Steve Young
Vice President
Mathtech, Inc.

Christine Quinn
Digital Transformation
Executive
Public Sector
Salesforce, Inc.

# Roadmap Planning

"If you want something new, you have to stop doing something old."

-Peter Drucker
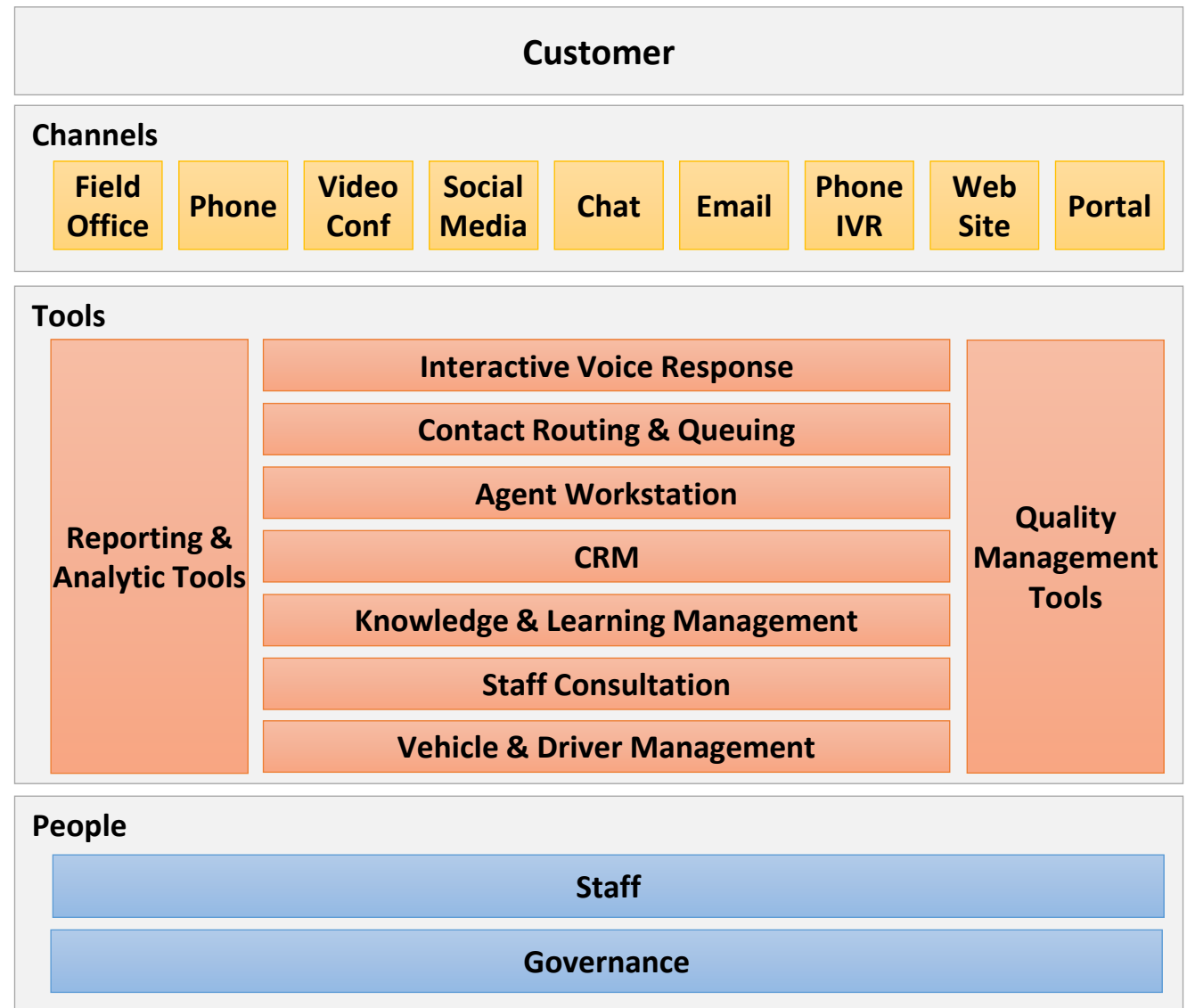
Our plan for achieving incremental improvements

- **Learn** – What's new? What are the best practices? What have others done and learned?
- **Assess Strengths & Weaknesses** – Where do we need to improve?
- **Vision** – How do we want to operate? What channels will we support? What problems do we want to solve?
- **Strategy** – How will we accomplish the Vision? What changes do we need? What is our plan? What resources are available?
- **Implement** – Execute the Strategy.
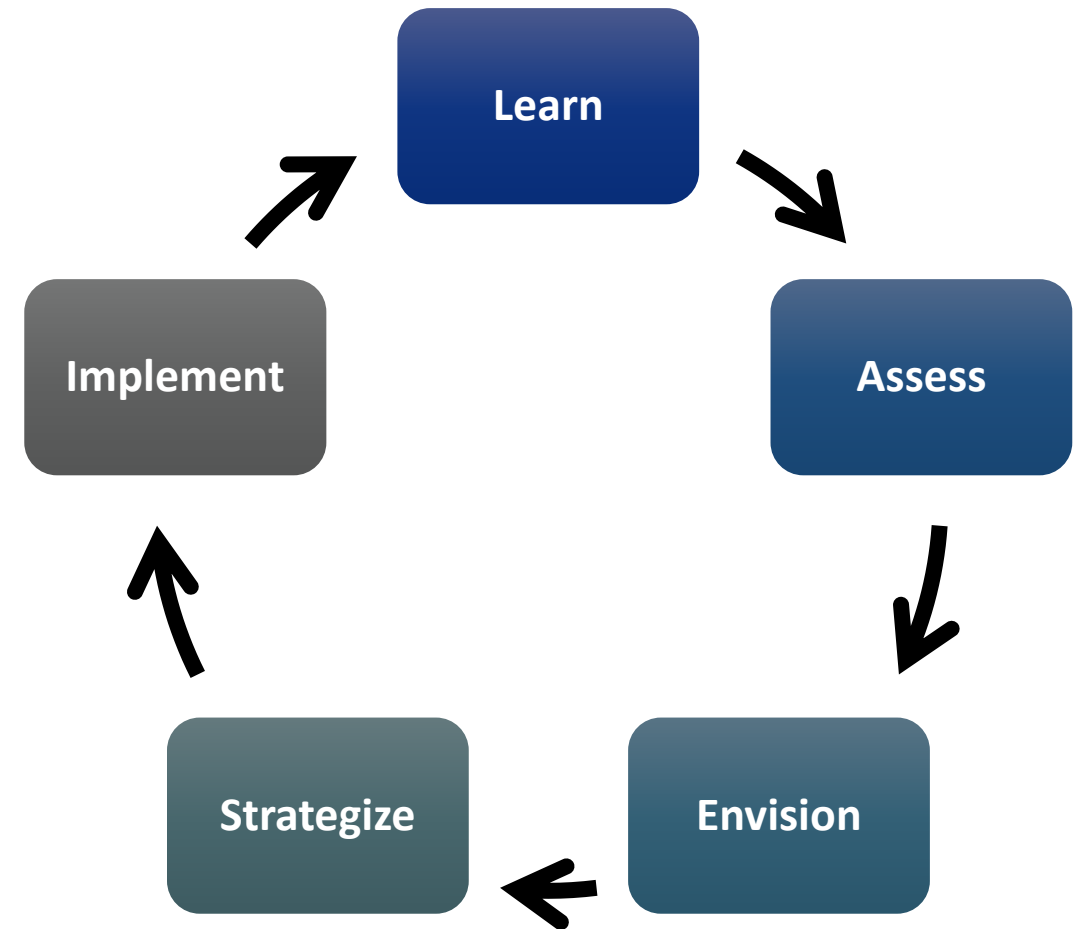
Assessing your current Contact Center operations requires an approach that organizes and identifies what you have

