CX Best Practice Success Story – Omni-Channel

Company Description

World Vision Canada is a Christian global relief, development and advocacy organization. We partner with children, families and their communities to reach their full potential by tackling the causes of poverty and injustice. Empowering people out of poverty, World Vision helps more than 4 million children in nearly 100 countries. Fighting for what matters. For every child. For the last 65 years.

World Vision Canada Contact Center Description

Locations

Mississauga, Ontario, Canada

Montreal, Quebec, Canada

Call Types

Update account and contact information, to cancel support, make an inquiry about donation or program, request tax receipts, make a donation

Customer Types

Canadians who support or want to support the work of World Vision

CSR Headcount

94 CSRs

Contact Channels

Inbound and outbound phone calls, email, website, in-person, IVR, chat, Social Media

Hours of Operation

Monday to Thursday, 8:00 am to 11:00 pm EST

Friday – 8:00 am to 8:00 pm EST

Saturday – 10:00 am to 6:00 pm EST

Contact Volume

150,000 inbound calls

330,000 outbound calls

30,000 emails

4,100 chats

11,000 correspondence letters

World Vision Canada (WVC)

History of World Vision’s Contact Center

For many years, World Vision’s contact center tracked all customer interactions by recording the details of these conversations in record books and paper files. For each customer request or inquiry, whether by telephone or letter, our way of communicating escalations, follow-ups, field inquiries and internal messages were handled by paper-routings to specialized teams.

Back then, our response time to customer questions, inquiries or escalations would have taken a protracted period of several months, as manual work was always required for resolution. Our electronic customer database, DCSS, (institutional enterprise database DCSS which stands for Donor Central Support System) did not include any outbound record of mail such as marketing appeals sent to our customers. Hence, our agents would not be aware of the various items our customers may have received. Our customer service communication style with our customers also tended to be very transactional, as we did not have the resources needed to add a relational quality to our conversations.

Our transition to DCSS was very basic, but it allowed our agents to record contact histories and the details of all their inbound and outbound conversations. We later transitioned to various electronic means of internal and external communications, including email and electronic routings. While we transitioned and enhanced our DCSS platform, we also developed a way for our agents now had access to a resource database with Q&A’s, emergency information and copies of marketing appeals, which helped to reduce our response time with our customers. The results allowed for more robust conversations with our customer having critical information readily available at the point of each interaction.

With the implementation of CRM and our case management system, we also recognized the need to shift all our communications from being primarily transactional, to relational and customer-centric. This required that we have real-time access to time-stamped communications across all our channels, including telephone (live and IVR), letters, emails, chats, voice messages, website, chat and social media. As such, we implemented processes and a customer experience that created a seamless omni-channel experience.

Best Practices Used

Agent Call Handling to Create a Seamless Experience

When a customer contacts us, our agents are immediately required to review the customer account and acknowledge to the customer what the customer might have been trying to do prior to calling the call center. As part of this process, they review the customer transactions and next steps.

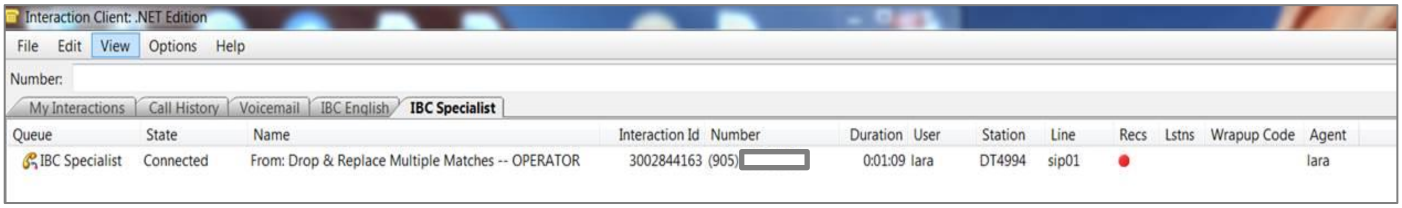
Our IVR is enhanced to reduce call transfers and customer dissatisfaction to assist in the omni-channel experience. The World Vision Canada (WVC) contact centre has approximately 20 active toll-free numbers (TFNs). While the majority of these toll-free lines go directly to a specific group, we have about 5 English TFNs and 2 French TFNs that have an IVR – primarily because they generate high volumes. All inbound interactions (calls/emails/chats) are routed through our Automatic Call Distribution (ACD) system. Each agent is assigned specific workgroups and skills in their profile based on what they have been trained on.

