than-ever/>

<sup>2</sup> Source: 3CLogic, Top 6 Contact Center and Customer Service Trends for 2016, by Rachel Brink, Dec. 2015  
<http://blog.3clogic.com/top-6-contact-center-and-customer-service-trends-for-2016>

# The Account Holder Service Vision

Laying the foundation for a strong account holder service strategy begins with a strong vision

- Create a *seamless* experience for the account holder
- Adopt a customer service *focus*, beyond issue resolution, to strengthen relationships with account holders, so they are happier and more satisfied
- Boost brand *confidence* and account holder service across all touchpoints
- Achieve high-level account holder *retention* for future business growth

# Building Blocks for Contact Center Readiness

An effective service strategy and budget forecast should take into consideration the following areas of support and additional resources, from ramp up through go live and beyond:



## **RAMP UP**

### **Project planning and management**

- Leadership oversight
- Task Planning
- Timing and scheduling

### **Staffing and forecasting call volume**

- Days and hours of operation
- Handle time
- Supervision



## **RAMP UP**

### **Call routing and IVR considerations**

- Phone lines and capacity
- IVR set up

### **Communications with account holders and staff**

- Channels
- Frequency
- Messages
- Timing
  - Outbound calls
  - Tutorials
  - Branded marketing





# Account Holder Service Strategy Best Practices

## **RAMP UP**

### Training

- Change (customer's perspective)
- Systems
- Transfer procedures



# Account Holder Service Strategy Best Practices

**GO LIVE**

## Service tips for representatives

- Plus-one on every call

## Quality assurance

- Voice of the Customer
- Training impacts



# Account Holder Service Strategy Best Practices

## **GO LIVE**

### **Leadership support**

- Be visible and available
- Quick communication

### **Staffing modifications**

- Adjusting to call volume

### **Internal communications**

- Daily instant messaging
- Daily huddles
- Weekly status calls



# Account Holder Service Strategy Best Practices

## ***POST EVENT ANALYSIS***

- Preparation
- Results
- Key learnings
- Future changes



# What to Look for In an Outsourcing Supplier

- Depth of financial services expertise
- Ease of relationship management
- Adaptability and flexibility to your needs
- Security focus
- Culture of operational excellence
- Seamless alignment with your staff, culture and operation



# Q&A Wrap Up

Type your question in the chat panel 

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*Thank you*