…or want to have.
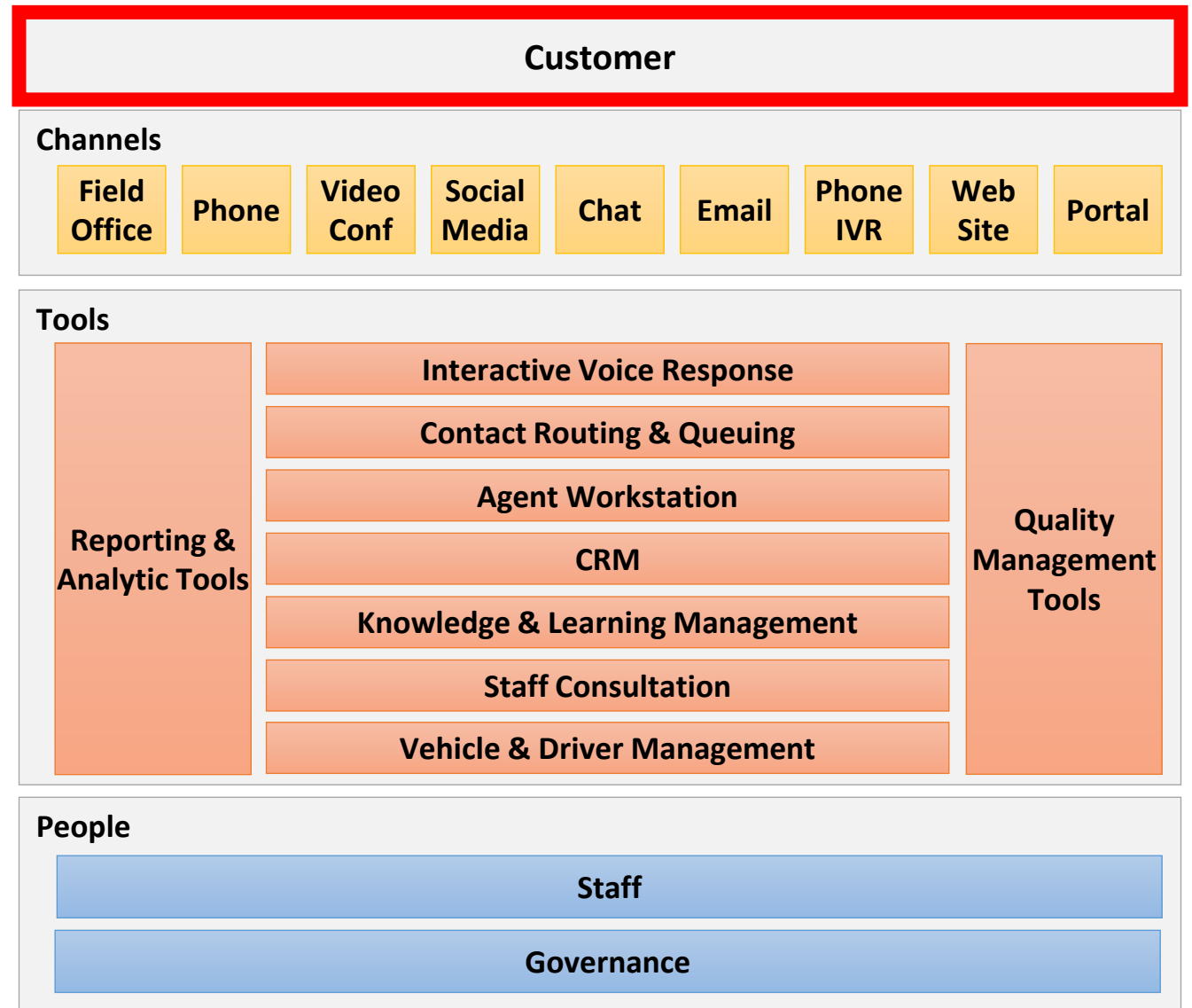
A model gives us a tool for
- Focusing our analysis
- Describing plans to others
- Ensuring completeness

Customer

Channels
| Field Office | Phone | Video Conf | Social Media | Chat | Email | Phone IVR | Web Site | Portal |

Tools

Reporting & Analytic Tools

Interactive Voice Response
Contact Routing & Queuing
Agent Workstation
CRM
Knowledge & Learning Management
Staff Consultation
Vehicle & Driver Management

