

RingCentral

2019

TOP QUESTIONS TO INCLUDE IN A DIGITAL CUSTOMER SERVICE PLATFORM RFP



DIGITAL CUSTOMER SERVICE PLATFORM

ABOUT THIS LIST



BRIANA LASSIG

Sr. Product Marketing Manager at RingCentral

The playbook for customer success is being rewritten by a new breed of digital-first service leaders. Every chat, every tweet, every review... every customer interaction matters, and today the lifespan of digital interactions is often permanent. While there are dozens of additional questions you should consider, this is a list of the most important questions to ask to ensure you build the most advanced digital customer service strategy possible.

Best,
Briana Lassig

TOP RFP QUESTIONS FOR DIGITAL CUSTOMER SERVICE

KEY CAPABILITIES

IS YOUR SOFTWARE ABLE TO IDENTIFY AND MERGE DIGITAL PROFILES ACROSS CHANNELS?

Customers tend to have multiple profiles across various digital channels—a personal and professional email address and Facebook, YouTube, and Instagram accounts—all with different handles. If agents are unable to detect multiple identities as the same user, they spend more time resolving service issues, which increases operating costs and reduces productivity. It's critical to build a process that merges social identities and automatically identifies the best channels to answer customer inquiries.

DOES YOUR SOFTWARE LEVERAGE AI TO CLASSIFY AND INTELLIGENTLY ROUTE CUSTOMER INTERACTIONS?

Classification tags can be used to categorize interactions, while smart routing pushes them to the right agent based on urgency and competency. With classification tags, you can align agent skills with appropriate tags to facilitate a personalized customer experience. Take into account the nuances of each channel: the same message sent via email won't translate on Twitter due to character limitations.

DO YOU HAVE THE ABILITY TO AGGREGATE AND REPORT ON KEY KPIS ACROSS ALL DIGITAL CHANNELS?

Large amounts of transactional, conversational, and personal data are generated from within a business's application ecosystem. Managing your digital interactions on a single platform helps to unify reporting and analytics so you can review insights into the channels your customers use the most, determine what topics are trending per channel, and address common threads quickly. Make sure to use an open customer engagement platform that allows you to synchronize data from multiple sources.

INTEGRATIONS

DOES YOUR SOFTWARE INTEGRATE WITH INTELLIGENT VIRTUAL ASSISTANTS (E.G., GOOGLE DIALOGFLOW, ETC.)?

Intelligent virtual assistants (or chatbots) are used for automation interactions, typically in real time, so that the customer can get an answer without having to speak with an agent. The interaction is deflected so you can reduce the number of agents required to respond at the speed of the customer. You can enable collaboration between chatbots and agents by allowing the bot to hand over the interaction to an agent to maintain the best customer experience possible.

DOES YOUR SOFTWARE INTEGRATE WITH SALESFORCE OR OTHER CRMS?

Integrating business intelligence tools provides additional context on the customer during the interaction and merges their digital identity with their contact information in your CRM so that you can build a 360-degree view of the customer to service them more effectively.

DO YOU HAVE THE ABILITY TO ADD CO-BROWSING WITHOUT DOWNLOADS?

Reducing the number of steps and amount of effort it takes for a customer to get the help they need is critical to success in a modern digital world. Offering co-browsing to customers without requiring them to download an application improves time to resolution and enables agents to see what the customers see, with the full context of the customer's digital footprint.

DO YOU HAVE AN OPEN SDK?

To enable a seamless customer experience and a streamlined customer service workflow through a single platform for every digital interaction, you must select a solution that is designed to interact with your entire ecosystem. With an open SDK and APIs, you can easily develop custom integrations, including CRM integrations, ticketing, and more. Increase productivity and simplify resource management by reducing the number of tools and windows opened.

AGENT

DO YOU PROVIDE A SINGLE PLATFORM TO MANAGE ALL DIGITAL CHANNELS?

