Contact Center Best Practices

The following Contact Center Best Practices were identified by the GSA Contact Center Center of Excellence while supporting Phase I of USDA's Contact Center Implementation

Table of Contents

Elements of Best in Class Contact Centers

Contact Center CoE identified nine elements of best-in-class contact centers that USDA may want to consider

Best-in-Class Element

Governance | Business Processes | Customer Experience

Technology | Workforce Optimization | Training and Workforce Development

Omni-Channel Features | Innovation | Change Management

Governance

Best-in-Class Element	Best-In-Class Feature	USDA's Use of Best-in-Class Feature

Governance

Technology

Omni-Channel Features

Business Processes

Workforce Optimization

Innovation

Customer Experience

Training & Workforce Development

Change Management

Best-In-Class Feature

- Oversight and leadership defined for people, process, technology and culture for improving the customer experience

- Oversight and leadership for contact centers in alignment with other delivery channels

- Data shared between channels to inform decisions

USDA's Use of Best-in-Class Feature

- Oversight and leadership for customer experience owned by the Office of Customer Experience

- Contact management, including the OneUSDA Contact Center and websites will be overseen by the Office of Customer Experience in collaboration with Office of Communications and Office of the Chief Information Officer

- Knowledge management will be owned by Office of Communications

- Technology will be overseen by OCIO (e.g., security, privacy)

Technology

Best-in-Class Element	✓ Best-In-Class Feature	USDA's Use of Best-in-Class Feature
Governance		
Technology		
Omni-Channel Features		
Business Processes		
Workforce Optimization		
Innovation		
Customer Experience		
Training & Workforce Development		
Change Management		

Best-In-Class Feature

- Omni-channel, secure, cloud-based Customer Engagement Center Communications Platform-as-a-Service (PaaS)
- Integrated knowledge base and CRM
- Customer journey analytics (Ability to collect analytics)
- Work-at-home agent technology
- Leverages data:
  - To inform customer strategy
  - To inform organizational/agency goals
  - To predict future needs
  - To inform other channels
  - To create intelligence

USDA's Use of Best-in-Class Feature

- Omni-channel
- Secure
- Cloud-based Customer Engagement Center Communications PaaS
- Integrated knowledge base and CRM
- Work-at-home agent technology required for incoming OneUSDA contact center
- System shall integrate with different functional applications such as document management, correspondence tracking, reporting tools, document imaging, CRMs, interactive voice response (IVR) systems, executive dashboards, Office of Communication's web publishing platform, and electronic forms

Omni-channel Features

Best-in-Class Element	✔ Best-In-Class Feature	USDA's Use of Best-in-Class Feature
Governance	• Calls, emails, social media, chats	• Calls, emails, social media, chats
Technology	• Intelligent IVR	• Intelligent IVR
Omni-Channel Features	• Virtual Customer Assistants	• Virtual Customer Assistants
Business Processes	• Click to chat, callback, calls, video chats	• Chat, callback, calls
Workforce Optimization	• ANI displays (callers number appears on the screen)	• ANI and answering request system
Innovation	• Co-browsing	• TTY/TDD
Customer Experience	• TTY/TDD	
Training & Workforce Development	• Secure email	
Change Management	• Secure authenticated accounts	

Business Processes

Best-in-Class Element	Best-In-Class Feature	USDA's Use of Best-in-Class Feature
Governance	• Continual lean process improvements • Agile business processes • Continuity of Operations	• Lean process improvements to be delivered through the Office of Customer Experience
Technology		• Integrate agile, CX and human centered design through a Phase II Customer Experience Digital Support Services
Omni-Channel Features		• Integrate the delivery of consistent information to the public through an enterprise-wide knowledge management system that integrates with a content management system and customer relationship management tool
Business Processes		
Workforce Optimization		
Innovation		
Customer Experience		
Training & Workforce Development		
Change Management		

Workforce Optimization

Best-in-Class Element	✔ Best-In-Class Feature	USDA's Use of Best-in-Class Feature
Governance	• Leverages flexible work strategies such as virtual agents to account for peak and off-peak times and surge requirements • Virtual agent strategy	• Virtual agents and flexible work schedules to account for peak and off-peak times/surge requirements • Virtual agent strategy
Technology		
Omni-Channel Features		
Business Processes		
Workforce Optimization		
Innovation		
Customer Experience		
Training & Workforce Development		
Change Management		

Innovation

Best-in-Class Element	Best-In-Class Feature	USDA's Use of Best-in-Class Feature
Governance	• Ongoing innovation in technology, process improvements or economies of scale to improve customer experience without sacrificing quality	• Ongoing innovation in technology, process improvements or economies of scale to improve customer experience without sacrificing quality
Technology		
Omni-Channel Features	• Demonstrate cost reduction year over year and quality improvement	• Emerging technologies requested
Business Processes	• Implements emerging technologies	• Pilots and "test and learn" initiatives
Workforce Optimization	• Pilots and use of agile processes (minimally viable products)	
Innovation		
Customer Experience		
Training & Workforce Development		
Change Management		

Customer Experience

Best-in-Class Element	✓ Best-In-Class Feature	USDA's Use of Best-in-Class Feature
Governance		
Technology		
Omni-Channel Features		
Business Processes		
Workforce Optimization		
Innovation		
Customer Experience		
Training & Workforce Development		
Change Management		

