



# Overview

The modern call center and sales agent faces pressure from all sides to perform. They want to keep clients and customers happy, while also meeting or exceeding sales and support goals—often while managing multiple channels of communication, perhaps even at one time. A recent report from [McKinsey & Company](#) discussed how the nature of customer care is changing so that customers have become increasingly comfortable with self-service tools. The remaining live support interactions have become more difficult and complex to resolve, absorbing more time and resources and requiring highly-knowledgeable and experienced agents to support them.

Despite these challenges, customers continue to have high expectations for prompt and reliable service. Many consider customer service the top reason they are loyal to one brand or decide to purchase with one vendor versus another. It's therefore critical that managers set their team up for success before they pick up the phone or answer a live chat. Yet despite this demand, many contact centers don't know in the moment what inspires customers to call them—so they end up providing reactive support, as opposed to proactive.

The benefits of boosting your contact center's performance extend beyond customer satisfaction, though. The contact center that is efficient and empowers their agents to succeed stands to reduce overall operating costs, increase sales, and also improve their company culture and employee retention.

## GOALS:



To achieve both—efficiency and a standout customer experience—contact centers should equip their agents with tools that empower them to anticipate client needs and reduce the amount of time to service their request. Tools like: call transcriptions, intelligent automated routing, and session data that pulls in information from other essential platforms your business uses like Salesforce or Google Ads to give your agents important context when interacting with customers. Manager tools like live coaching and whispers, the ability to join or take over an active call, and real-time agent performance reporting, are also key to enhance performance.

In this guide, we'll review the essential features and tools for the modern call center to have and discuss how to implement them in order to drive success for your team. We'll explore areas to improve upon to drive performance, including:

- Anticipating customer needs
- Delivering service across multiple communication channels
- Coaching for sales and support success

We'll also share the specific tools CTM provides as the only contact center solution with marketing attribution data built in—an essential component for leveraging customer data for alignment and growth across your organization.

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## PART ONE:

# Anticipating Customer Needs

Are you ready to stand out as a customer-driven business? Then it's time to go beyond the basics of "the customer is always right" from the old service rulebook.

You need to be thinking two steps ahead for how you can delight your customers, before they even ask for it.

Tools such as effective IVR menus, intelligent automated routing, and personalized communication flows, allow you to proactively address your customers' needs and avoid frustrating bottlenecks in the call center infrastructure.

## Build a User-Friendly IVR Menu

“I like waiting on hold” ... said no one ever. Having to wait on hold or go through multiple agents to get an issue resolved and repeat your needs again and again is a surefire way to frustrate and possibly even lose a customer. A quick solution for the call center is setting up an IVR, or interactive voice menu, that allows customers to keypress choices and skip unnecessary steps to get help. Most businesses will set these up because they save time and resources. In some settings, a good IVR menu can replace the functions of a human phone operator.

However, from the customer’s perspective, an IVR can also provide a negative experience. Poorly constructed IVR menus can make customers feel “trapped” in an endless series of choices, with no clear option to speak to a human being. So, how do you take advantage of the benefits of an IVR, without frustrating your callers? Here are our tips to help you build the perfect interactive phone system.

# 1.

### **Reduce the time your callers spend listening to irrelevant information.**

Determine and prioritize the most common reasons that customers call your business up front. If the majority of your callers are reaching out to ask if you’re currently open, offer an option to hear the hours of operation first, and not after eight other keypresses that are rarely chosen.

# 2.

### **Don’t leave your callers languishing in an endless chain of menu options.**

It’s crucial to ensure that no matter which choices a customer makes in your IVR menu, they’re able to speak to a human being when necessary. There’s probably nothing more frustrating for a caller than to reach the end of a menu branch, exhausting their available choices, without ever reaching an option that feels appropriate to their needs. And without a path back to the broader set of choices available in an earlier part of the menu, they might be forced to hang up and start the call all over again. Imagine how irritated that caller would be once they finally got on the line with a live agent! It would be nearly impossible for that experience to end well, for both the caller and the unwitting agent, no matter the level of service ultimately provided. Interspersing the option to speak to a live agent during operating hours, or at least leave a voicemail after hours, will help prevent your callers from feeling like the IVR is a system they need to “beat.”