Quality Management Tools

People

Staff

Governance

Potential Customers

- Personal Drivers
- Commercial Drivers
- Personal Vehicle Owners
- Business Vehicle Owners
- Fleet Owners
- Business Partners
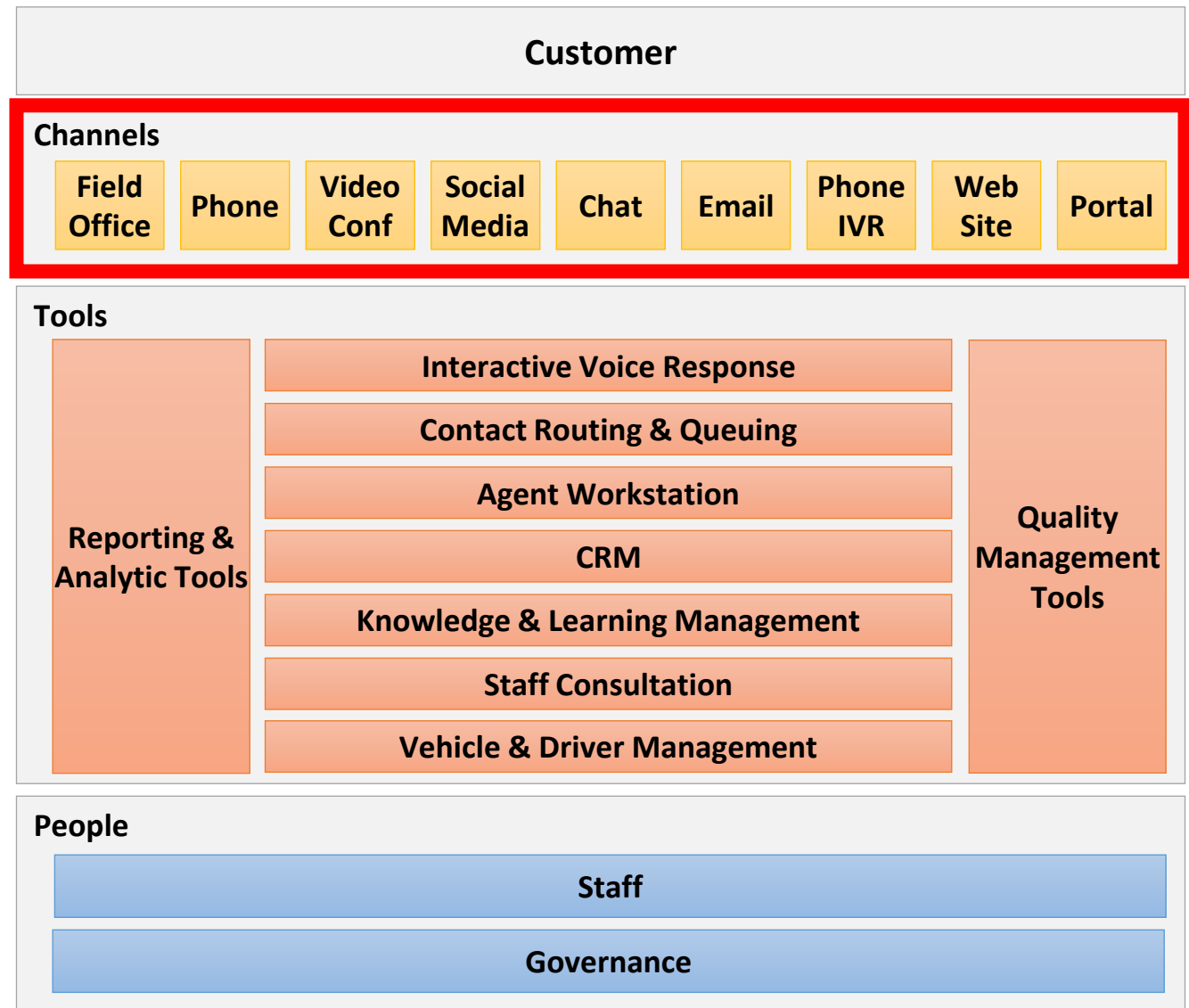- Dealers, Tag & Title, Lenders

With so much available as self service – contact centers may be getting the most complicated customer requests.

Customer

Channels

Field Office	Phone	Video Conf	Social Media	Chat	Email	Phone IVR	Web Site	Portal

Tools

Reporting & Analytic Tools

- Interactive Voice Response
- Contact Routing & Queuing
- Agent Workstation
- CRM
- Knowledge & Learning Management
- Staff Consultation
- Vehicle & Driver Management

Quality Management Tools

People

Staff

Governance

Potential Channels

- Phone
- Video Conference
- Social Media
- Chat
- eMail
- IVR
- Web Site
- Portal

You may not need all of these to meet your goals.

Customer

Channels

| Field Office | Phone | Video Conf | Social Media | Chat | Email | Phone IVR | Web Site | Portal |

Tools

Reporting & Analytic Tools

- Interactive Voice Response
- Contact Routing & Queuing
- Agent Workstation
- CRM
- Knowledge & Learning Management
- Staff Consultation
- Vehicle & Driver Management

Quality Management Tools

People

- Staff
- Governance

**American Association of Motor Vehicle Administrators**

AAMVA

Service Options

- In Person
- Live Support
- Automated Support
- Self-Service

Interaction Types

- Customer Transactions
- Information and Support

Channels

| Field Office | Phone | Video Conf | Social Media | Chat | Email | Phone IVR | Web Site | Portal |