Best-In-Class Feature

- Alignment of contact center's goals with the customer goals
- Leverages data from all sources to improve overall CX
- Leverages human-centered design techniques
- Integrates contact center with other delivery channels
- Hires for attitude and trains for skill
- Secure and private personalization of transactions
- Resolves inquiry at the first resolution (first call resolution)
- Engaged workforce committed to the mission of the center
- Leverages channel of choice
- Bi-lingual
- Section 508 Compliant

USDA's Use of Best-in-Class Feature

- Phone, email, postal, chat, call back (no co-browsing)
- Bi-lingual (10%)
- Americans with Disability Act (ADA) Section 508 Compliant

Training and Workforce Development

Best-in-Class Element	✓ Best-In-Class Feature	USDA's Use of Best-in-Class Feature
Governance	• Curriculum development for new and experienced agents	• Hard and soft skill training
Technology	• Soft skill training (agent behavior, customer service, defined success for training)	
Omni-Channel Features	• Screening for language skills and clearance	
Business Processes	• Career path for leadership development	
Workforce Optimization	• Clearly defined competencies	
Innovation		
Customer Experience		
Training & Workforce Development		
Change Management		

Change Management

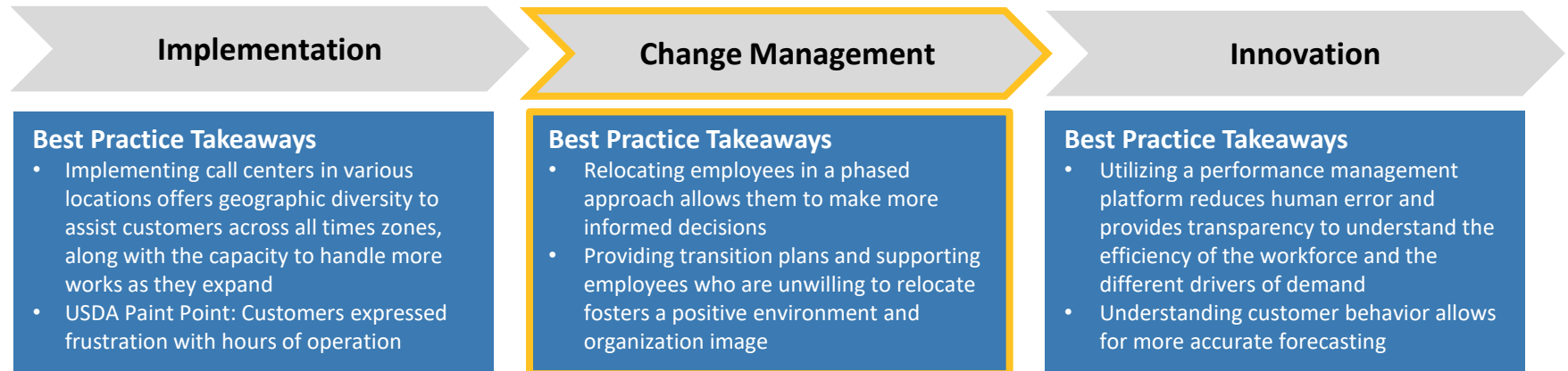| Best-in-Class Element	✓ Best-In-Class Feature	USDA USDA's Use of Best-in-Class Feature
Governance		
Technology	• Assesses the impact (e.g., business processes and specific jobs) of contact center changes on the workforce within the center, on other contact centers and on the customer	• Change management requirement included
Omni-Channel Features		• Shift left philosophy
Business Processes	• Assesses the impact of changes to policies that impact customers and will result in a surge in calls.	
Workforce Optimization	• Cultural change within the agency (bring in someone who operates in change management, conditioning people to train them)	
Innovation		
Customer Experience	• "Shift-left" philosophy	
Training & Workforce Development		
Change Management		

Contact Center Transformation Case Studies

Case Study: Barclays Consolidation of Contact Centers

BARCLAYS

Background: In 2017, Barclaycard US won the Best In Class Contact Center Award for the over 200 seats category. They currently operate 3 call centers in Maine, Nevada, and Ohio.

Implementation	Change Management	Innovation

Best Practice Takeaways
- Implementing call centers in various locations offers geographic diversity to assist customers across all times zones, along with the capacity to handle more works as they expand
- USDA Paint Point: Customers expressed frustration with hours of operation

Best Practice Takeaways
- Relocating employees in a phased approach allows them to make more informed decisions
- Providing transition plans and supporting employees who are unwilling to relocate fosters a positive environment and organization image

Best Practice Takeaways
- Utilizing a performance management platform reduces human error and provides transparency to understand the efficiency of the workforce and the different drivers of demand
- Understanding customer behavior allows for more accurate forecasting

Barclays' Transformation Highlights

- Opened new, larger U.S. customer call centers over the past few years
- Launched a new call center in Wilton, ME, in 2015 (in addition to NV and OH)
  - Maine's Quality Centers program provided 5 week customized training services to new employees

- Closed its Ogletown, DE call center in April 2017 and **relocated 300 employees over 8 month period**
- Provided a **transition package for employees** that didn't want to relocate – included severance, external and internal job fair invites, training seminars on resume writing and interview skills

- Moved from being primarily Excel based to the **Anaplan tool**
  - Anaplan platform allowed Barclays to revolutionize their planning processes for contact center environments and **streamline existing processes**

Barclays employed a methodical, phased change management approach to transition their workforce to operate in a new, customer focused environment

Case Study: UPMC Health Plan Optimization of Contact Centers

Background: UPMC Health Plan is the second-largest health insurer in western Pennsylvania that won the *Best In Class Contact Center Award* for the over 200 seats category in 2016. The company boasts a "top-down" commitment to customer experience, which differentiates them in the healthcare insurance space.