# 3.

### **Ensure your IVR system is voice responsive.**

Despite the terminology, many IVR menus are only set up to react to keypresses, not voice commands. Voice-powered virtual assistants have surged in popularity in recent years, so consumers have grown to expect digital systems to react—and react accurately—to their voices. If your menu only offers “press one for sales” versus “press one, or say SALES, to speak to a salesperson,” then you’re not delivering the best service to your callers.

# Implement Intelligent Call Routing

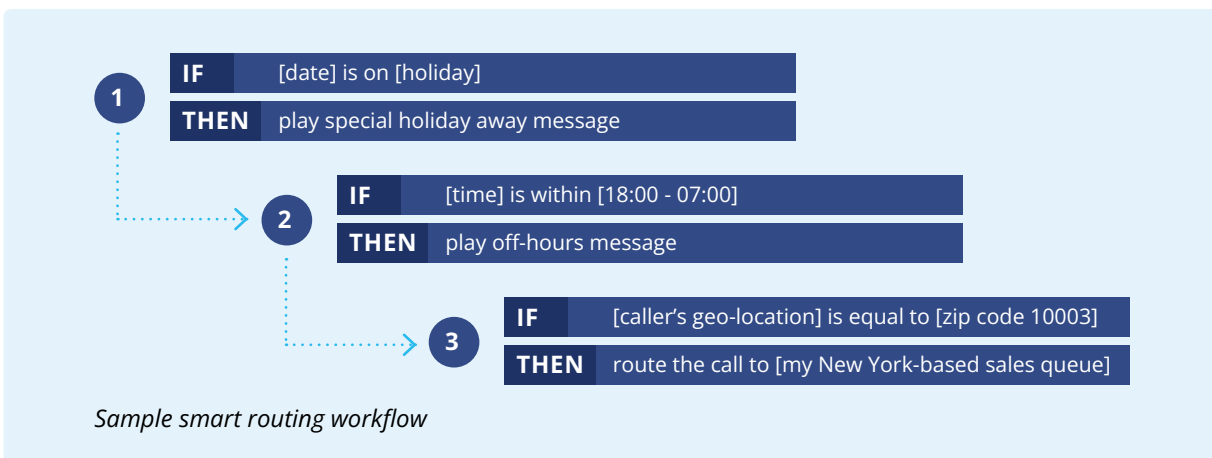
Before your callers even reach the IVR menu, however, consider how efficiently they're being routed there. You can reduce friction for your customers and increase conversion rates by routing incoming contact requests to the right agents with as few transfers and as little wait time as possible.

Automated intelligence tools allow you to automate routing based on customizable agent queues, caller location, agent availability/schedules, and more. Use the caller's recent activity to decisively route them where you want them so they get to the right agent from the start, eliminating pointless intermediary contacts.

Smart routing allows you to conditionally direct sales and support contacts based on:

- ✓ Actions the customer has taken on your website
- ✓ Whether they've previously contacted your business
- ✓ Which agent they last interacted with
- ✓ Custom criteria unique to your business needs
- ✓ The geographic location nearest to your customer

Leveraging automated intelligence tools, which may have once seemed like a big investment of time and resources to set up, is now an operational necessity for businesses of any size or scope. Implementing automated routing and workflows for your routine calls and activities frees up your marketing, sales, and support teams to act strategically instead of getting bogged down by manual tasks, allowing for increased revenue, greater productivity, and reduced time to conversion.



Automate your outreach to prospective customers, too, with use of smart-dialer software. Drive productivity and save on resources for your team by automating your call center's outbound calls based on criteria and timeframes that you customize. Define rules and milestones in your smart-dialer so you can strategically manage calls in line with your team's availability and caller behavior. You can even nurture or re-target a particular segment of your database and layer in custom follow-up communications, such as a text message two days after a call, to deliver results.

## Customize Your Communication Flow

Queues are an important component of building your automated communication flow. Queues allow you to choose how calls are routed between your teams so you can assign each agent their own availability schedule, weighting, and preferences so they can easily address calls in line with their own objectives. This allows you to prioritize and proactively address customer concerns with agents who are prepared to handle their specific inquiries. In a queue, each agent knows what they are responsible for so they are better equipped to deliver a good customer experience.

At the same time, ensure critical actions take place while conserving your agent resources. The right call center solution will allow you to define logic or trigger certain actions to occur when needed. For example, identifying high value customers by automatically appending a score or conversion when a call meets certain criteria, such as talk time, advertising campaign, or words of intent spoken on the call, so your agents don't even have to lift a finger.



