Intelligently Routing Service Requests

A customer service sophistication model

PART 2

Microsoft Dynamics 365
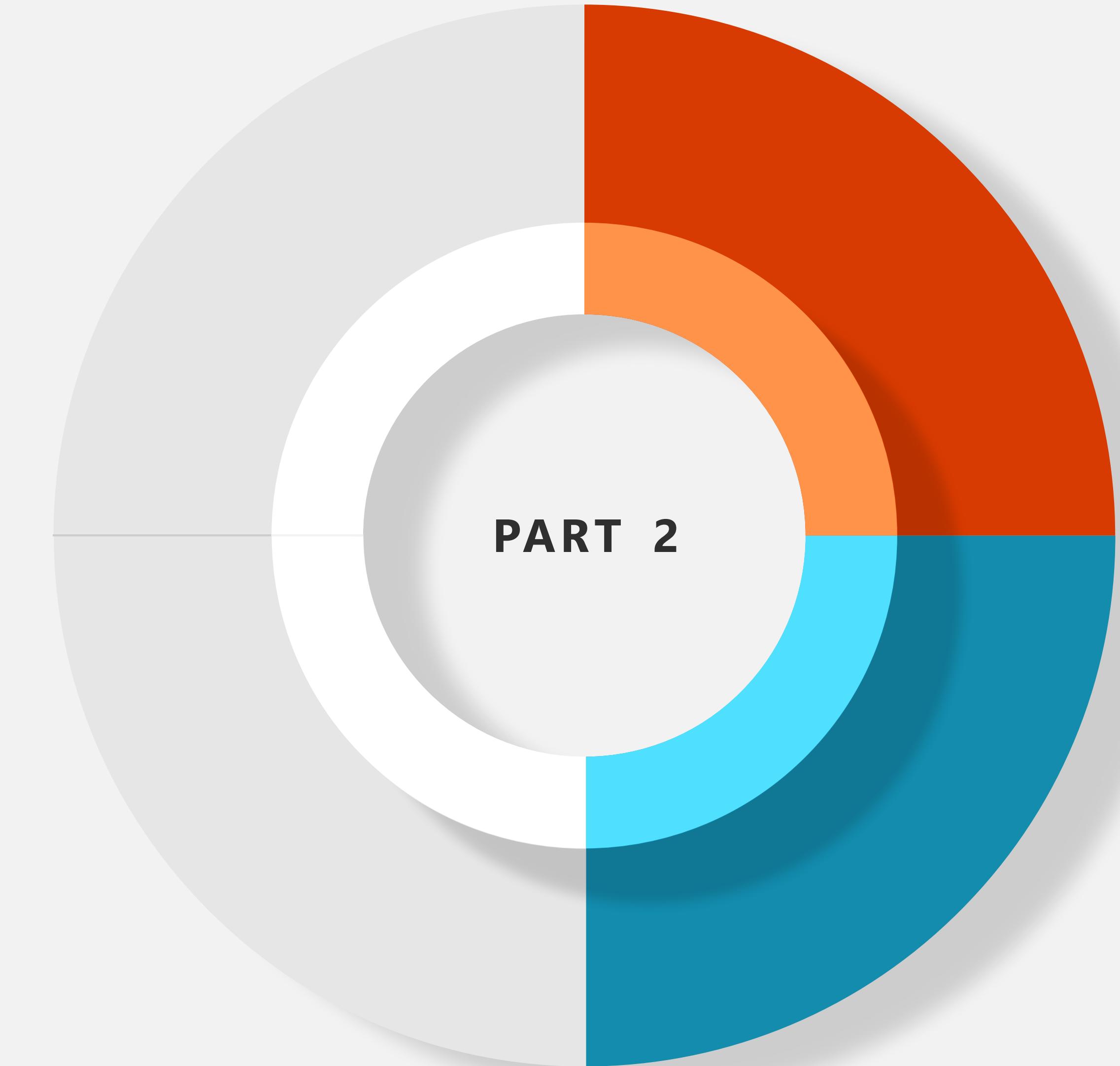
Contents

Who this is for:
Service leaders responsible for contact center and customer service experiences.

Estimated reading time:
9 minutes

Definition / Service sophistication model:

A tool to help organizations assess and understand the complex mix of strategies they need to deliver a specific service experience.

Give every customer a smooth support experience

At any given time, on any day, your organization must quickly assist customers who reach out for product and service support. They might arrive through multiple avenues—phone, email, social, chat, and other digital channels. Everyone expects exceptional service.