Innovation	Performance Management	Omni Channel

Best Practice Takeaways
- Optimizing behind-the scenes processes and providing back office with a real-time view of what the team is working on allows them to make better decisions about resource allocation, avoiding problems related to work distribution that could affect service

Best Practice Takeaways
- Tracking performance on a weekly basis allows for leadership to efficiently make any changes or improvements where needed, as well as effectively allocate and train resources

Best Practice Takeaways
- Utilizing multiple channels increases efficiency by servicing different customer segments and allowing for flexible routing strategies

UPMC Health Plan's Transformation Highlights
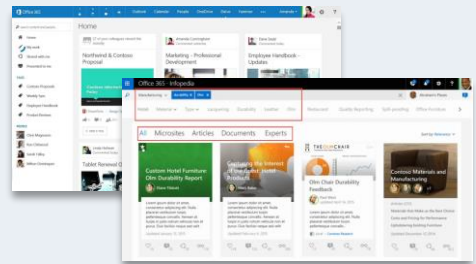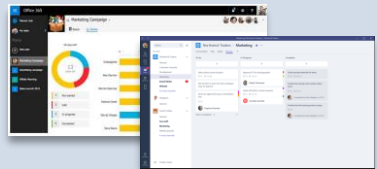
- Moved from manual data extraction and spreadsheets, to the Genesys Customer Experience Platform
  - Routes work to the enrollment team based on skills and priorities, ultimately **getting the item to the right person the first time around**
- Extended the Genesys Customer Experience Platform to the back office

- **Tracks** the **number of transfers made**, **how many recommendations and referrals** to case managers were made, **how many appointments** the concierges have scheduled, and who the **top performers** are

- **Multi-Channel Satisfaction: 96%**
  - 240+ representatives **at 6 different call centers** provide omnichannel support through inbound and outbound phone, chat, email, and a personalized concierge
- **First Contact Resolution: 96%** ↑
- **Customer Satisfaction with chat: 93%**
- **Issue resolution: 20-30 minutes**

UPMC Health Plan leveraged call center technology that provided real-time data analytics, to allow them to better track metrics and increase multi-channel customer satisfaction

Case Study: Microsoft's Contact Center Knowledge Management

Microsoft leverages Office 365 tools such as SharePoint, Delve, Planner, and their KM portal InfoPedia to better track, store, and plan for efficient knowledge management

Capability	Best Practice Takeaways	How Microsoft Leverages	Product Samples
Tracking	• Tracking where information is stored allows for employees to more easily find and share pertinent knowledge	• Delve is a cloud-based service that grabs information from multiple places to populate profiles, which provides insight into what everyone is working on	
Storing	• Storing organizational knowledge in an easy to access manner allows employees to leverage existing information and avoid inefficient rework	• Delve introduced Boards, which allows a user to find content and tag it (add it to a Board) – Collects information or knowledge, and provides a simple way to organize it • InfoPedia provides a one-stop-shop for organizational knowledge, allowing for user customization with Articles, Microsites, Documents, and People	
Planning	• Leveraging planning tools to pull analytics allows organizations to assess how many and what variety of asks employees have dealt with over a specified amount of time	• Planner brings teams together to plan common workloads and ensure tasks are done more efficiently	

An efficient, evolving organization needs to be able to easily create and store content, share this knowledge, and have others be able to easily access it anytime and anywhere

Deep Dive: Center for Disease Control (CDC) Contact Center Consolidation Roadmap

CDC Contact Center Consolidation: Background and Scope

Background	Scope

Background

- Prior to 2012, the **CDC had 23 programs** (e.g., National Center for HIV, STD, and TB Prevention; National Immunization Program; National Center for Chronic Disease Prevention and Health Promotion, etc.) that **administered 40 separate contact centers answering questions taken from over 75 separate 1-800 numbers**
  - These services included not only the 40 separate call centers to answer phone inquiries, but also **63 separate web sites for online inquiries, and separate email and US Postal Mail inquiries**
  - This decentralized approach resulted in a **fragmented and frustrating user experience for constituents**
- The new CDC Director created an **integrated "one face to the public"** vision for CDC based on a single 1-800-CDC-INFO phone number and web site

Scope

- The underlying principle is to **enhance the citizen experience in obtaining health information anytime, anywhere, any way,** through professional services that accommodate cultural and language diversity and persons with disabilities.
  - Underpinning the new consolidated digital, voice, and mail communication system was a **knowledgebase constructed to allow for a standardized delivery of health information**
- **Channel Consolidation** (note that in 2012 they did not move to chat or social media)
  - Public inquiries are received from phone, web, email, and postal mail
  - Centralized Entry Points established– one for phone/one for web site
  - US Mail
  - Email

The overall objective is to ensure consistent, timely, reliable health information is disseminated to a variety of consumers (public, health professionals, researchers, etc.) and dynamic, shifting public health priorities

CDC Contact Center Consolidation: Primary Goals

The 5 primary goals of the CDC are around increasing customer satisfaction, consolidating 800 numbers, and reducing the service budget line

1 Enable constituents to obtain information through channels of their choice and continually improve customer service (stay at forefront of market)

2 Achieve customer satisfaction scores (CSAT) of 90% or higher

3 Consolidate all state 1-800 numbers into new national information center. Consolidate supporting web sites into one central site.

