NICE Real-Time Solutions
Demo
Q&A
INTERACTIONS: The Decisive Moments of Customer Service
Service Complexity

- Attempt a sales offer
- Listen to the customer
- Complex Processes
- Multiple Systems
- Repeat Tasks
- Ask the right questions
- Summarize call wrap-up notes
- Access customer information
- Consult the knowledgebase
- Mind the number of calls waiting
- Adhere with regulations
- Avoid manual entry & process errors
Rewards Credit Card

Offer of the Month:
- Autopay
- Premium Rewards

In case of past due payment - MUST ask if customer agrees to pay

Different payment methods:
- CC
- Bank Transfer
- Checks

CALLS
- Dr. Hour
- Diana

Past due payment:
- If payment not received, account frozen for non-payment.
- If this happens, pay total account balance, additional deposit + late payment fee

Switch Friday AM shift with Michael

Buy milk
What’s Missing?

ACCESS

DECIDE

ACT

IMPROVE
Past Due Account

Say: "Your account has a past due payment of 143.21$. If a late payment notice was read to the customer, you will be required to pay the total account balance, payment fee and possibly an additional deposit."

More Info

Late payment notice was read to the customer

Back
Real-Time Solutions

Real-Time Compliance

Real-Time Service Optimization

Real-Time Service-to-Sales
How Does It Work?

NICE Applications

- Employee Skills
- Feedback Scores
- Quality Scores
- Offline / Real-Time Speech

Real-Time Decisioning

Employee Desktop

NICE Applications

Real-Time Guidance

Process Automation

Desktop Application Analytics

Desktop Process Analytics
Real-Time Solutions

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Real-Time Service-to-Sales
Real-Time Service Optimization

**MONITOR:**
- Bottlenecks, best practices

**NAVIGATE:**
- On-screen guidance, complex processes

**AUTOMATE:**
- Routine tasks, error prone processes
Continuous Improvement for Service Optimization

Measure
effectiveness of the business rules applied

Identify
your process inefficiencies & best practices

Optimize
processes with guidance & automated flows for agents
Monitoring Agent Desktop Activities

Monitoring…

- Applications used and web sites accessed
- Tasks performed
- Idle time, screen lock time, log-in time
- Insights derived from out-of-the-box and custom reports

Used For…

- Identifying top/low performers
- Discovery of best practices
- Locating process bottlenecks and inefficiencies
- As an input feed to WFM for schedule adherence

- Increase efficiency
- Ensure process adherence of workers across the enterprise
Notepad Usage too high

No Notepad Usage, i.e. no documentation

Discovered PowerPoint was being used during processes to supplement training gaps

Duration in seconds
Application Analysis Report

Employees’ non-productive time = low utilization
Shaping Interactions with Real-Time Guidance

**Guidance...**

- **Real-Time**
- **Contextual and Dynamic**
- **Personalized**
- **Cross-Application**

**Used For...**

- New/complex processes
- Next-best-action
- Consistency
- Onboarding

- Improved Efficiency
- Customer Experience
Automating Processes for Optimizing Handle Time

**Automation…**

- **Real-Time**

- **On desktop or remote server**

- **Simulate any agent desktop activity**

**Used For…**

- Automation of routine tasks
- Customer data collected and consolidated in a single view
- Automates call summary notes

- **Handle time reduction**
- **Elimination of manual entry/process errors**
- **Reduced after call work**
Real-Time Solutions

- Real-Time Compliance
- Real-Time Service Optimization
- Real-Time Service-to-Sales
The Contact Center is the Most Exposed Link in the Compliance Chain

Customer service
On the front line!

Marketing
Communication

Finance
P&L Tracking

Business
Offering creation

Operations
Infrastructure Adaptation

Training
Education

The contact center is a compliance blind spot
“Time-to-Agent” Is Key

New regulations

Operational requirements

Scripts

You Need to Minimize it in Order to Reduce Risk
Real-Time Compliance

WHAT TO SAY:
- Scripts get agents to say what they need to say, when they need to say it

CAPTURE:
- Disclaimer & consent. That’s your evidence!
NICE Proactive Compliance Suite for Consumer Protection

Real-Time Compliance
- During the interaction
  - Context-Driven Agent Guidance
  - Capture & Manage Consent

100% Interaction Capture
- REC

Compliance Assurance
- After the interaction
  - Identify Exceptions
  - Manage Exceptions & Corrective Action

Capture & Manage Consent
Use Flexible Process Design Tools

- Define a policy enforcement flow for every regulatory case within an interaction
NICE Proactive Compliance Suite for Consumer Protection

- **Drive compliance**: Efficiently align and spearhead consumer compliance across the organization.
- **Prove compliance**: Easily compile evidence, supporting reports and documents.
- **Future ready**: Effortlessly roll out new regulations and policies enterprise-wide.
Real-Time Solutions

Real-Time Compliance

Real-Time Service Optimization

Real-Time Service-to-Sales
“Companies need to increase the productivity of their contact centers and boost customer revenues by determining the optimum time to present customer offers. One way to accomplish this is to use realtime information to guide agents through customer queries and push relevant information to the agent desktop.”

(Ovum, May 2012)
“Offering customers additional products or services in context of the support call not only drives incremental revenue, but when handled correctly, has no impact on customer satisfaction or can even raise customer satisfaction as customers feel they are receiving a more comprehensive solution.

(TSIA Research, May 2012)
Real-Time Service-to-Sales

**SENSE:**
- Interaction context

**DECIDE:**
- Next best offer

**GUIDE:**
Agent to perfect sales execution
Reconcile Differences to Improve Inbound Interactions

<table>
<thead>
<tr>
<th>Marketing Challenges</th>
<th>Contact Center Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Need to run consistent and effective Cross-Channel campaigns</td>
<td>Measured mainly on efficiency, CSAT</td>
</tr>
<tr>
<td>Need to utilize incoming customer interactions for marketing</td>
<td>Workforce is skilled for service</td>
</tr>
<tr>
<td>Doesn’t own the channels, have little influence on operations</td>
<td>Minimal access to marketing data from other channels</td>
</tr>
</tbody>
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NICE Approach to Successful Service-to-Sales Interactions

- Transition
- Reveal Context & Qualify
- Guided Dialog

- Select an Offer
- Next-Best-Offer

- Make an Offer
- Guided Selling

- Order Automation
- Interaction Analytics & Optimization

- Agent Performance & Incentive Management
## Return on Investment

<table>
<thead>
<tr>
<th>S2S Customers’ Results</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Pan-European Telco</td>
<td><strong>24% increase in conversion rate</strong></td>
</tr>
<tr>
<td>US Major Insurance</td>
<td><strong>$9M Annual Return</strong></td>
</tr>
<tr>
<td>Brazilian Telco</td>
<td><strong>$8.1M Annual Return</strong>*</td>
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</tbody>
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### Expected Impact on Sales KPIs

<table>
<thead>
<tr>
<th>KPI</th>
<th>Impact</th>
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<tbody>
<tr>
<td>Attempt Rate</td>
<td>+ 40-50%</td>
</tr>
<tr>
<td>Conversion Rate</td>
<td>+ 3-10%</td>
</tr>
<tr>
<td>Sales per Call</td>
<td>+ 7-15%</td>
</tr>
<tr>
<td>Avg $ / Sale</td>
<td>+ 5%</td>
</tr>
<tr>
<td>Retention Rate</td>
<td>+ 2-4%</td>
</tr>
</tbody>
</table>

* estimated
THANK YOU

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