Many people use automated processes and intelligent self-service tools, such as virtual assistants and chatbots. However, when individuals want or require personalized assistance from human agents, organizations with unified, intelligent routing gain a competitive edge. It enables them to:

- Connect customers with the best agent to address their needs.

- Deliver consistent, efficient routing from any channel.

- Quickly prioritize, triage, and assign requests.

- Balance agent workloads and make appropriate assignments.

- Enable faster issue resolution.

Customers get the help they need, in the fastest, most convenient way possible. No delays, detours, or dead ends. Agents work with greater speed and productivity. With fewer costs.

Read this e-book to learn how your organization can best progress toward proactive, intelligent routing. It follows the first e-book in the service sophistication model series—Engaging Customers on Their Terms.

Define your growth priorities with the service sophistication model

Service sophistication model
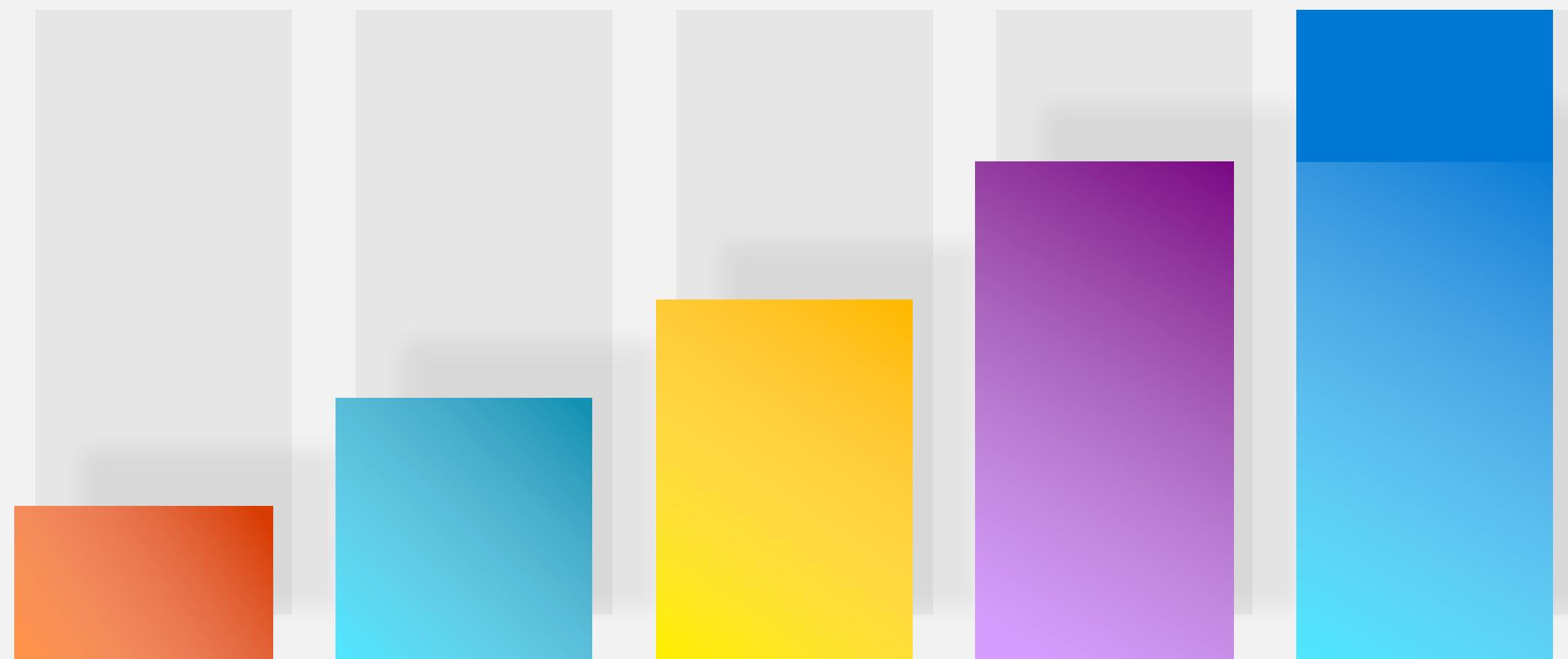
Level 1	Level 2	Level 3	Level 4	Level 4+
Cost centric	Metric centric	Data centric	Profit centric	Future centric
Address basic needs with simple, standard processes.	Make measurable improvements by organizing digital capabilities.	Enable proactive service and a growth mindset with insights from data.	Use AI insights to clean up inefficiencies and intelligently predict issues.	Optimize service support to focus energy on aspirational goals.

The service sophistication model provides a 4+ level framework for assessing your service experience against what's happening in the market. It also helps you understand what's needed to progress from one level to the next.