4 Reduce CDC wide customer service budget line by 15% to 20%

5 Complete the establishment and migration of new CDC-INFO contact center and web site within 24 months.

CDC Contact Center Consolidation: Roadmap Components

① Discovery	② Planning	③ Build	④ Migration of Contact Centers	⑤ Operate & Evolve
• Landscape Analysis • Stakeholder Interviews • Constituent Journey Mapping & Insights • Conduct Taxonomy / Audit • Technology Assessment	• Concept of Operation • Iterative Planning with Stakeholders • Feature Prioritization • Migration Planning • Definitions in Quality Measurement Process / Metrics • Technology Needs & Designs	• Standard Operating Procedures • Resourcing • Knowledge Management System • Training Program • Technology Build • System Testing and User Testing • Reporting & Analytics Design	• Standardized Transition Process • Timeline	• Measurement Feedback • Adjustments as Necessary and Continuous Improvement

CDC collaborated iteratively with stakeholders to select the CONOPS option to move all contact centers to a single site contact center operated by a contractor

CDC Contact Center Consolidation: Roadmap Components

| 1. Discovery | 2. Planning | 3. Build | 4. Migration of Contact Centers | 5. Operate and Evolve |

1 **Landscape Analysis**
- Undertake inventory of all contact centers, web sites, knowledge data bases
- Analyze and understand and prioritize information most frequently requested and/or critical in nature
- Create risk register of potential items that could derail or slow progress of project

2 **Stakeholder Interviews**
- Begin with larger and less complex contact centers/web sites and then move progressively to the most complicated
- Identify key operating characteristics of each center, and key characteristics of interactions with constituents for each center. Metrics.
- Determine strengths and weaknesses
- Determine peak periods for contacts and surge requirements

3 **Constituent Journey Mapping & Insights**
- Working with stakeholders to pull samples of various population segments – 10 segments identified
- Undertake phone call journey mapping for each segment – 200 calls undertaken
- Design desired journey based on analysis

4 **Conduct Taxonomy Audit**
- Establish Unified Content Framework
- The framework allowed for the categorization of the content and a mapping back to the responsible program
- Develop Unified Content Template
- Templates with defined sections including keywords, basic content, references, etc. provided inquirers with better formatted answers
- Import/Transform Content into Template/Framework
- Developed ongoing processes to provide continual updates to KM

5 **Technology Assessment**
- Technical Needs & Desired Features

CDC conducted a current state assessment of the CDC's contact centers, web sites, and knowledge bases to identify the existing landscape and develop journey maps for each segment

CDC Contact Center Consolidation: Roadmap Components

1. Discovery	2. Planning	3. Build	4. Migration of Contact Centers	5. Operate and Evolve

1 **Concept of Operation**
1. Move all contact centers to a single site contact center
   a) Operated by CDC
   b) **Operated by a contractor** (Executive Project Committee Selection this option based on information collected in Discovery)
2. Manage existing CDC sites with through intelligent routing and through a single vendor platform
3. Consolidate into a few contact centers that consolidated information on "disease categories" – managed through intelligent routing and single vendor system

2 **Iterative Planning with Stakeholders**
- Skill based Call routing strategy established to route calls
- Hours of operation established to support all programs
- IVR configured to provide automated answers to the 200 top asked questions during off hours. Also listed top FAQs on web site
- Added the new consolidated email address information
- Established email forwarding process to route incoming email to consolidated email account

3 **Feature Prioritization**
- Based on customer journey feedback, interviews, and funding, telephony and web-based features were identified as "must have" and "desirable" and "future"

4 **Migration Planning**
- Overall time and sequence of contact center and web site migration undertaken based on complexity and avoiding peak periods for each center

5 **Definitions in Quality Measurement Process/Metrics**
- Executive Project Committee sign off on a single set of metrics for the single

6 **Technology Needs & Design**
- CIO team and contractor developed an architectural approach and technology stack for deployment

CDC collaborated iteratively with stakeholders to select the CONOPS operated by a contractor, prioritize features, identify a plan for migration, and establish the technology needed for deployment

CDC Contact Center Consolidation: Roadmap Components

1. Discovery	2. Planning	3. Build	4. Migration of Contact Centers	5. Operate and Evolve

1 Standard Operating Procedures
- Developed comprehensive set of standard operation procedures for new contact center that was signed off by Executive Project Committee

2 Resourcing
- Interactive Voice Response (IVR) initially used to direct calls during business hours. During off hours, the IVR provided information on the 200 most frequently asked questions. Back in 2012, CDC wanted constituents to get a human during business hours
- Contractor created sophisticated forecast models of consolidated volume, new estimated handle times, and queuing assumptions based on new skills based routing algorithms. From these forecasts, contractor-built workforce management schedules

3 Knowledge Management System
- Knowledge management (KM) system was created and populated – part of the Siebel CRM system. Critical that KM is integrated with CRM

4 Training Program
- Built training program using new knowledge based articles. Agents received "soft skills training" – designed by contractor and approved by EPC

5 Technology Build
- Contractor responsible for building technology stack to meet statements of tech objectives, security requirements, and approved tech products
- CIO shop oversaw build and ATO process

6 System Testing and User Testing
- Contractor performed system testing
- Contractor contact center agents conducted user testing

7 Reporting & Analytics Design
- Contractor built reporting system per requirements approved by the Executive Project Committee
- CDC executives and agency heads all receive weekly and monthly reports

CDC conducted an audit on each contact center's knowledge management system, looking at how each was structured and the metadata used to search, and ultimately created a new KM system with Siebel