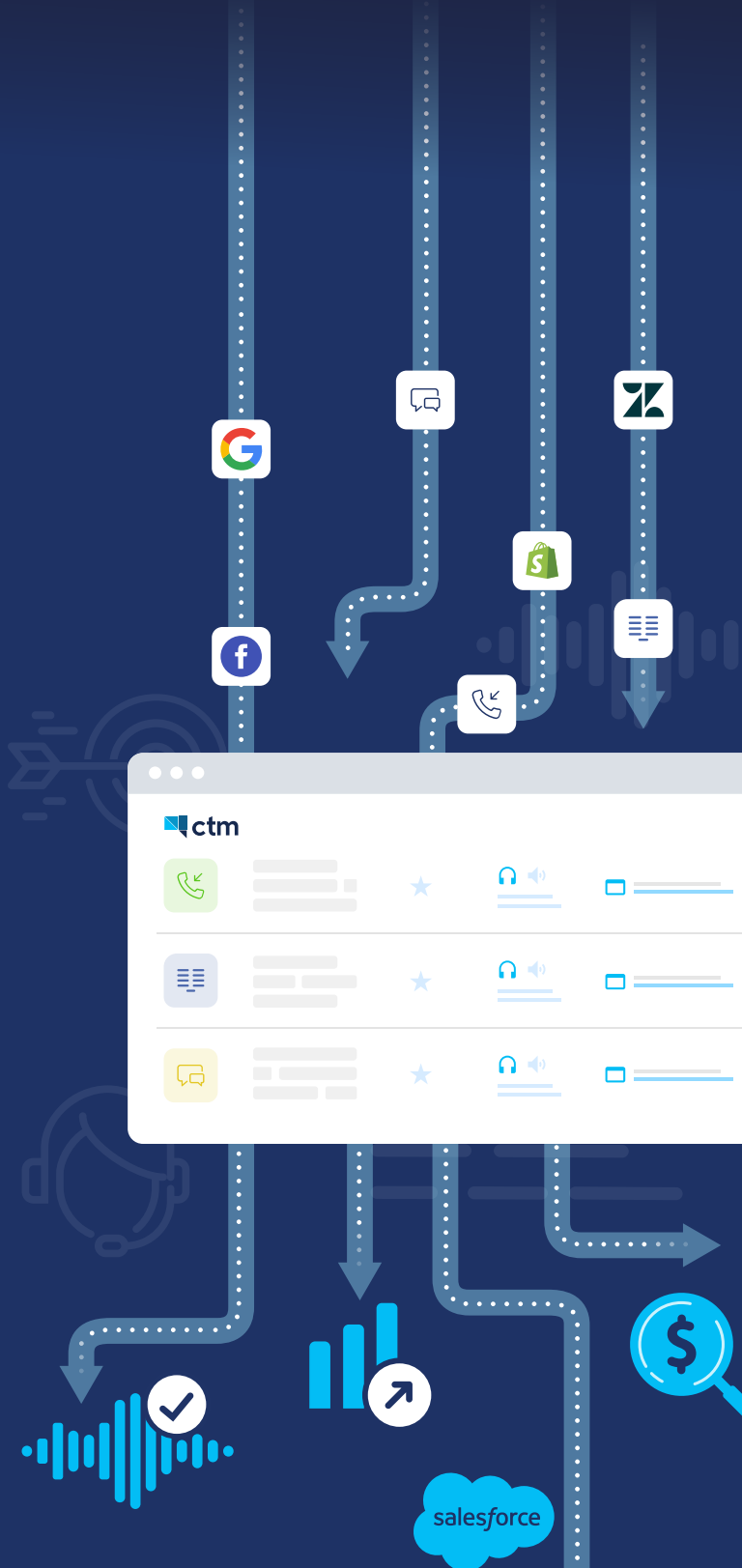
CTM offers a specialized Teams function, which enables you to customize a queue group's access level, settings, specialized softphone functions, and even custom wrap-up panels.

## Build Upon Conversation Intelligence

For call centers, CTM offers a unique blend of marketing attribution and contact center tools so that your marketing data informs your customer conversations in real time. Through the use of unique tracking numbers or our intelligent FormReactor tool, which embeds web forms onto your site, we can provide you with insights about the customer such as session data and advertising campaign to better tailor the conversation, and then build upon that intelligence in real time.

