EXECUTIVE BRIEF

Getting the Right Information at the Right Time, in the Right Way

By Cesar Fernandez, Director of Product Solutions

Today's business world is vastly different than it was just a few short years ago. Data rules, and the market is flooded with business intelligence and case management applications that serve up information to workers in a variety of ways. While presenting as much information as possible is good, presenting the right information at the right time is better. Businesses today feel pressure from customers, employees and competitors to become more social and collaborative. They need to connect on a different level than they have in past. Yet, even with the wealth of information available, critical gaps still exist between businesses and their customers.

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As a child, I remember going to the butcher shop and taking a number to wait our turn at the counter. The butcher would always greet my father by his first name. Actually, he called everyone by their first name. But, it didn't stop there. He seemed to remember every purchase every customer had ever made at his butcher shop. He knew their preferences, what they could and could not eat, what they liked or disliked about each purchase, what they paired with each purchase, and how each purchase was made. He knew his customers personally, and knew them well enough to be able to guide them to the right buying decision on that day. His brain contained a wealth of information, yet he always knew how to tap into the right information at precisely the right time.

Businesses in general could learn a great deal from my old family butcher. IT organizations could learn even more. In an ongoing effort to demonstrate their value to the business, IT organizations frequently find themselves focused on deploying technology, though in doing so, they can tend to lose sight of the underlying business needs. In turn, the business becomes inundated with a plethora of 'solutions' that generate a wealth of data. Consequently, it can sometimes be difficult to locate the applicable information needed to resolve a particular customer issue, or to steer someone to the desired product or outcome. In some cases, the information obtained (or even presented to worker) is incorrect for that particular situation. For example, as a satellite TV subscriber there have been times when I've called to get help with my receiver. The service representative, instead of focusing fully on resolving my problem, has tried to upsell me on my subscription package before fully addressing my issue. Why? Probably because the information displayed to the representative emphasizes a call to action of 'upsell' instead of 'resolve.'

As one would expect, instances like these will lead to frustration on the customer's part, perhaps choice words for the service representative, and, worse yet, potentially a lost customer. So how can situations like this be prevented? Here are a few common sense things to consider when implementing any workforce technology solution:

Orchestration and Integration – Let's face it, IT organizations love implementing technology. They love the latest and the greatest, especially powerful tools that deliver information quickly. Deep down, they want to care for their user base. However, in reality, by continuously bringing in the latest and greatest technology, they may be doing a disservice to their users. This practice leads to segregated data, resulting in functional silos that force users to go to various applications and systems in order to access the information they need. IT should focus on finding tools that integrate systems, aggregate data and facilitate orchestration across silos.

Ease of Use – How frustrating is it for a customer when they call a customer service center, only to have the service representative place them on hold so they can locate their account or other related information? Obviously, it's very frustrating. As such, it's important to ensure the tools provided to representatives are easy to use. Most users today are fairly web savvy and are comfortable searching the web for information. Make sure the application or system employees use to assist customers allows them to navigate to the data they need in a similar fashion. Most importantly, make sure that the right information is no more than a click or two away.

Informative but Uncluttered – Information is good. Too much information isn't. Ensure the tools provided to your users deliver the right information at the right time. In other words, only show the relevant information for the issue or question at hand. For example, if a customer is calling because their cable is out or their modem has stopped working, you don't need to display their subscription information to the representative. While this information might be nice to have, it will not help to resolve the problem. Instead, show information in logical groupings. In the troubleshooting call example above, the supporting IT tool should ideally focus on showing the customer's call history as well as any corresponding steps to resolution, including any actions taken by the customer. Also, the customer representative should have access to a knowledgebase of similar calls and the ability to log notes for the current call. Any other type of information would be secondary and should be accessible via a link or menu option as part of other grouped information.

Consistency – This is an often overlooked principle. Functionality should be consistent throughout the solution. Except for very rare occurrences, functionality of menus, buttons, links, widgets, etc., should remain consistent throughout the application. If a given menu options takes the user to a new window, then they all should. This also applies to syntax. Words and phrases should have the same meaning. For example, "Close" and "Exit" do not necessarily mean the same thing and should not be used interchangeably. Inconsistency can lead to confusion and/or incorrect information, thus causing delays and frustration for both the service representative and the customer.

Business intelligence and case management are more than just analytics and information. They're really processes that enable workers to make the right decisions based on the right information. Remember that information is good, the right information is better, but the right information at the right time delivered in the right way is the best.

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