CDC Contact Center Consolidation: Roadmap Components

1. Discovery	2. Planning	3. Build	4. Migration of Contact Centers	5. Operate and Evolve

1 **Standardized Transition Process**
- Contractor designed standard transition process
- PMO activities
- Operations activities
- Desk Top/IVR/Develop Test Routing Strategies

2 **Timeline**
- Contact Centers were converted over 18 month period

CDC developed a standardized transition process to ensure smooth conversion of contact centers over an 18 month period

CDC Contact Center Consolidation: Roadmap Components

1. Discovery	2. Planning	3. Build	4. Migration of Contact Centers	5. Operate and Evolve
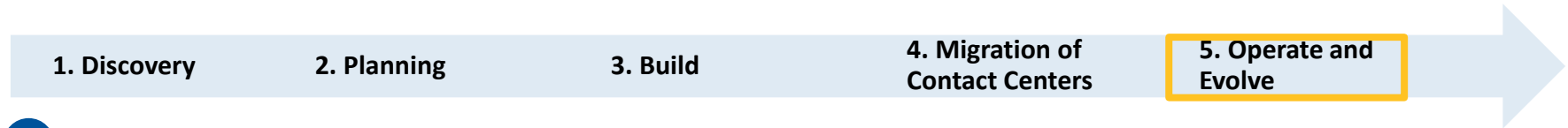
1 Measurement feedback

2 Adjustments as necessary

3 Continuous Improvement

The migration of contact centers was an iterative process, with adjustments and continuous improvements being made as they operated and evolved

Knowledge Management Best Practices and Case Studies

When implementing a customer service-focused KM system, six industry best practices may be considered

Pain-points for USDA

Customer Service Knowledge Management Best Practices

1 **Evaluate and diagnose internal needs**

- Perform **assessment of current state of knowledge management documentation and protocols** – diagnose pain-points and identify a KM system that best fits company needs (e.g., Oracle, Bloomfire, etc.)

2 Identify knowledge owners throughout the organization

- Establish **a system of accountability by allocating subject matter responsibilities to specific employees** who are then in charge of keeping those subjects up to date in the knowledge base

3 **Create a centralized internal knowledge base**

- Establish an internal knowledge base to **increase access of information between employees and departments, while reducing costs** by allowing employees to focus on other items than repeat research

4 **Develop a plan for maintenance and continuous improvement**

- When an issue is resolved, **document the article so that the resolution is readily available** – if changes are made to an existing resolution make sure there is a protocol to update and share

5 Share knowledge with the customer

- Use an external knowledge base, (e.g., Ask Karen), to **share information with the public** in order to decrease incoming requests and increase efficiency with support agents

6 Turn reactive customer service into proactive customer service

- **Keep track of customer metrics and analyze complaint trends** in order to tackle issues before for they expand to a larger concern – supply resolution information to public across all channels

---

Knowledge Management Statistics – Customer Service

Customer Behavior

- **84% of customers are frustrated** when dealing with non-knowledgeable agents[1]
- 91% of those who are unsatisfied with customer service leave without voicing their grief[1]
- It's **6x more expensive to attract new customers** than to spend on retention[2]
- Over 90% of respondents said they would use a knowledge base if it were available to them[3]

Cost and Efficiency Metrics

- Organizations with proper knowledge management processes in place **can reduce overall support costs by 25 percent**[4]
- Improving internal collaboration and communication can **increase productivity from 25-35% by eliminating the amount of research time needed**[5]

*"Part of an effective KM strategy involves enabling customers to **access the knowledge base and proactively solve their issues, rather** than [focusing on a solution that just] saves costs"* – CEO, TEAMSUPPORT[7]

USDA's implementation of a consolidated knowledge management system has potential to substantially reduce operating costs and increase support efficiency

The Knowledge Management sector is an ill-defined industry, however, five players emerge as market leaders

Competitor	Description	Pros	Cons
salesforce community cloud	• **Platforms:** web-based, iPhone, Android, Windows Phone • **Key features:** communication management, custom branding, search functionality	• Product is highly customizable • Reports can be generated to excel easily and quickly	• 3rd party integrations are limited • Information is difficult to segment into internal and external channels
ORACLE SERVICE CLOUD	• **Platforms:** web-based, iPhone, Android • **Key features:** search functionality, API, 3rd party integration, activity dashboard, custom branding • **Key integrations:** Outlook, TeammSupport, ChaseData, Dell Boomi	• Reports are very detailed • Internal help community supplies large amount of documentation	• Many features require training, such as report analytics • Interface is not modern
Bloomfire	• **Platforms:** web-based, iPhone • **Key features:** search functionality, API, 3rd party integrations, activity dashboard • **Key integrations:** Dropbox, Google Drive, Zendesk, Slack	• Interface is clean and simple • Platform easily integrates with other tools	• Certain "basic" functionality (e.g., text formatting) is missing • Platform is expensive
GURU	• **Platforms:** web-based • **Key features:** search functionality, API, 3rd party integrations, activity dashboard • **Key integrations:** Slack, Zendesk, Outlook	• Browser extension add-on enables easy access to frequently used links • Slack pairs well with Guru	• Web-based UI is not as intuitive compared to other competitors • Platform still has minor bugs
Confluence	• **Platforms:** web-based, iPhone, Android, desktop • **Key features:** search functionality, API, 3rd party integrations, activity dashboard, communication management, document storage, custom branding • **Key integrations:** Outlook, SharePoint, Trello	• Platform offers visual tools for organization (gliffy diagrams, code blocks, etc.) • Documentation is easy to update in real-time	• Certain webpages are not easily customizable • Site templates cannot be reused