For example, a home services provider with multiple offerings could automatically route callers to the team fit for their needs based on their most recent web activity; say, if they were viewing pest control pages, they would automatically be routed to that department. Everything is automatic, making it painless for customers and helpful for your agents to provide the support they need instantly because they'll know exactly how the customer was directed to them.

CTM also integrates with other essential platforms across your organization's toolkit, such as Google Ads, Salesforce, Facebook, and more. Sync critical customer information from your CRM or service platform into CTM, so your team has all the details they need to assist customers and close the sale right in front of them.



## PART TWO:

# Delivering Service Across Multiple Communication Channels

Today's consumers don't just have the phone to contact a business; many organizations now offer multiple channels including text messaging, form fills, email, social media outreach, and live chat. And the expectation is that you'll get the same level of service, no matter which method you choose.

Ultimately, every customer will have their own way they prefer to communicate, which goes to show that an integrated approach is often best. By offering a combination of all these tools, you'll ensure you're appealing to the needs and preferences of a variety of audiences.

# 73%

of customers prefer live chat to resolve support inquiries

[Source: SuperOffice](#)

# 50%

of companies report online forms as their highest converting lead-gen tool

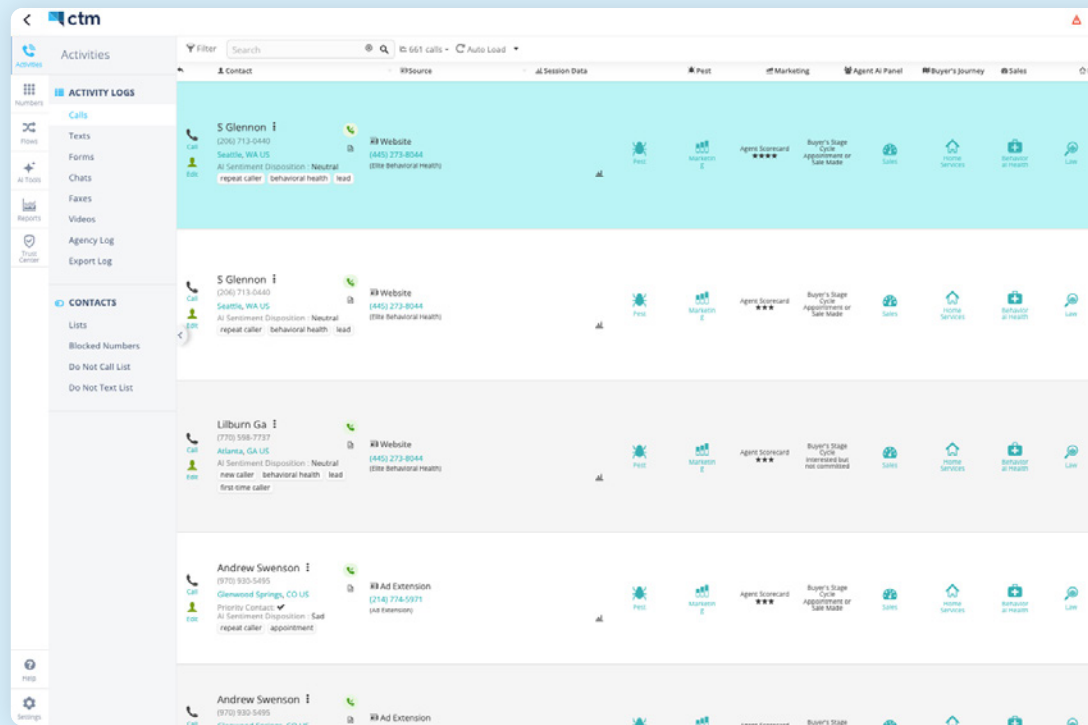
[Source: HubSpot](#)

# 90%

of text messages are read within three minutes

[Source: VentureBeat](#)

How do you help your team prioritize and optimize the customer experience by channel? For one, it helps to align these various channels within one tool, like CTM which offers phone, text, forms, and chat all in one platform. This helps you achieve a birds-eye view into all the conversations happening across channels within one activity log.