Through a single agent desktop, businesses can reduce the agent learning curve while increasing retention and productivity. By categorizing that data, such as by buying patterns, support issues, languages, channels, etc., you begin to understand how your customers think and act. And that means you can provide them with the personalized, seamless care they crave. With a 360-degree view of your customers and their behavior, agents can deliver experiences that will resonate with the customer, so the customer can build a stronger connection with your brand.

DO YOU PROVIDE A KNOWLEDGE DATABASE? DOES IT INCLUDE SUGGESTED RESPONSES?

A knowledge base is simply a repository of data that works as a self-service help desk for your service teams, containing information about your service, product, or other frequently asked questions. With contributors from all departments across the business, agents will be able to resolve service issues quickly, without having to leave the app to look for a response.

DOES THE AGENT DESKTOP SUPPORT RICH MEDIA (E.G., VIDEO, EMOJIS, PHOTOS, ATTACHMENTS)?

As social media, chat, and messaging apps have become more popular, emojis, gifs, and memes have also become new methods of communication or expression. Since much of customer service is carried out online today, rich media can help to support online “body language” to express emotion beyond words. Delivering the right information at the right time and in the correct format, language, and channel will shape a customer’s digital experience with your brand.

DO YOU PROVIDE AGENTS ACCESS TO CONTEXTUAL AND HISTORICAL DATA AROUND CUSTOMERS?

Providing historical data and behavioral context to agents prior to them beginning an interaction with a customer will help agents understand how interactions with a particular customer have been handled to date. If agents can view the history of all interactions between a customer and the company, such as history of transactions, Net Promoter Scores, survey results, pages visited, history of conversations, etc., they will be able to engage in smarter conversations and create amazing customer experiences.

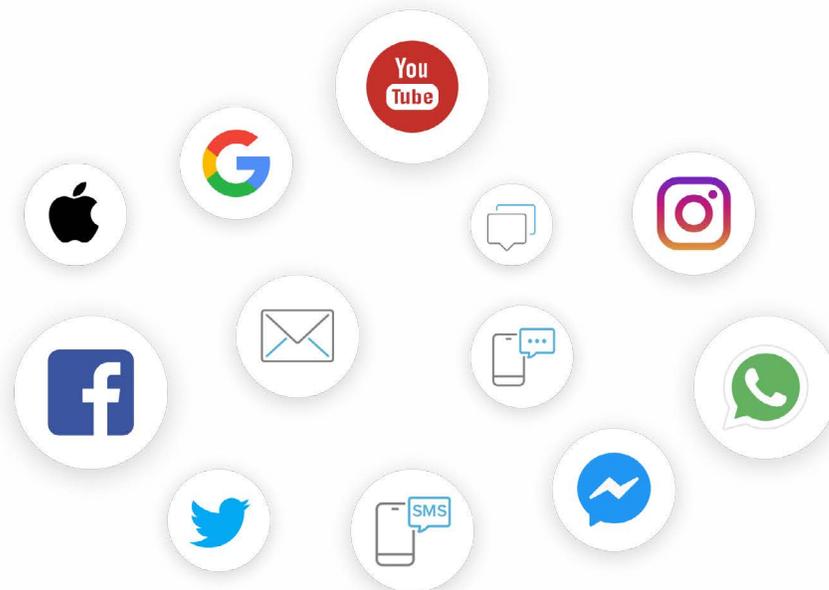
CHANNELS

DO YOU SUPPORT MULTIPLE DIGITAL CHANNELS?

Ninety-seven percent of employees in customer service roles agree that as organizations add channels to engage with customers, customer satisfaction and Net Promoter Scores improve. To keep up with evolving customer preferences and maintain brand loyalty, your customer care must become more digitally focused.

DO YOU SUPPORT IN-APP MESSAGING?

If you want your brand's communication touch points to be intuitive and familiar to customers, you must offer the rich interfaces they're used to using in their personal lives. In-app messaging facilitates smoother transactions and frictionless experiences for customers while maintaining the context of conversations so agents can achieve engagement-driven business goals more quickly.



CHANNELS

DO YOU SUPPORT GOOGLE BUSINESS MESSAGING, YOUTUBE, GOOGLE PLAY, OR OTHER GOOGLE PROPERTIES?