While Salesforce and Oracle may be the obvious KM solutions for larger organizations, many new and compelling competitors have entered the market

HomeAway's adoption of KM system, Bloomfire, has helped shorten call resolution time by an est. 40%

HomeAway

Background: HomeAway is a world leader in online vacation rentals that offers rental management software for professional property managers

Situation and Pain Points
- HomeAway's **knowledge base was separated throughout multiple tools** – support documents were housed in **Skype** and **Google Apps**, and FAQ material lived in **individual computers** or in the **minds of employees**
- **Onboarding new employees was time consuming** and difficult to manage
- Company **knowledge was lost** when employees left the company since much of the information was never documented
- **Support call resolution times were long**, and support solutions often differed between employees since there was no consistent repository of information

Google apps

Support Document Repository

FAQ Material
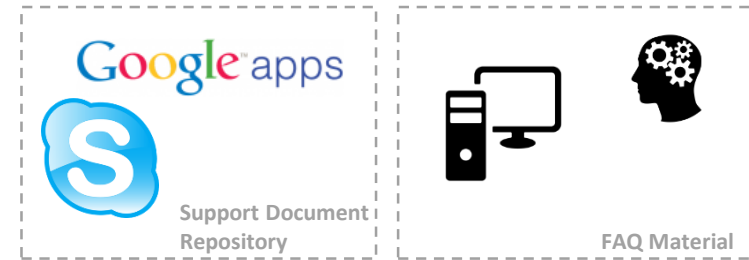
Disjointed Information Structure

Adoption of New Knowledge Management Tool
- HomeAway became acutely aware of their KM issues, and the **cost of lost knowledge associated with employee turnover**
- Multiple KM solutions were explored, and ultimately, Bloomfire was selected because of its **ease of use, ability to upload any file type, powerful Q&A engine, and robust analytics** – components that bode well for customer support needs

Easy to use   **Upload any file type**   **Powerful Q&A**   **Robust Analytics**

Selection Rationale

Outcome
- Because of Bloomfire's ease of use, **HomeAway experienced 100% adoption within three days** of introducing the platform to the team
- The onboarding process has become shortened by an estimated 50%, and call resolution times are have been shortened by an estimated 40%
- Reporting methods make it easier to **hold employees accountable and ensure the experts are answering the right inquires**

Bloomfire

- **One repository**
- **Onboarding efficiency**
- **Faster call resolution**
- **Knowledge retention**

HomeAway's adoption of Bloomfire translated into faster call resolution times, and a shorter onboarding timeline for new hires

Wrike's integration of Guru has increased KM efficiency, while minimizing employee behavior change

Background: Wrike is a work management and collaboration platform used by high-performance teams everywhere

Situation and Pain Points
- Wrike was **using their own software internally as a knowledge base**, however, managing the content and keeping it up-to-date was a challenge
- The sales team had to use a demo account and a personal account to balance their sales demos and their internal workflow – as a result, **documentation was disjointed**
- **While Slack was used to alleviate some of the issues** by providing a "watercooler" channel where employees could ask internal questions, this was not scalable

Sales Team Communication

Internally Developed Database

Low Ease of Use Knowledge Base

Adoption of New Knowledge Management Tool
- Wrike was focused on two key objectives to improving their situation:
  - Keep their sales/support teams **in one, single workflow system** to reduce information search time
  - Provide a **solution that was visually appealing** to help combat resistance to change
- Guru was selected because it allowed for integration with Slack (along with other tools), **thus mitigating the need for internal employee behavioral change**

Single Workflow System

Visually Appealing

Desired Solution Elements

Outcome
- Guru's many integration capabilities, such as its Chrome extension, **make knowledge base updates easy**, resulting in high internal adoption rates at Wrike
- Relevant conversations in Slack can now be **tagged, by any employee in the conversation, and automatically stored in the Guru knowledge base**
- Customer support and sales operations have increased dramatically, with an estimated 60% reduction in first time response time, and 30% reduction in repeat questions in Slack

- **Slack integration with Guru**
- **Internal dialogue continued through Slack**
- **Ease of documentation through Guru**

Guru's ability to integrate with Slack, a collaboration tool already used by Wrike, has helped ensure their change management approach is successful

Customer Experience Office Case Studies

VA Case Study: Veterans Experience Office (VEO)

Background

- Veterans Experience Office (VEO) was established in 2015 to address reports of negligence and mismanagement[1]
- Key pain points included long wait times for medical care, poor customer service, and disorganized record management

Approach

- Collaborated with GSA and leading commercial customer experience offices (e.g., Starbucks, Marriott, and Walgreens) to identify and apply best practices
- Conducted customer journey mapping through interviews with hundreds of veterans and their families
- Organized lean six sigma trainings focusing on improving employee ownership over individual veteran experiences
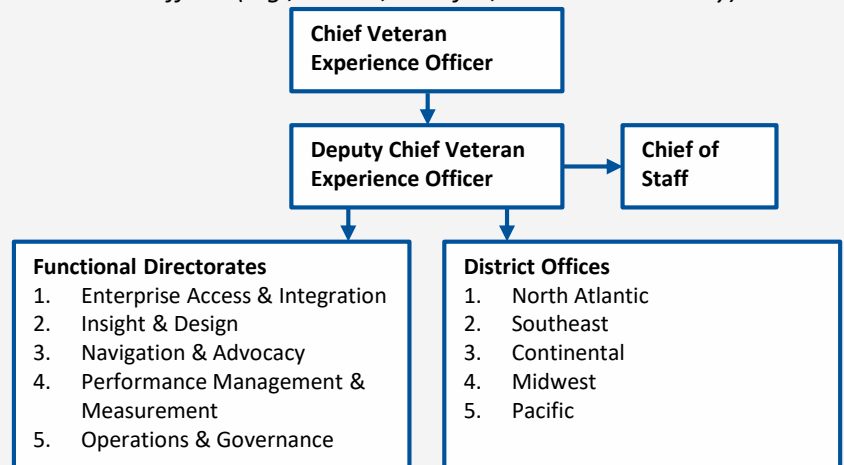
Outcomes