If you're beginning with basic customer care solutions or already a mature organization offering world-class customer services, use the model to effectively evolve your capabilities.

The service sophistication model also assists organizations in assessing and modernizing employee experiences. Whether you're connecting with customers or employees, use the model to help plan your transformation. Your organization can achieve greater value and ROI with fewer technology investments.

LEVEL 1

Cost centric

UNIFIED ROUTING	AUTOMATIC CALL DISTRIBUTION
Manual, agent-dependent case transfers	First-in, first-out queues for each transfer

When it comes to customer service, level 1 organizations don't measure up to many of their industry peers.

You provide basic support services, prioritizing cost containment over customer and agent experiences. Incoming service requests are manually routed to the next-available agent, without distinguishing between account or service needs.

What you're able to do:

- Rely on human agents to gather initial information and then categorize and distribute incoming service requests.

- Manually transfer incoming requests to the appropriate team or department.

- Deal with request bottlenecks and delays during peak support times.

What holds you back:

Customers often experience long wait times. When they reach an agent—or are transferred to another agent—they must explain their service problems to each person. In addition, agents make mistakes when capturing and communicating request details, further frustrating customers. Inefficient routing processes and excessive transfers reduce productivity and drive costs higher.

How you advance to level 2 (metric-centric service):

- **Offer call scheduling** with agents knowledgeable about a service request.

- **Give agents access to account details and service needs** so they more quickly resolve requests.

- **Provide supervisors with performance insights** so they can take steps to minimize agent errors and process inefficiencies.

LEVEL 2

Metric centric

UNIFIED ROUTING	AUTOMATIC CALL DISTRIBUTION
Some automated context gathering	Call scheduling and basic performance data

When agents have some background on a service request, they often spend less time communicating with experts and supervisors on how to resolve the issue.

You seek to measurably improve customer and agent experiences. You streamline some processes and do generate some insights for improving process efficiencies—but haven't yet automated routing and distribution.

What you're able to do:

• Provide agents with basic background for validating accounts and getting up to speed with service needs.

• Improve queuing experiences by shortening wait times and offering call scheduling.

• Evaluate agent and process performance through periodic, manual analysis of routing data.

What holds you back:

Customers wait in queues until the right person or resource is free to help, or are transferred multiple times and forced to repeat basic information. Your agents aren't well versed in proper escalation channels.

How you advance to level 3 (data-centric service):

• **Add automated routing and distribution capabilities** to help ensure the right agents are assigned to cases.

• **Deploy robust, rules-based protocols** for prioritizing incoming requests.

• **Streamline processes for identifying and categorizing service issues,** from submitting a request to needing to speak with a supervisor.

• **Plan for actual agent availability** by including current caseloads and schedules into distribution protocols.

LEVEL 3

Data centric

UNIFIED ROUTING	AUTOMATIC CALL DISTRIBUTION
Rules-based routing	Rules-based assignments and some automatic analytics

Rules-based routing and distribution processes help ensure customers quickly connect with agents who efficiently help them.

You take transformation one step further. You capture additional information on incoming service needs and use it to help drive automated, rules-based routing and distribution processes. Agents use specialized but predictable skills.

What you're able to do:

- Rely on initial agents or rules-based assistants to gather data.

- Automatically prioritize each incoming service request and find an appropriate agent or other resource.

- Automatically transfer relevant case context when escalating cases.

- Assign cases based on agent expertise, skill, and real-time availability.

- Analyze agent availability and resource management trends.

What holds you back:

Automated routing still relies on manual data entry—possibly introducing inaccuracies or overlooking relevant service needs. Your rules-based ticket protocols rarely cover all situations and fail to factor in issue severity and customer sentiment.

How you advance to level 4 (profit-centric service):

- **Use virtual assistants to add context** to incoming service requests, pinpoint root causes, and predict other issues resolvable.

- **Intelligently categorize and prioritize incoming requests** based on needed expertise, live sentiment, and issue severity.

- **Fully analyze and address any inefficiencies** related to routing protocols or workforce availability and performance.

LEVEL 4

Profit centric

UNIFIED ROUTING	AUTOMATIC CALL DISTRIBUTION
Intelligent routing	Intelligent case assignments and analytics

Seamless, efficient, and personalized interactions build customer trust in products and services—and contribute to growth and profitability.

You embrace an innovative, systematic approach. AI bots supplement service requests with account and product details. Intelligent routing capabilities rapidly identify each customer and offer resources that resolve the issue.

What you're able to do:

- Seamlessly transfer service requests between agents and virtual assistants.

- Select experts based on availability, efficacy, and past performance on similar customer needs.