CTM Activity Log

Instead of thinking of ways to provide a stellar phone experience versus a chat or text message experience, you'll want to focus on unifying your messaging and service experience across your different communication channels. By adopting an omnichannel engagement strategy, you help eliminate any disconnect customers may feel in interacting with your brand via different methods, and provide a seamless, consistent experience no matter how they choose to contact you.

While it's more expensive and takes time and resources to invest in coordinating your communication strategy across channels, adopting an omnichannel strategy will elicit higher ROI over time because you will gain deeper insights into all the touchpoints customers have with your brand and deliver a stronger customer experience.

We could write a whole other e-book on how to deliver stellar service across communication channels (and in fact, we did). Check out our guide to [Build Your Omnichannel Communications Strategy](#) to discover the benefits and challenges of adopting an omnichannel communications strategy and the power of unifying messaging to create a seamless customer experience.

## Scale with Remote-Friendly Service Tools

When it comes to scaling your call center, whether from a five person team to five hundred, it makes sense to do so with a cloud-based platform. Traditional desk phones are expensive and difficult to configure, especially for growing organizations with a nationwide or global footprint. Consider implementing a softphone like the one offered through CTM to help your team provide service from anywhere in the world. This gives your team the option to work from home when necessary, and for you to grow your organization at a fraction of the cost.

A softphone is simply a phone powered by the internet, so you can make calls from your laptop, desktop, or any device. For the more technical among us, a softphone is embedded software that enables voice over Internet Protocol (VoIP) telephone calls. VoIP phones can look just like other office phone systems that sit on a desk, but softphones are browser-based or mobile apps.

For call center agents and managers on the go, it also helps to be able to access your tools via mobile app. This way, you can manage and stay on top of customer contacts directly from your cell phone so you are always in reach.

### Softphones versus traditional business phone systems

Choosing between a VOIP softphone and a traditional desk phone might come down to preference. But there are some significant differences between the two to consider:

#### COST AND SCALABILITY

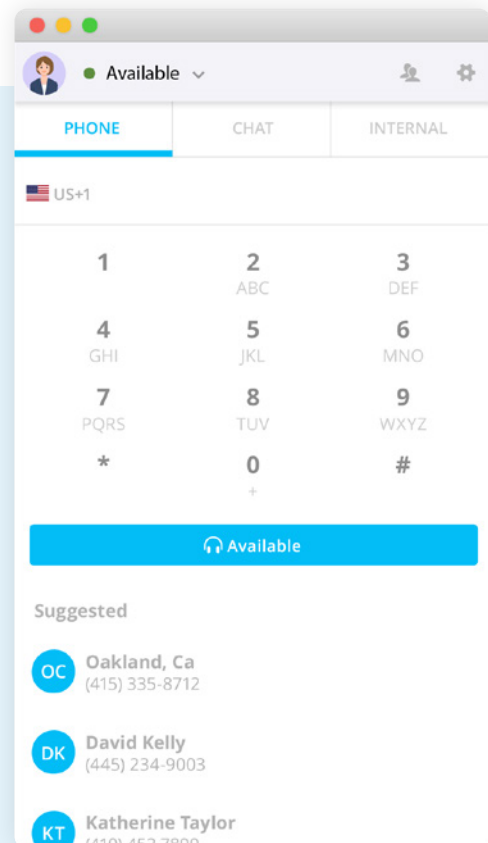
There's no incremental cost to adding a new employee to a softphone, unlike purchasing an expensive desk phone.

#### FLEXIBILITY

Need to work from home? For the softphone, just log in from your new location. It's much harder to move the hardwired phone.

#### IMPLEMENTATION

A headset with a microphone and the internet is all you need to start using a softphone. It's much faster than configuring hardware.



## PART THREE:

# Coaching for Success

Interacting with customers all day is not an easy job.

Call center roles are subject to high turnover and job dissatisfaction—especially if agents do not feel properly supported. Of course, it all starts with hiring the right people.

Nearly anyone can be trained on a process or piece of software, but employees with soft skill sets, like empathy and quick thinking, are a necessity for customer-facing roles. But once you've got your team in place, it's crucial that you support them and give them the tools to perform well.

Manager tools are an essential component of the success of a contact center solution. You want to be able to monitor your agent's performance in real time, and also have the ability to jump in and assist in conversations when needed.