In Person

Live Support

Automated

Self Service

Customer Transactions

Information
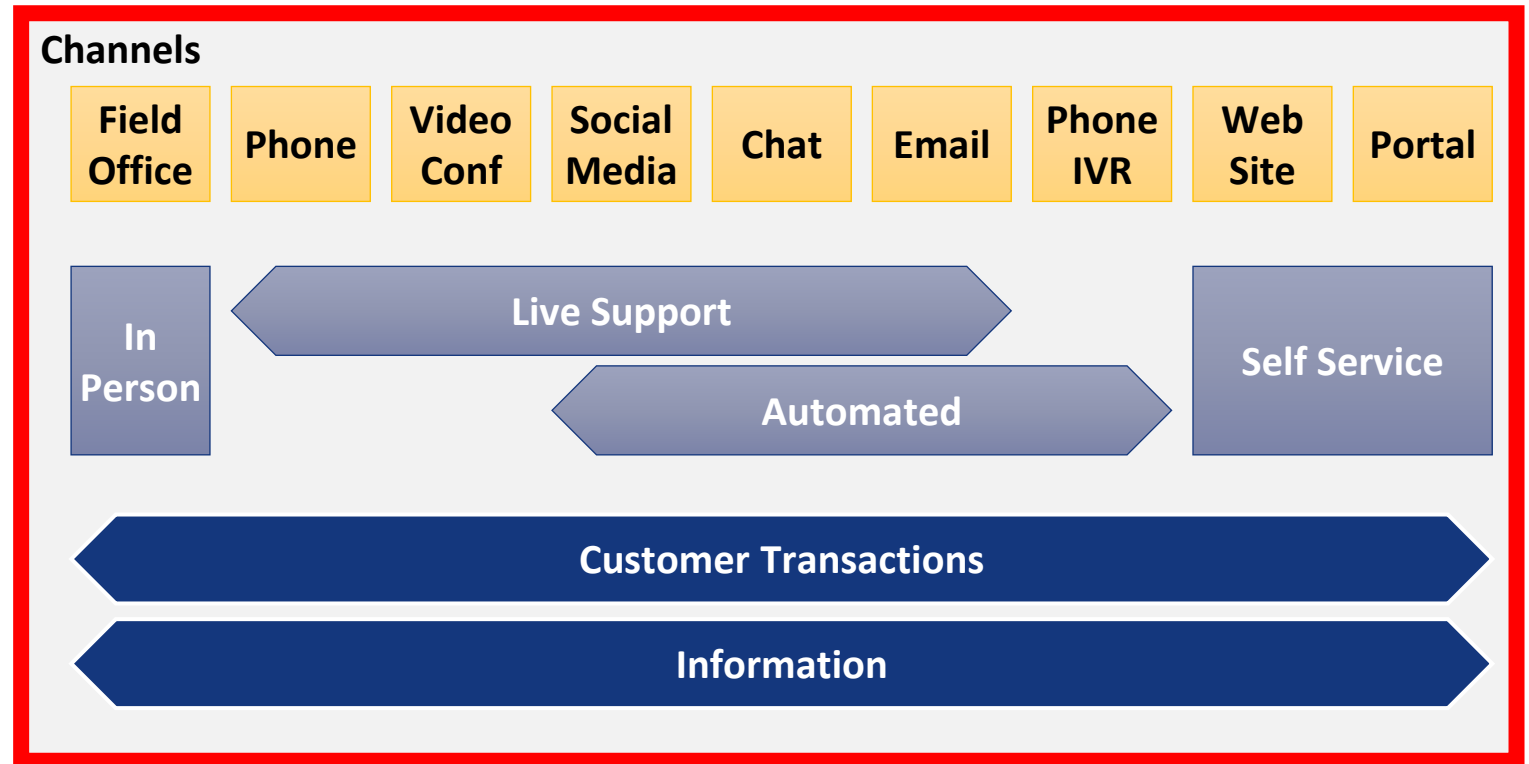
Potential Tools

- Interactive Voice Response
- Contact Routing & Queuing
- Agent Workstation
- Customer Relationship Mgmt.
- Knowledge & Learning Mgmt.
- Staff Consultation
- Quality Management Tools
- Reporting & Analytic Tools
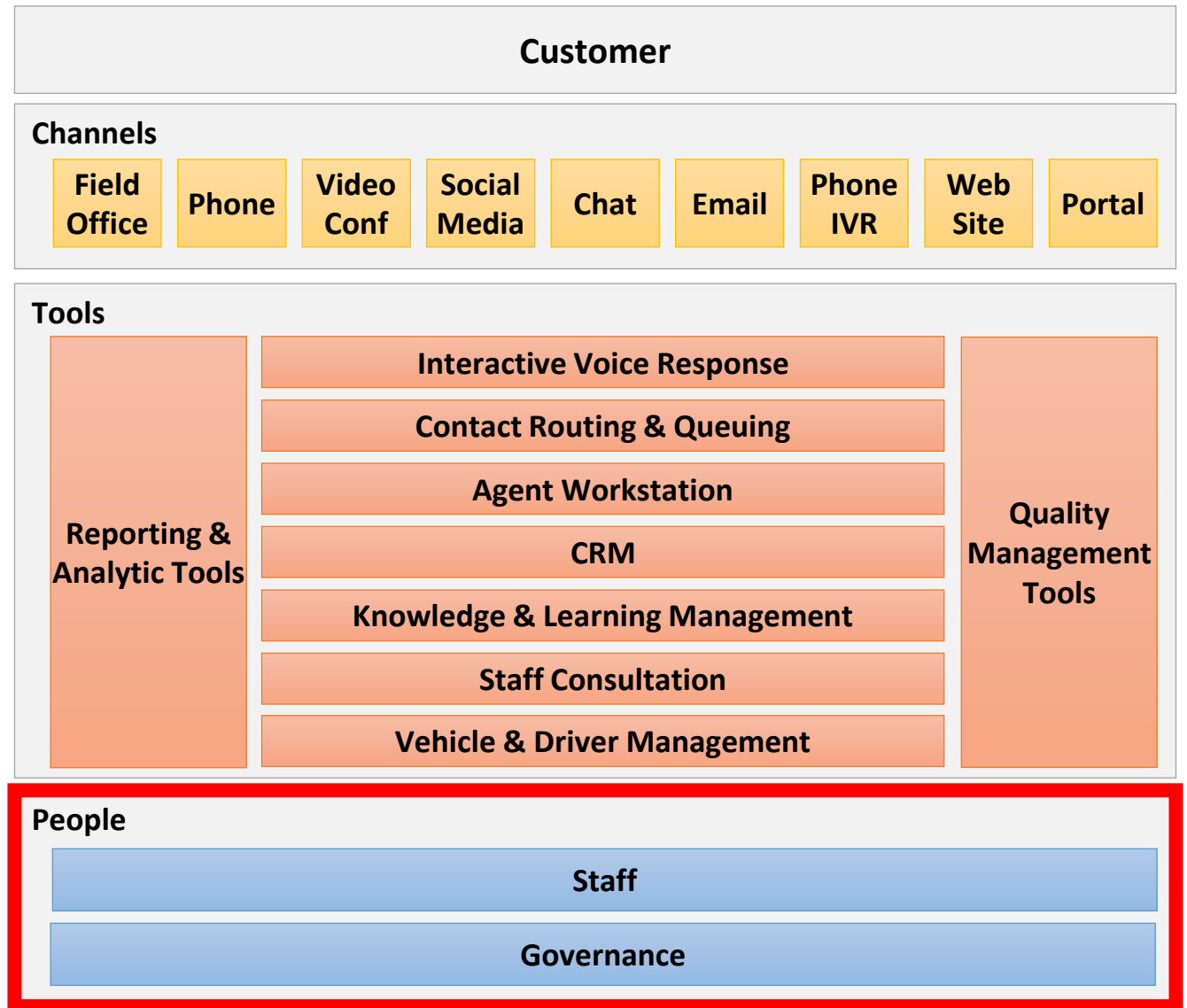- Vehicle & Driver Management