With regards to inbound calls, we want to ensure that each call goes to the most appropriate agent to reduce call transfers. Our IVR is programmed with skills-based routing so that when a donor chooses a specific option, the call is directed to the right agent based on their skill and spoken language. Below are some examples of the skills that we have set for the agents:

- English
- French
- Gift Call (Donation)
- Technical Issues
- Account Maintenance
- Gift Catalogue
- Legacy
- Specialist
- Operator
- Email
- Chat
- Social Media

The same skill-set routing process applies to inbound emails and chats. However, only agents who are assigned to the email and chat workgroups, and who have the email or chat skill-sets, will receive these types of interactions.

We also have TFN's that go to a designated group of agents (Specialist Workgroup) who are trained to handle more complex/escalated calls (see below). An example of TFN's that are part of the Specialist Workgroup are Project Closure Line and Drop & Replace Line. The TFN used by the customer will provide information to the agent about the general nature of their inquiry, and if it was web related (either a microsite, an email they received, or they visited the worldvision.ca or myworldvision websites.)



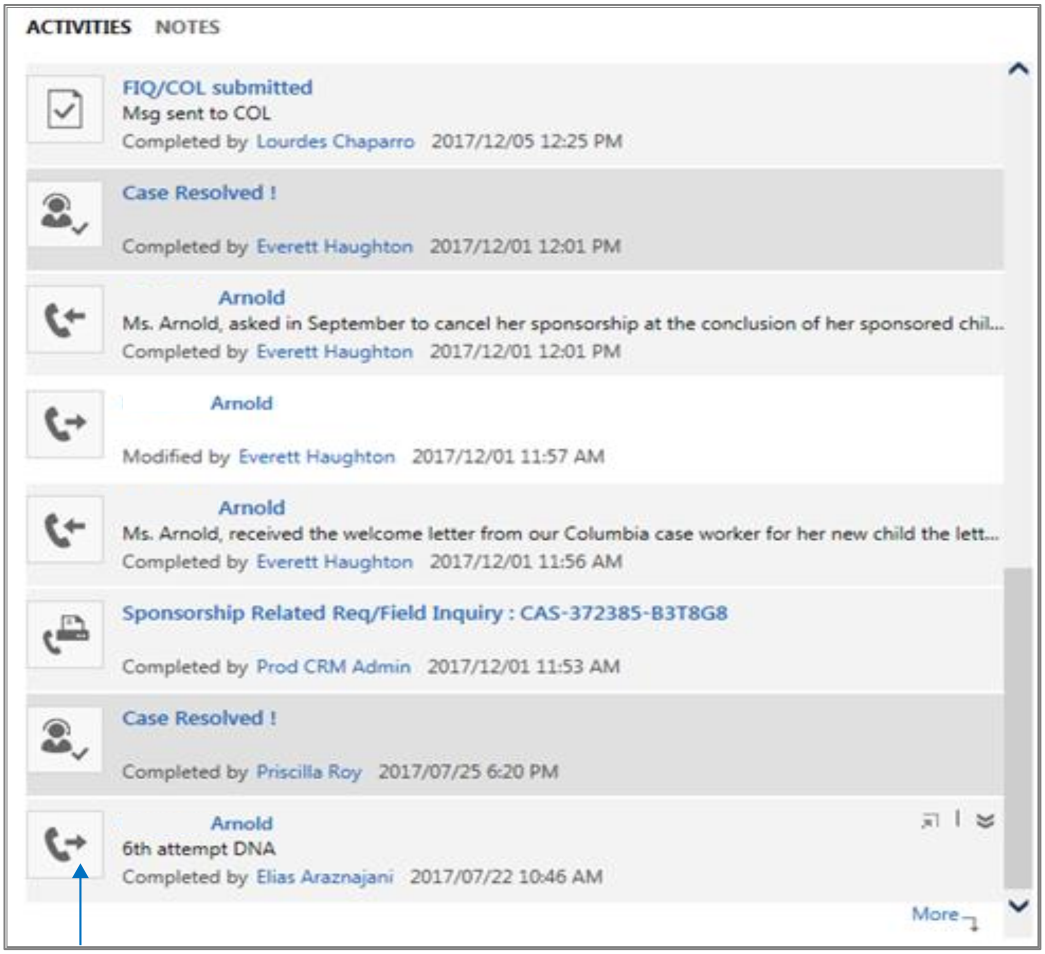
We have programmed our special TFN's (i.e., for escalated or donation related calls) to go "directly to an agent" versus an IVR to ensure that these are handled in a more timely manner and reduce potential abandoned calls.