Supporting your team can also mean training them around how to sell over the phone and incentivizing their success. The bottom line is that these conversations your agents are having with customers are critical: they are on the front line, driving sales and conversions for your business, with many of those critical conversations happening over the phone.

Key tools to implement for improving agent performance:



#### LIVE LISTENING

Assist your staff on calls with the ability to coach, join, or end calls. This is especially helpful for new employees who may need an extra hand on calls, or even for more seasoned agents if they come across a difficult customer.



#### CALL SCRIPTS

Arm team members with scripts that provide custom messaging for clear, consistent communication.



#### BARGE

Intervene when necessary and take control of a call to remove the current agent without requiring a transfer. Provides a seamless experience for the customer since they do not have to wait on hold.



#### CALL WHISPERS

Speak to agents during an active call without the caller hearing you. Provide real-time feedback or suggestions to that agent to coach them through the call.



#### CALL TRANSCRIPTIONS AND RECORDINGS

Provide records of past calls to train new employees or use it as a coaching tool with existing agents to improve performance and demonstrate how to handle various interactions.



#### KEYWORD SPOTTING

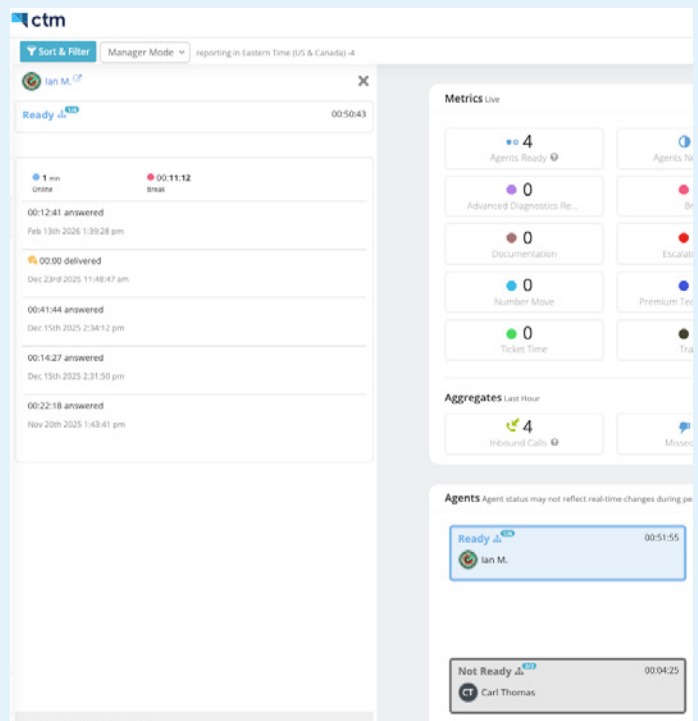
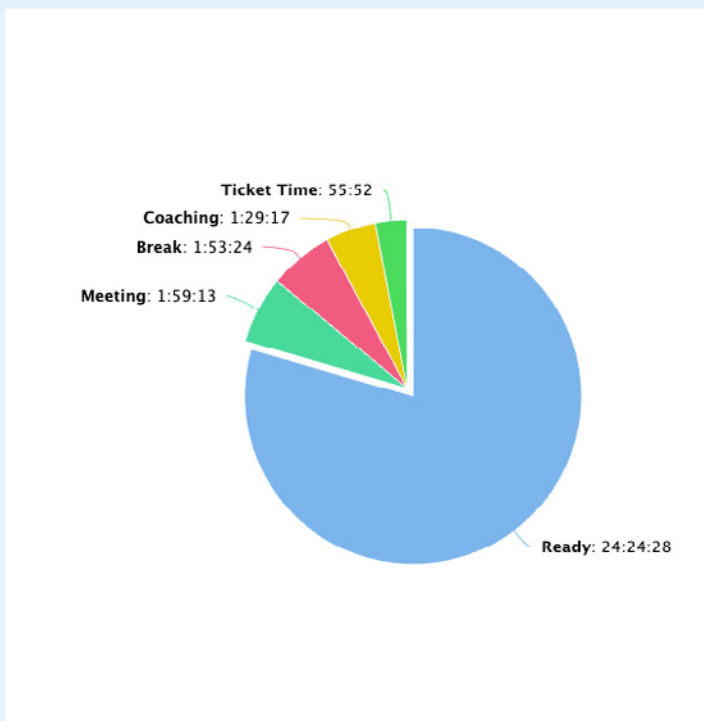
Identify when certain words are spoken on a call to understand content and intervene when necessary, such as if the word "manager" is spoken.

