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# WHITE PAPER Q&A

## DESKTOP VS. CRM

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# DESKTOP VS. CRM

## Q: What customer experience challenges do companies face today?

A: In an increasingly digital world, organizations face a growing number of challenges in handling customer interactions. Organizations must deliver high-quality responses and information that meet or exceed customer expectations, while not losing sight of the cost of handling these interactions.

Organizations also must strive to provide omnichannel, not merely multichannel, experiences. Specifically, customers should receive consistent responses and information no matter which touch point they engage through, whether assisted or digital, and whether with a front- or a back-

office employee. This is a challenge because organizations are increasingly using digital technologies such as mobile apps to handle simple interactions like account balance inquiries, freeing employees to handle more complex interactions such as completing a mortgage application or resolving a billing complaint.

In resolving these more complex interactions, employees often need to access data from multiple systems. CRM systems may contain a large portion of the required data, but agents will likely also need to access billing and other financial data, product or service information, records of past interactions, customer survey results, dashboards and customer analysis. Also, increasingly customers expect responses to be personalized and addressed within the context of previous interactions, again

requiring employees to access multiple systems.

Although increasing numbers of interactions are likely to start in digital channels, many customers will complete them using assisted service that involves engaging with an employee. For example, a customer may begin an insurance application in a digital channel but transfer to an agent or a business expert to complete the form. Organizations must make such



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transitions as seamless as possible, instantly transferring any already-entered data to the employee. Such processes are essential to making it easy for customers to engage with the organization and thus keeping customer effort scores as low as possible.

An analogous challenge exists where an employee is engaged with a customer in a digital channel – for example, an online chat session – but is required to commence another interaction with a different customer, potentially in another channel. In this situation, the employee is likely to have to have to access two customer records in the same CRM system simultaneously without losing track of either interaction.

## **Q: What challenges do employees face in handing customer interactions?**

**A:** As mentioned above, employees are very likely to continue having to handle interactions, either as a first point of contact or as the result of digital interactions being

transferred to them. This creates several operational challenges. Employees must log into different systems, decide which system houses the required information, and switch between systems to retrieve the data. Even if employees are able to access all the information in a single system, this information might be presented in several records on multiple pages of the system.

To meet operational targets as well as customer expectations, all employees handling interactions should follow established and specified best practices for handling each type of interaction. The alternative, employees left to their own devices, means they are likely to handle interactions in their own ways, which can produce inconsistent outcomes.

Customers increasingly expect their interactions to be resolved at the first point of engagement. They find it unsatisfactory to be transferred to another employee or met with statements such as “I will have someone get back to you.” Therefore, it is crucial that employees handling interactions have access to the information they need to resolve interactions, and have guidance regarding

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the next best action to meet customer expectations and business targets.

If an employee is not able to do this or is not empowered to resolve the interaction, it should be easy to collaborate with another employee who can help resolve the interaction. All employees handling interactions should do so in a prescribed way that satisfies any regulations that apply to the interaction and/or the industry.

## **Q: How can a smart desktop system help organizations overcome these challenges?**

A: Desktop systems can assist employees handling interactions in two ways: by unifying access and data entry and by automating more of the process. A unified desktop can support several key features, such as a single sign-on to all systems an employee is authorized to access to resolve interactions. Also, a desktop system can provide point-and-click access to any system needed to resolve interactions – for example, telephony support systems, email, social media, text-based

applications, business applications such as CRM, and dashboards and analysis to monitor performance and alerts. These systems can also provide a modified display of information so, for example, an employee does not have to access multiple pages to see or enter data, making it easier to see and enter data.

In combination, these capabilities can make interaction handling more efficient, reducing average handling times because agents don't have to spend as much time finding the information they need.

A smart desktop system also can analyze information accessed or entered to recommend or access information the employee needs next to continue handling the interaction rather than requiring the employee to search for it. In this way, the system can guide an employee through handling even the most complex interactions, and thus deliver the best outcomes. If an employee cannot resolve an interaction, such systems can make it easy for the employee to identify a work colleague who is available and has skills to help resolve the interaction.

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The most advanced systems can use artificial intelligence technologies to recognize the customer, the employee and the type of transaction and then guide the employee through the process of handling that type of interaction, identifying next best actions and upsell opportunities. Such systems can also use machine-learning techniques to automate repetitive tasks; for example, rather than forcing the employee to complete after-interaction data entry, the system can automate those tasks.

## **Q: What advantages does a smart desktop deliver compared to other applications?**

**A:** As noted, interaction handling has become more complex, primarily because of the number of channels and systems organizations have deployed. Unlike other systems such as CRM, a smart desktop can unify access to data in all systems, leaving each standalone application to continue managing data relating to the application (for example, CRM managing demographic, marketing, sales and service data).

Also, smart desktop systems can manage and, where applicable, automate interaction-handling processes that flow across multiple systems – for example, a billing inquiry that requires understanding the customer’s profile (CRM), the agreed service level (customer service), invoicing data (ERP) and refund policies (knowledge management). Using such systems thus can ensure all employees handling interactions, front- and back-office, follow best practices, provide the same information and personalize responses.

Using these systems can make interaction handling more efficient thanks to the lowering of interaction-handling times and more

effective due to improved business outcomes – for example, more interactions resolved at the first point of engagement.

With such systems in place, more employees will be equipped to handle interactions without extensive training, and each employee will be able to handle a greater range of interactions across multiple channels of engagement. This should improve agent satisfaction and, as a result, the customer experience because employees can focus on the customer and not what system they need to access to resolve the interaction.

Functionally, a smart desktop system sits above all other systems and so can hide the complexity both of those systems and of the organization’s overall systems architecture. In this way, it is unique in its ability to allow organizations to provide true omnichannel experiences without having to replace any other systems.

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