- Created Vets.gov as a single online resource for addressing Veteran needs by consolidating over 500 websites
- Launched MyVA311 24/7 call line as the sole phone number for connecting with the VA
- Established veteran customer experience KPIs (e.g., survey responses to: "I got the service I needed," "It was easy to get the service I needed," and "I felt like a valued customer")
- Founded over 90 Community Veteran Engagement Boards around the country to foster collaboration between the VA and other veteran service and advocacy organizations

VEO Overview	
Chief Customer Officer	Dr. Lynda Davis (2017 – Present) Tom Allin (2015 – 2017)
Customers	Veterans; Veteran Families
Major Functions	• Conduct / publish research on veteran experience • Deliver multi-channel communications tools • Build veterans experience products to improve the patient and benefit experience • Facilitate coordination of local veterans services

Organization Structure[2]

VEO is a distinct cross-functional department, enabling it to work with all VA offices (e.g., Health, Benefits, National Cemetary)

Chief Veteran Experience Officer

Deputy Chief Veteran Experience Officer → Chief of Staff

Functional Directorates
1. Enterprise Access & Integration
2. Insight & Design
3. Navigation & Advocacy
4. Performance Management & Measurement
5. Operations & Governance

District Offices
1. North Atlantic
2. Southeast
3. Continental
4. Midwest
5. Pacific

General Services Administration (GSA) Office of Customer Experience (OCE) Overview

OCE Overview

Chief Customer Officer	Anahita Reilly
Customers	Federal Agencies, Suppliers, Citizens
Major Functions	• Build HCD / CX Capacity Across GSA • Lead Agency Reform Initiative on Data-Driven Customer Engagement • Establish Enterprise-Wide CRM Governance • Mature GSA Voice-of-the-Customer Program • Establish CX Awards Program Across GSA Support CX Cap Goal

OCE KPIs

- % of surveys with action plans tied to feedback
- % of external surveys using GSA survey platform
- Recommendations that improve FAS Customer Loyalty Survey (CLS) results
- Customer-driven dashboard for data sharing
- OCE is acting in GSA's best interest (IPSS)
- Rating of OCE's performance in serving business needs (IPSS))
- Customer Experience Research certifications

Organization Structure

Total FTEs: 5

Chief Customer Officer
- Customer Experience Strategist (2)
- ELP Program Analyst (2)

"A CCO needs to have strong interpersonal skills to be able to influence decision making where they might not have formal authority. They should be well-versed in change management, as well as have a propensity for data to be able to find the right balance between evidence and intuition"

— GSA, OFFICE OF CUSTOMER EXPERIENCE

Federal Student Aid (FSA) Case Study: Chief Customer Officer (CCO)

Background

- FSA established the first Chief Customer Officer (CCO) in the federal government in 2010
- Main goal was to create an integrated student experience
- Key initiatives included improving the application and repayment experience within the fund dispersal process

Approach

- Reshaped FSA's culture toward a more customer-centric view, using private sector best practices
- Mapped the entire process across two major customer journeys to identify opportunities to simplify and streamline the digital experience
- Set metrics and targets such as increase in number of total applications, and reduction of default rates, as top line customer experience measures
- Leveraged digital platform and call center data analytics to better understand customer needs, and ultimately segmented this data for deeper insights
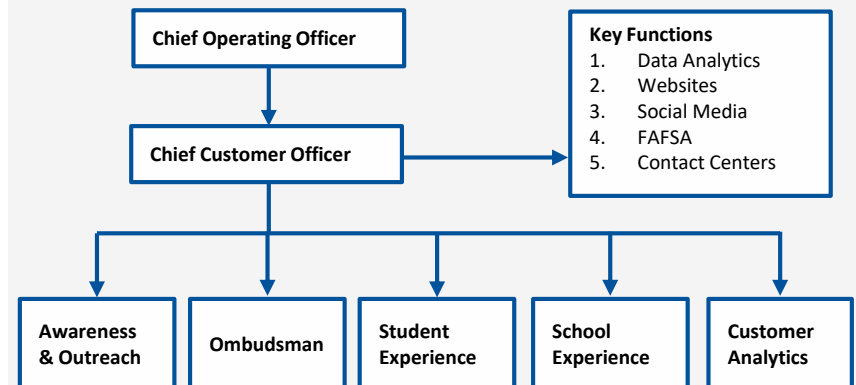
Outcomes

- Consolidated 6 websites into Studentaid.gov, the flagship site for FSA
- Launched a social media strategy leveraging "office hours" on Twitter to better understand customers and respond to questions in real time[1]
- Created a clear link between customer experience and the goals of the broader organization by increasing transparency and working closely with executive leadership

CCO Overview	
Chief Customer Officer	Chris Greene (2017 – Present) Brenda Wensil (2010 – 2017)
Customers	Students, Parents, Educational Institutions, Banks
Major Functions	• Have direct accountability over the front-end process from application to central processing • Deliver centralized communications tools • Prioritize spending and setting strategy with the operating committee