With so many tools to visualize the content of what's being said on your phone calls, consider offering intermittent incentives to motivate your team to drive more sales. You can monitor this through scores as well as keywords mentioned on the phone and review call or chat metrics throughout the period.

## Monitor Performance with Live Reporting

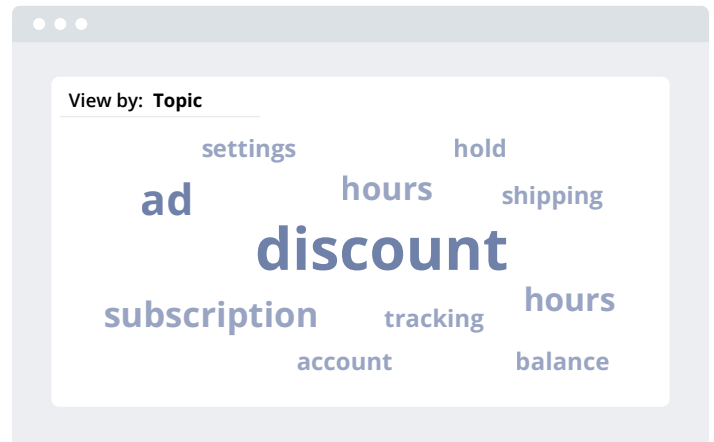
If you're a contact center manager, you're keenly aware of the need to manage your key performance indicators. Close monitoring of KPIs will very often determine the success or failure of your team. Stats like Average Hold Time (AHT), Average Talk Time (ATT) and Service Level, are commonly tracked daily, even hourly, amongst call center supervisors. Being able to drill down into those specifics by agent to monitor the number of calls taken or missed, calls that generated conversions or solved issues, and average time spent per call in real time, helps you make important decisions about how your calls are distributed and handled. CTM offers a live performance dashboard where you can view at a glance if there are calls waiting for agents, which agents are available, and which agents are currently engaged in calls.

- ✔ Know when your agent is on a break versus taking calls or chats
- ✔ Analyze how your agents perform amidst high or low volumes
- ✔ Balance your understanding of key metrics like ring time and talk time against agent availability
- ✔ Discover your top performing agents, and use live training tools with agents needing further support



CTM Realtime Agent Dashboards

CTM also offers a “word cloud” feature that allows you to easily surface the most common words spoken on customer calls, helping you derive insights and analyze trends in your conversations over time or during a particular period.



## CTM Success Story

# 25%

## AHT reduction

The “Agents” view in the Real-Time Agent Dashboard provides me with both AHT and ATT for the group and the individual agents. We had found that our answer times were increasing, so I started reviewing the AHT and ATT reports closely.

The information I gathered there led us to take another look at the call distribution method we were using, known as “simultaneous” call distribution. Since then, we’ve switched to the “longest waiting” call distribution method, and the initial results are promising: we’ve recently experienced a 25 percent AHT reduction!

**Frank Roberts, Sr. Director, Technical Support**



The modern call center faces many challenges, from resources and staffing to managing customer expectations and satisfaction across multiple communication channels. The right tools are essential to help your team succeed and drive revenue for your organization. Often, what's most impactful though is the ability for other teams to mine insights from what's happening in your customer conversations. This is where a conversation intelligence tool such as CTM becomes invaluable.

CTM provides the marketing attribution data for your contact center to proactively view who is calling your company, what campaigns they were referencing prior to contacting you, and their history of interacting with your company. Partnering this data with call management tools to automate and streamline your team's workflow, all within one platform, frees your agents up to focus on delighting your customers. You can then bring this information full circle for your company through powerful integrations with Salesforce, Microsoft Dynamics, and other top marketing automation and support platforms. Achieve more conversions thanks to increased visibility into what's driving phone calls, texts, form fills, and chats—and how you're managing them. You'll start uncovering patterns and finding actionable insights from every interaction.

When your team is able to work smarter, not harder, you make it possible to truly wow your customers. Discover how contact centers like yours have utilized CTM to automate their internal processes, drive stronger team performance, and improve the quality of their customer interactions.

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