Show customers you're listening by monitoring comments and ratings on all your Google My Business pages or locations. You'll drive more app downloads by managing and responding to reviews on every distribution channel.

DO YOU SUPPORT APPLE BUSINESS CHAT?

While fairly new to the market, the Apple Messages app uses end-to-end encryption, which means Business Chat is a safe option for you and your customers. It's a customer service tool that is easily discoverable through onboarding points embedded throughout the iOS experience such as Safari, Siri, Spotlight, or even Apple Maps.

DO YOU SUPPORT FACEBOOK, FACEBOOK MESSENGER, INSTAGRAM, AND WHATSAPP?

Users are accustomed to being able to pause and restart conversations at their convenience. This means that brands must enable continuous messaging conversations without time constraints but also add context to the historical interactions within the agent desktop in order to truly enable a seamless flow between synchronous and asynchronous conversation. With 1.3 billion monthly active users on Facebook Messenger and 1.5 billion monthly active users on WhatsApp, you need to be able to ensure operational efficiency and traceability of exchanges.

DO YOU HAVE THE ABILITY TO ADD MESSAGING AS AN OPTION IN AN IVR?

When customers call into your support center, they are typically diverted through the IVR to the agent with the skills to resolve that particular issue. In today's digital world, businesses can implement IVR deflection so customers can, for example, click 1 for Facebook Messenger or 2 for WhatsApp, to continue their conversation when an agent becomes available. Rather than wait on hold, the customer receives a link via SMS to pick the conversation back up on their channel of choice, saving them time and increasing overall satisfaction.

STRATEGIC

FACEBOOK, GOOGLE, AND APPLE ARE INVESTING MILLIONS IN CONSUMER-TO-BUSINESS MESSAGING. HOW DO YOU SEE THIS IMPACTING THE WORLD OF CUSTOMER SERVICE AT LARGE?

Digital service leaders understand that consumers spend a full quarter of their waking hours navigating their worlds through their mobile devices. When a person needs a ride to the airport, wants their groceries waiting when they arrive home, or wishes to pay their bills online, they expect near-instant gratification. Customer service is no different, and the business limitations associated with office hours, languages, and channels are not their concern—it's yours.

The sheer number of different apps that have surfaced as a result, however, have made supporting users across crowded ecosystems difficult, time consuming, and costly. Enter rich communication services (RCS), an upgrade from SMS to a more interactive and capable platform.

Imagine being able to complete a transaction, schedule a call, or view links for different product purchase options—all within a master application platform—without needing to leave and download a separate app for each service. As tech moguls like Facebook, Google, and Apple continue to add these types of services and capabilities to their platforms, they become a more integral part of daily life, and this makes it harder for customers to abandon their usage as a result.





About RingCentral

RingCentral, Inc. (NYSE: RNG) is a leading provider of business cloud communications and contact center solutions based on its powerful Message Video Phone™ (MVP™) global platform. More flexible and cost effective than legacy on-premises PBX and video conferencing systems that it replaces, RingCentral empowers modern mobile and distributed workforces to communicate, collaborate, and connect via any mode, any device, and any location. RingCentral offers three key products in its portfolio including RingCentral MVP™, a unified communications as

a service (UCaaS) platform including team messaging, video meetings, and a cloud phone system; RingCentral Video®, the company's video meetings solution with team messaging that enables Smart Video Meetings™; and RingCentral cloud Contact Center solutions. RingCentral's open platform integrates with leading third-party business applications and enables customers to easily customize business workflows. RingCentral is headquartered in Belmont, California, and has offices around the world.

RingCentral

For more information, please contact a sales representative. Visit ringcentral.com or call 800-378-8110.

RingCentral, Inc. 20 Davis Drive, Belmont, CA 94002. ringcentral.com

© 2019 RingCentral, Inc. All rights reserved. RingCentral, RingCentral MVP, and the RingCentral logo are trademarks of RingCentral, Inc. Other third-party marks and logos displayed in this document are the trademarks of their respective owners.