Our IVR authenticates our donors via and pre-populates information for our agents so that the agents are aware of with whom they are speaking, even before the donor starts providing information. When calls are transferred from the IVR through to the Unified Service Desk, it automatically populates the donor information into the CRM, thus allowing the agent to know with whom they are speaking.

A donor health dashboard for all inbound and outbound donor calls is also provided within the CRM and to provides agents with key information about the donor, so the agent can begin a meaningful conversation at the start of the call, without scrambling to find talking points.

Training Procedures

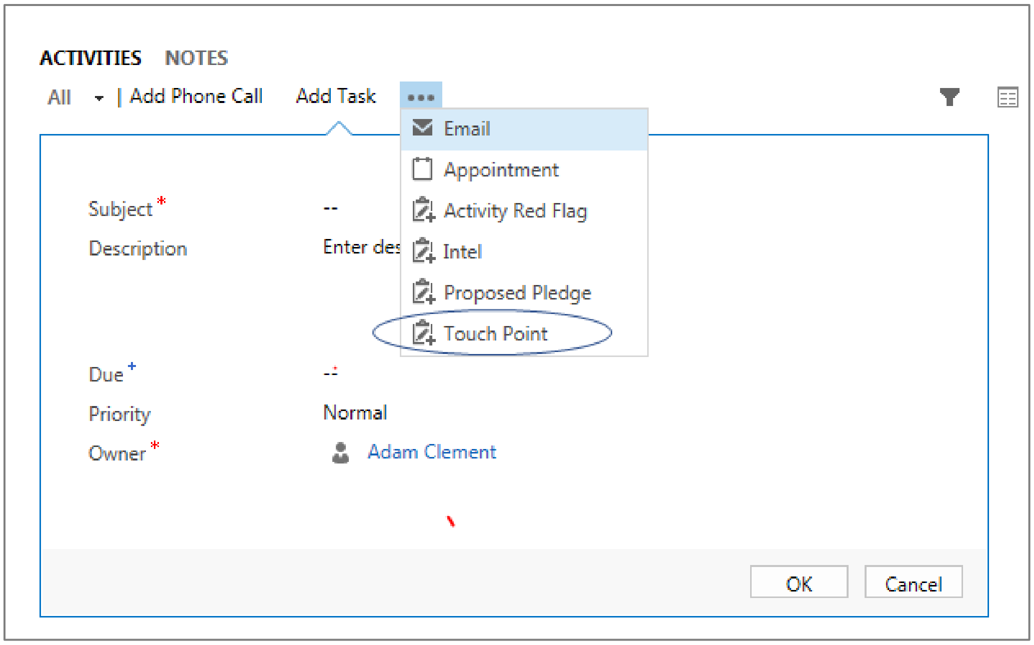
Our CRM allows agents to see if a donor has contacted us previously through various channels in the Activities section of a donor's profile. An example is shown below:



As indicated by the blue arrow in the screenshot shown above, each icon that shows next to the donors' name represents a different channel and action on the part of the agent. For example, the phone icon with an outward arrow represents an outbound phone call, the phone with the inward arrow represents an inbound phone call.

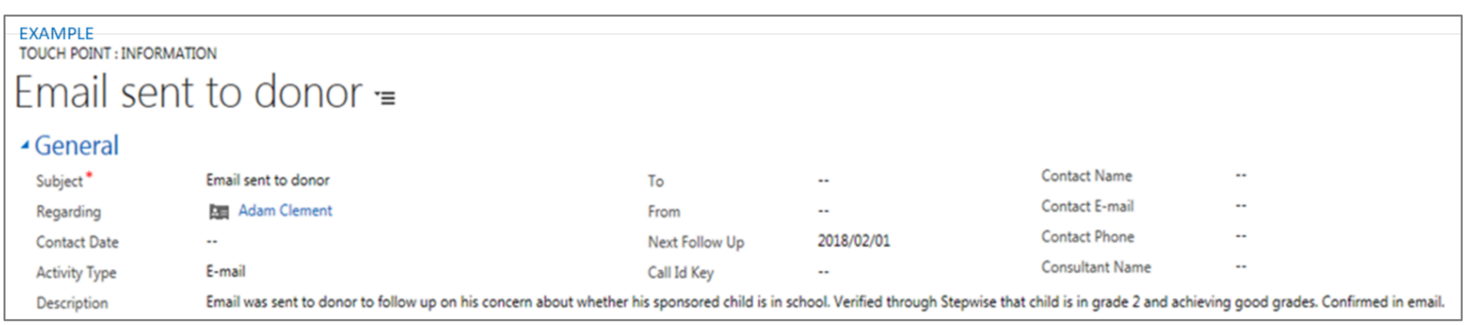
Emails are logged in a similar way, showing an envelope with an inward arrow representing inbound mail from the donor to WVC (see picture below):