Customer

Channels

| Field Office | Phone | Video Conf | Social Media | Chat | Email | Phone IVR | Web Site | Portal |

Tools

Reporting & Analytic Tools

- Interactive Voice Response
- Contact Routing & Queuing
- Agent Workstation
- CRM
- Knowledge & Learning Management
- Staff Consultation
- Vehicle & Driver Management

Quality Management Tools

People

Staff

Governance
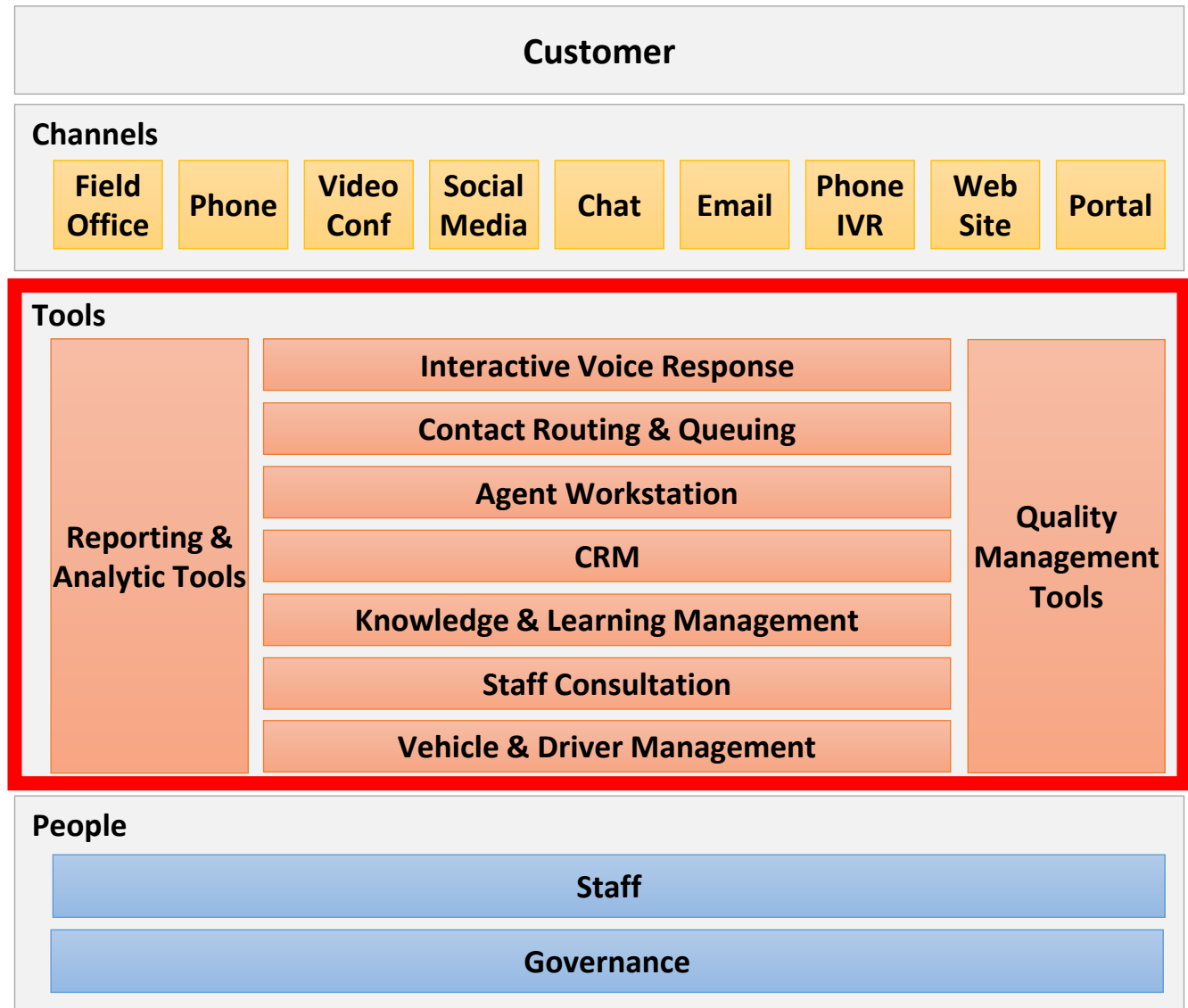
- **Interactive Voice Response (IVR) Systems:** These systems provide automated prompts and routing options for customers to quickly get the help they need without speaking to an agent.

- **Contact Routing and Queuing Systems:** These systems ensure that incoming customer inquiries are routed to the most appropriate agent or department based on their skills, availability, and customer needs.

- **Agent Workstation:** These systems provide the tools an agent needs to communicate with customers, conduct transactions, retrieve and view documents, manage their workload, and collaborate with team members.

- **Customer Relationship Management (CRM) software:** This software helps agents manage customer interactions, track customer information and history, and streamline communication across channels.

- **Knowledge & Learning Management Systems:** These systems provide agents with access to a centralized knowledge base of customer information, product or service details, and troubleshooting guides to help them quickly resolve customer issues. Learning Management provide a framework for training.

- **Staff Consultation Tools:** These tools enable agents and managers to communicate with each other in real-time and share information across channels to provide faster and more effective customer service.