- Rely on virtual assistants to resolve common issues and predict upcoming needs based on account and product information.

- Begin to analyze customer-agent interactions for live sentiment and other insights used to classify and route incoming service requests.

- Effortlessly analyze, diagnose, and resolve issues affecting routing performance and availability of agents.

What holds you back:

Virtual assistants can't always predict upcoming service needs, and these requests aren't effectively factored into case distribution estimates. Room exists for further improvements that ease and reduce interactions between customers and agents.

How you advance to level 4+ (future-centric service):

- **Empower agents with complete customer profile** and interaction-specific insights.

- **Go beyond predetermined process flows and queuing logic** by incorporating robust, machine-learning capabilities.

- **Enable the entire support system to operate seamlessly** as a single contact center across time zones, support topics, and customer needs.

LEVEL 4+

Future centric

Virtually nothing holds your organization back. Over time, you aspire to further optimize existing classification and assignment capabilities and add new, truly transformational ones.

What do you strive to do?

- **Consistently classify incoming service requests from any channel,** considering predictive behavioral attributes, live sentiment, and required skills and effort.

- **Dynamically adjust routing algorithms and processes** to respond to atypical request volumes, service outages, and expected next-action needs.

UNIFIED ROUTING	AUTOMATIC CALL DISTRIBUTION
Detail supplementation and proactive AI support	Calls distributed based on ability to assist with next steps

Level 4+ organizations evolve their routing capabilities with cutting-edge innovations, establishing themselves as industry pacesetters.

The following KPIs for level 4 organizations can help you define and establish your own measurements of success.

CUSTOMER KPI	COST KPI	EFFICIENCY KPI
↓ First response time	↓ Customer handover rate	↓ Average call transfer rate
↑ First call resolution rate		↑ Agent/employee productivity

Organizations with intelligent routing capabilities achieve tangible outcomes in customer service and business operations.

How Microsoft HR boosted employee engagement

Microsoft Human Resources (HR) services more than 1 million questions annually from its internal customers—Microsoft employees. Inquiries range from the simple, such as how to apply for a specific benefit, to the complex, such as what's involved in moving to a new location or job.

Yet for many years, Microsoft HR handled all requests largely the same way: Submitted through email, each inquiry was manually routed to the next-available HR advisor, without considering the employee's specific needs.

To create more engaging, satisfying user experiences, Microsoft HR deployed AskHR, an AI-driven employee engagement platform. Built with Dynamics 365 and Microsoft Power Platform, AskHR accepts requests through a web portal, chatbot, and other channels. It then intelligently classifies the more in-depth inquiries and routes each one to an appropriate advisor for faster, more personalized support.

Reduced case resolution time by 18 hours per case, on average.
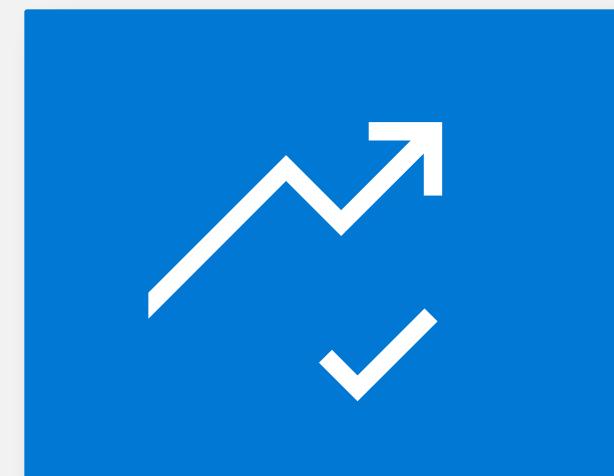
Increased rates for solving issues at the first point of contact to 29 percent.

Improved advisor productivity, saving more than 3,000 advisor hours each month.

Take charge of your customer service strategy

Exceptional service—the kind of service that distinguishes world-class organizations—requires unified, intelligent routing. Customers feel heard and understood, and agents have more time to focus on what matters most.

Whatever your goals for modernizing your service operations, use the guidance in this e-book—and an open, adaptable, and secure platform like Microsoft Dynamics 365 Customer Service—to get more out of your technology investments. And at the same time reduce the associated complexity and risks.

Read the next e-book in this series to learn how to use the service sophistication model to boost agent productivity and evolve your case management and resolution capabilities.
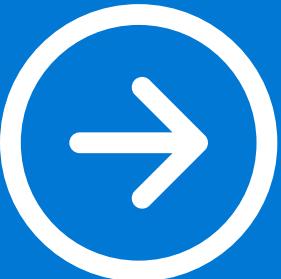
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