Due to an issue with resolving Email activity types in CRM, agents record manual inbound or outbound emails and chats as a Touch Point in the Activities section of an account/case. As per below screenshot, within each touch point activity, there is a field to specify if the contact was an email or 'other' type (i.e., other is used for chat):



The below screenshot shows what our Touch Point icon looks like for our agents, so they can easily see what activities took place for a donor in real-time:

Agents are trained to record relevant details about each contact in their activities within a case on the donor profile, and each activity can be expanded to view these details by clicking on the activity. So, if a donor should contact us again to follow up about their request, or about something they had spoken with another agent about previously via any other channel, the representative they are speaking to will have all the relevant details to address their concerns.



A summary of all touch point information on previous communications with the donor is documented under the Activities touch point information contact history to allow an omni-channel experience for the donor. In most situations, a 'Case' file is created in the CRM system. Our agents are trained to review the information in the case file when they begin a dialogue with a donor. This allows the agent to understand the donors' previous engagement(s) with us, ensuring the donor does not have to start over at the beginning and re-explain everything to the agent when they contact us.

Our previous contact center experience for agents and donors was often challenging in the absence of readily accessible information showing the touch point activities that our donors experienced when contacting WVC. Today, our donors can fully expect to interact with agents who have fast access to, and knowledge of their past interactions including timely communication pieces, real-time information about field activities, and other pertinent information with which their requests and inquiries can be handled efficiently and effectively, as follows:

- Activities are created via Cases on the donor's profile, and to view the nature of the request; agents are trained to view the Associated Cases tab.
- Training documents outline the standard method to research an account thoroughly before making an outbound call attempt to contact a donor (although, research is touched on in the majority of our training sessions). This research enables agents to determine if the donor has already contacted us to update a credit card or some other form of account update prior to us attempting to contact them to update their account.
- Technical issues are logged in our CRM as a 'case' that is automatically forwarded to the technical issues queue.
- A complete history of the request (e.g., all actions were taken and requested by various agents, and the various channels the request has followed) is kept in the Activities of the case (this same info is visible on the donor profile).
- The same process is followed for VOC Voice of the Customer (VOC) complaints that require follow-up. These complaints are logged via Cases in CRM that are forwarded to the VOC team when the case is routed by the representative. Within the case/donor profile, a complete record of the various channels that the request has followed is displayed in the activities, along with the actions that have been taken to address the complaint. Again, agents record the actions that were taken, and any future follow-up required under activities.

We also have a dedicated Voice of the Customer (VOC) team who manages and processes all the complaints as outlined below:

- Customer Care is made aware of either through conversations with our donors or received through any of our contact channels.

- The VOC team captures the complaints and monitors it through to resolution either through various marketing partners in other departments or by managing to it themselves.
- All details of each complaint are logged in our CRM system and a separate VOC document, and a monthly report is shared with key organizational stakeholders, so they can manage trends and adjust customer experience processes as needed.
- The VOC team also manages high-level complaints that an agent or team leader cannot handle. Typically, these are defined as high-value donor complaints, or complaints that have been generated through the President's office, or a board member.
- The VOC team is skilled to manage these more delicate communications and ensure that a smooth end-to-end resolution is achieved, and the inquiry is resolved.

Improved Customer Experience Outcome

In summary, our previous contact center experience for agents and donors was often challenging in the absence of readily accessible information showing the touch point activities that our donors experienced when contacting WVC. By harnessing an omni-channel communication platform, we have enabled our contact center agents to be more customer-centric, broadened the options available to our donor's, and empowered WVC to deliver a seamless, and exemplary customer service experience.