- **Driver & Vehicle System:** This system allows the staff to retrieve customer information, conduct transactions and collect payments.

- **Reporting and Analytics Tools:** These tools help managers track key performance metrics such as response times, call volumes, customer satisfaction rates, and other data to identify areas for improvement and optimize contact center operations.

- **Quality Monitoring and Training Tools:** These tools monitor customer interactions and provide feedback and coaching to agents to improve their performance and customer satisfaction.

People – Road Map Planning Model

People
- Staff
- Governance

People are critical for
- Preparation
- Delivering services
- Improving operations
- Overall management and governance

Customer

Channels

| Field Office | Phone | Video Conf | Social Media | Chat | Email | Phone IVR | Web Site | Portal |

Tools

Reporting & Analytic Tools

- Interactive Voice Response
- Contact Routing & Queuing
- Agent Workstation
- CRM
- Knowledge & Learning Management
- Staff Consultation
- Vehicle & Driver Management

Quality Management Tools

People

- Staff
- Governance

Any strategy must assess the present state and define the future state. The model is a tool for describing change.

Present State
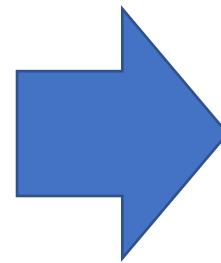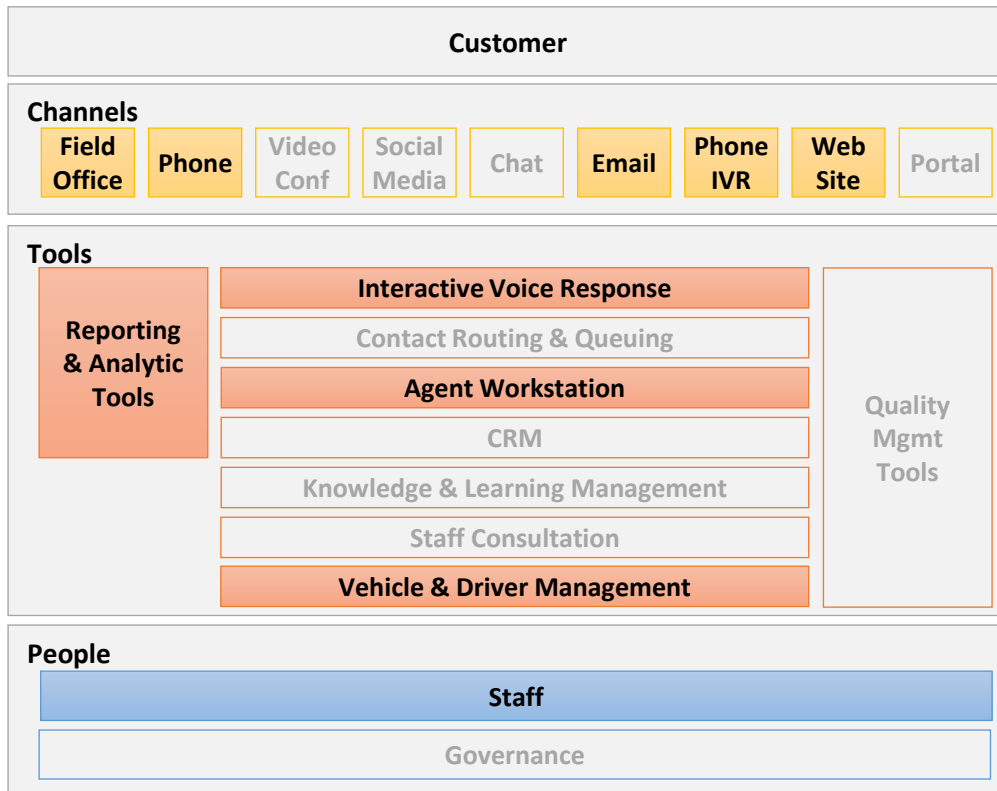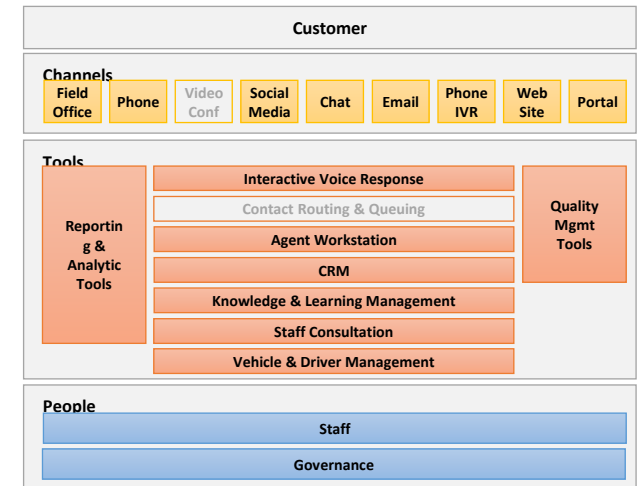
Future State
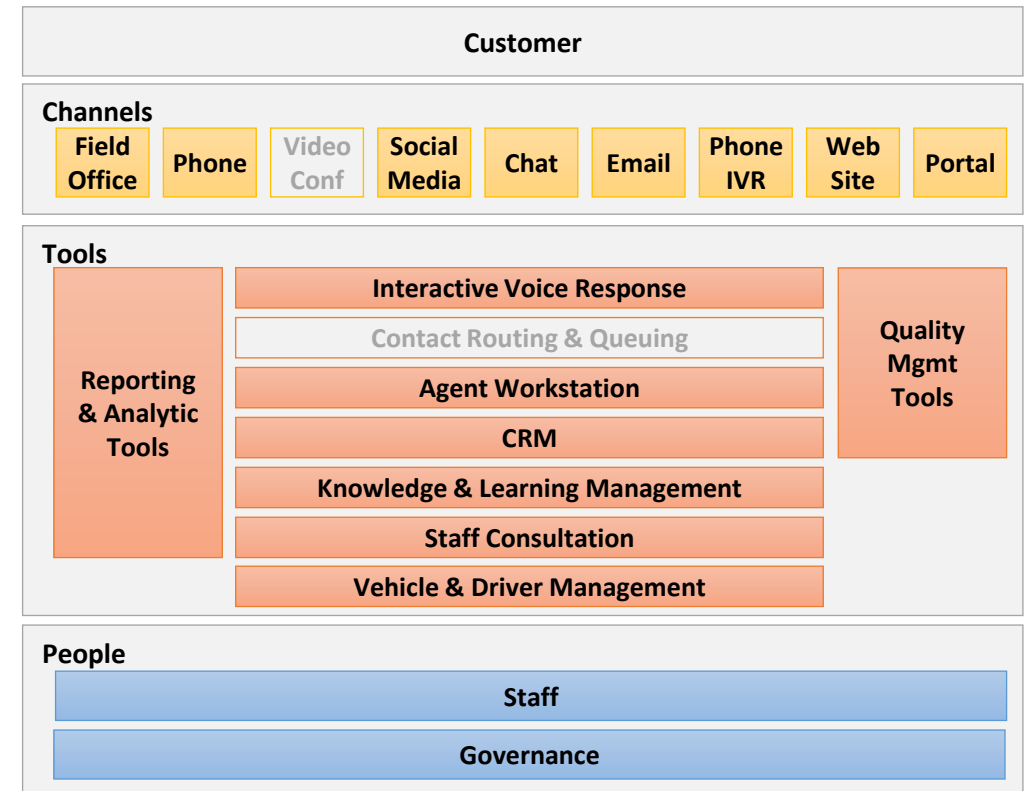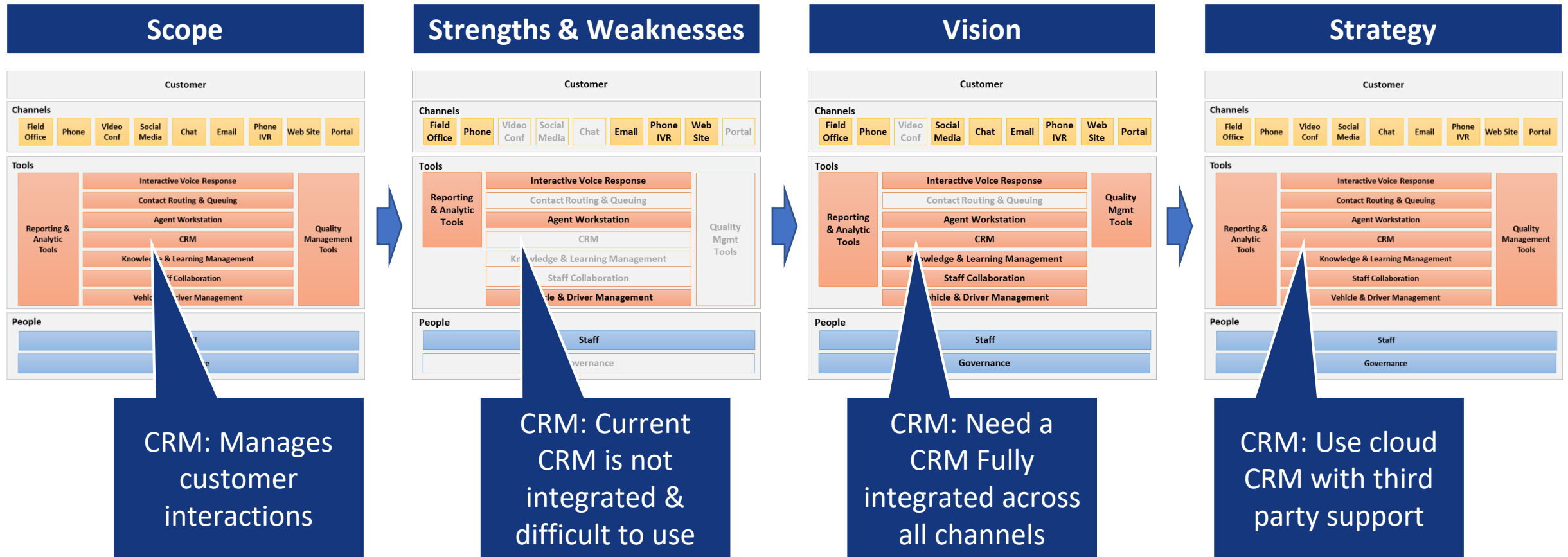
The strategy may have many phases…
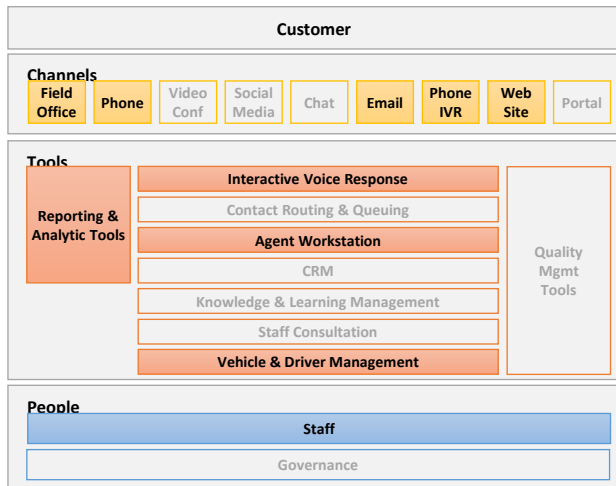
Present State → Next State → Future State
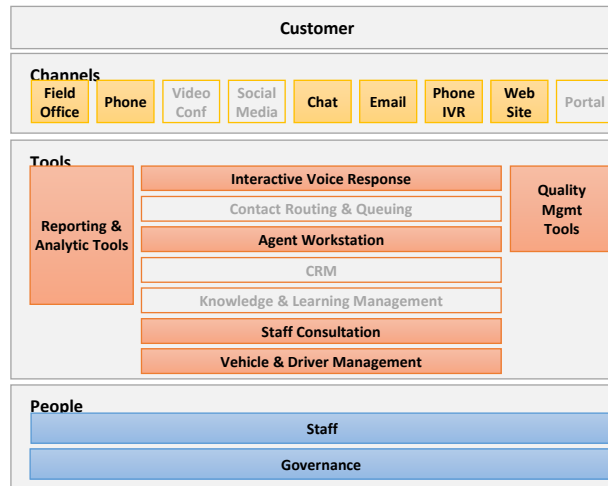
The model also provides a framework for organizing important planning concepts and describing how and why we will change.