Organization Structure

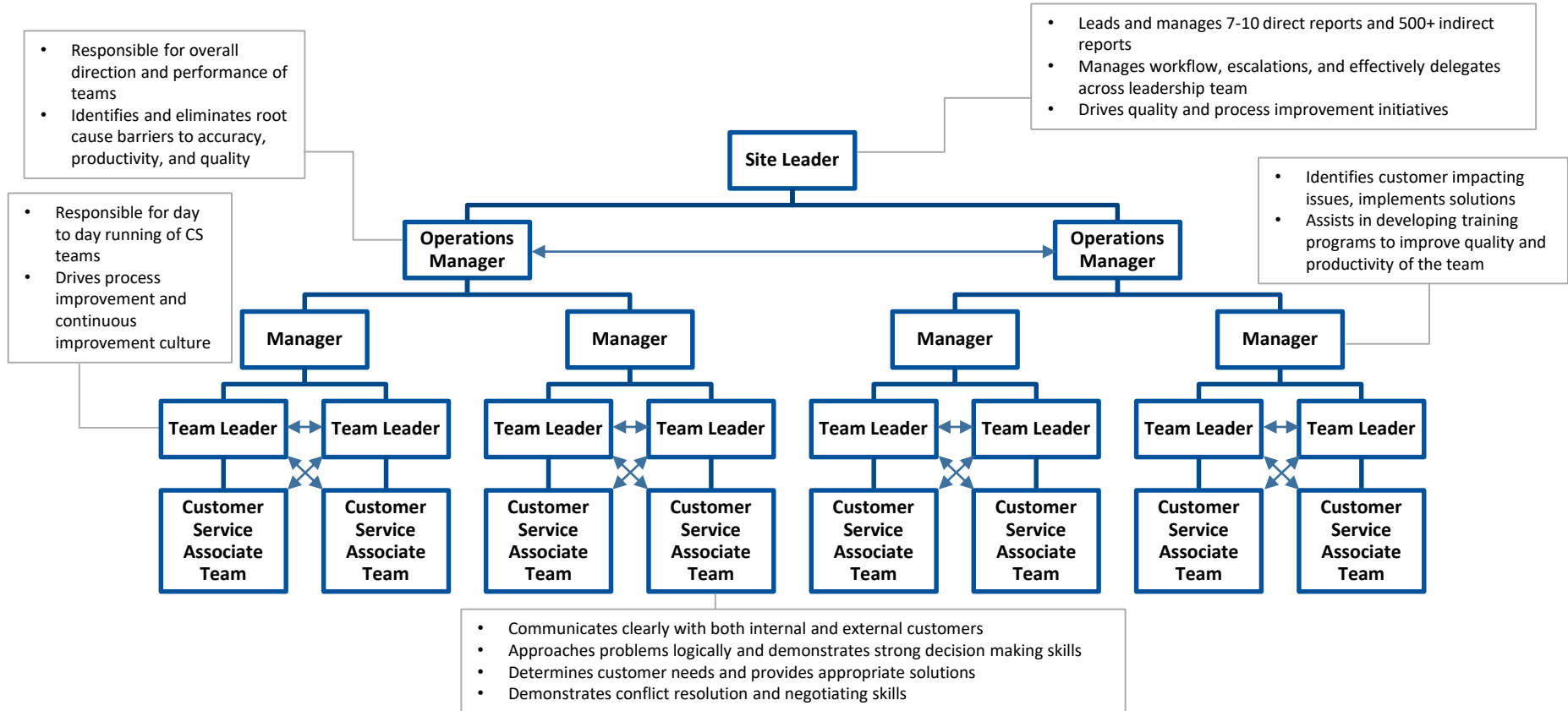*CCO reports to the Chief Operating Officer (COO), working closely with the Chief Financial Officer (CFO) and operating committee to oversee all customer-facing functions*

Key Functions
1. Data Analytics
2. Websites
3. Social Media
4. FAFSA
5. Contact Centers

Chief Operating Officer → Chief Customer Officer → Awareness & Outreach | Ombudsman | Student Experience | School Experience | Customer Analytics

Amazon Case Study: Customer Service (CS) Center

Organization Structure

Operations managers work with each other as comprehensive team leaders. Team leaders interact with other customer service associates as well as each other in their team grouping.

- Leads and manages 7-10 direct reports and 500+ indirect reports
- Manages workflow, escalations, and effectively delegates across leadership team
- Drives quality and process improvement initiatives

- Responsible for overall direction and performance of teams
- Identifies and eliminates root cause barriers to accuracy, productivity, and quality

- Responsible for day to day running of CS teams
- Drives process improvement and continuous improvement culture

- Identifies customer impacting issues, implements solutions
- Assists in developing training programs to improve quality and productivity of the team

Site Leader

Operations Manager ⟷ **Operations Manager**

Manager | **Manager** | **Manager** | **Manager**

Team Leader ⟷ **Team Leader** | **Team Leader** ⟷ **Team Leader** | **Team Leader** ⟷ **Team Leader** | **Team Leader** ⟷ **Team Leader**

Customer Service Associate Team (×8)

- Communicates clearly with both internal and external customers
- Approaches problems logically and demonstrates strong decision making skills
- Determines customer needs and provides appropriate solutions
- Demonstrates conflict resolution and negotiating skills

Cross-hierarchical structure of customer service centers facilitates culture of collaboration and sharing of best practices