Scope — CRM: Manages customer interactions

Strengths & Weaknesses — CRM: Current CRM is not integrated & difficult to use

Vision — CRM: Need a CRM Fully integrated across all channels

Strategy — CRM: Use cloud CRM with third party support

Develop a **Focused Transformation Plan**
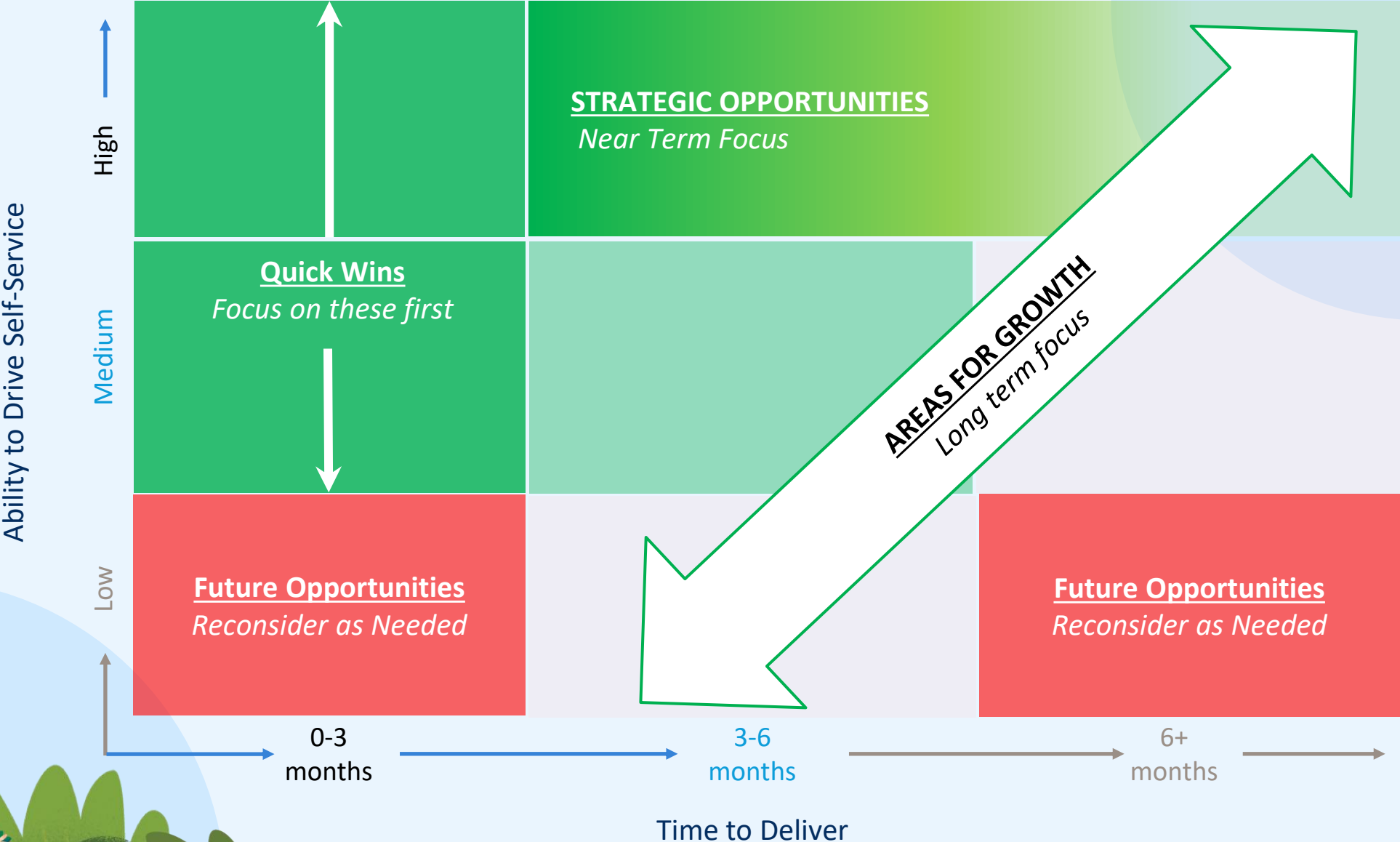
Example: **Transforming** the DMV Customer Service Experience

Leverage an incremental approach to modernization

AAMVA
American Association of
Motor Vehicle Administrators

Emerging

Secure Portal

Customer 360 Profile

CTI Integration

Chatbots/Live Chat

Knowledge Management/FAQs

Multi-Lingual Support

Operational KPI Management

Optimizing

Customer 360 Agent Console

SMS, Email

Call Back Options

Customer Satisfaction Tracking

Personalized Campaigns

Agent Scripting & Actions Guidance

Trend Analysis

Leading

Social Media

Personalized Journeys

Real-time Call Transcription

NLP Machine Learning

Predictive Modeling

Cross-Team Collaboration

Digital Engagment Analytics

Driving Results

⬇ Average Hold Time   ⬆ Customer Satisfaction   ⬆ Online Service Adoption   ⬇ Time to Issue Resolution

⬆ Call Deflection   ⬆ Time to Value   ⬆ Agent Productivity   ⬇ Services & Support Costs

The Road to Digital Engagement

• STEP 1 •
Launch a Plan Ahead Team

Prepare for the next stage with a team focused beyond the day-to-day

- ✓ Small Core Team of IT & Program Experts (e.g. Program Architect, BA, UX)
- ✓ Commitment to Digital Transformation
- ✓ Capabilities Rather than Things

• STEP 2 •
Build the Transformation Pathway

Build and execute a concise action plan focused on digital engagement

- ✓ Employees & External Stakeholders
- ✓ Three Overlapping Phases of Transformation
- ✓ Trigger Points Over 12 Months

• STEP 3 •
Identify Criteria for Priorities

Identify both immediate and long term drivers of need for transformation

- ✓ Identify Quick Win, High Value Projects
- ✓ Create a Prioritized Backlog
- ✓ Develop Necessary Business Case & Justification

AAMVA
American Association of
Motor Vehicle Administrators

THANK YOU

Questions?

syoung@mathtechinc.com
christine.quinn@salesforce.com