



# Using Intelligence to Transform Conversations



# Contents

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Using Intelligence to Transform Conversations	1
The Challenge	2
The Opportunity	3
Structuring Calls For Best Practice	4
Enabling Advisors To Focus on Conversations	5
Applying Intelligence For Dynamic Call Flow Navigation	6
Personalising The Interaction	7
Enabling Intelligent & Effective Self-Service	8
Summary	9
About Omfax	10

# Using Intelligence to Transform Conversations

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For almost a quarter of a century, Omfax has been helping the social housing sector to improve the way they communicate and deliver an effective service to their residents. During this time, residents' expectations around customer service have continued to evolve and increase, while so too has the pressure on the social housing landlord, who has to control costs and deliver customer service more efficiently.

This document is aimed at providing social housing organisations with practical advice on how to improve the way they interact with their residents and is based on proven approaches that have been taken by our clients using Keyfax Inter•View Dynamic Call Flow Navigation. We strongly believe, and our customers have shown this, that by transforming conversations with residents, it is possible to transform customer relationships and service delivery.



# The Challenge



According to the Institute of Customer Service, 63% of all UK citizens currently prefer to phone an organisation for customer service queries and within social housing this percentage is likely to be higher. Yet only 25% of citizens are satisfied with the service that they receive. So they either remain dissatisfied or look elsewhere. Online self-service options are therefore becoming increasingly popular but it is estimated that 49% of calls are too complex for this channel.

Two important facts are revealed by this: firstly, the contact centre continues to play a critical role in engaging with residents; and secondly, it clearly shows that despite the significant improvements that social housing landlords have made around customer engagement, service delivery is still perceived to fall short. At the same time, we know that increasing numbers of residents are looking to deal with many straightforward issues and transactions using an internet service.

How citizens benchmark the service they have received is central to how we have reached this point, which is very well articulated by Jo Causon, Chief Executive of the Institute of Customer Service: "When customers reflect on services they have received, they tend to apply the same criteria. It does not matter whether the supplier is a FTSE100 business or their local GP surgery."

It is no longer sufficient to be better than you used to be; residents are looking for customer service on a par with their bank, their favourite retailer or travel company. The challenge, or opportunity, is how to deliver that level of service efficiently, whilst still achieving good value for money.

# 63%

of Citizens currently prefer to call for customer service

Source: UKCSI 2012, Institute of Customer Service

# 49%

of calls are too complicated to execute through internet self-service. These require advisors with the time and knowledge to handle them.

Davies/Hickman 2013



## ONLY 25%

of UK Citizens are satisfied with the customer service they receive from the public sector.

Ipsos Mori poll  
December 2012

# The Opportunity

The factors that residents regard as important to a good customer experience are, in fact, the same drivers that lead to efficiency and productivity in the contact centre, i.e. first call resolution, shorter call times, no transfers and not having to repeat information; and to meaningful service on-line i.e. easy to use, pertinent to the enquiry and relevant to the customer.

When housing organisations focus on the following four factors, we have seen that they are able to achieve much more with less, improving customer service while becoming far more efficient.

**Optimum Call Flow** – a call is a process; by navigating the call through the optimum path, the right outcome is generated far quicker.

**Smart Conversations** – aimlessly working through a list of questions causes confusion and errors; let the answer given dictate the next appropriate question, based on expert guidance, and avoid forgetting to ask pertinent questions.

**Personalised Conversations** – calls are not transactions; they are interactions with residents and an opportunity to build and strengthen the landlord/resident relationship by referencing the information and history of contacts that already form that relationship.

**Intelligent & Complementary Self-Service** – treat as another form of conversation, equally broad in its range and capacity and apply the same best practices as for verbal conversations.

## Contact Centre Factors Affecting Customer Satisfaction

72% - First Call Resolution

71% - Polite and Friendly Agents

48% - Short Queue Times

29% - No Call Transfer

23% - Short IVR Menus

12% - Short Call Times

10% - Long Opening Hours

Source: Contact Babel –  
The UKContact Centre  
Decision-Makers' Guide 2012



1 in 2 citizens think it takes too long to identify them.  
Davies/Hickman 2013

  
60%

of citizens stated they get angry when kept waiting unnecessarily by public sector organisations.

Ipsos Mori poll December 2012

51%

of citizens say they are irritated at having to repeat information to different people

UKCSI 2012, Institute of Customer Service



# Structuring Calls For Best Practice

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There are three factors that influence the structure of a call:

- i. The way in which the caller describes their situation or query
- ii. The advisor's understanding of the information required
- iii. The order in which the underlying systems require information to be entered.

Aligning these three factors is vital in creating the optimum call flow which produces the right outcome in the shortest time, whether the call is to the contact centre or online.

This is where Keyfax Inter•View Dynamic Call Flow Navigation plays a significant role. Much like satellite navigation in a car, it provides the advisor with step by step instructions as to the optimum way to get from A to B, and takes account of circumstances identified along the way.



## Logical Call Flow

With Dynamic Call Flow Navigation it is possible to define the optimum call flow for each type of call, taking into account the best way for the caller to convey information and the necessary information needed to determine the correct response. By understanding what the best call flow actually is, and then embedding this into the front-end system used by the advisors or by residents, it is possible to ensure that not only is the optimum call flow followed each and every time, but importantly that there is consistency in the way service is delivered.

## Interactions Versus Transactions

Many interactions require a process to be initiated or a transaction to take place; for example, a payment to be taken or a housing repair to be scheduled. This can create a conflict between the way information is required to be entered into the housing management systems, and the optimum call flow that best suits the resident. By utilising Dynamic Call Flow Navigation, this can be resolved with the front-end system collating information in line with the flow of the conversation, and then posting this in the appropriate way into the back-end system.

By simply implementing Dynamic Call Flow Navigation, social housing contact centres are able to reduce call durations, improve the accuracy of information received and passed into management systems and increase the number of first call resolutions. Making the same system accessible online, correct and relevant information is available to residents at a time that suits them and subsequent service requests can be accepted with confidence.

# Enabling Advisors To Focus on Conversations

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Calls into the contact centre are increasingly more complex and advisors are expected to handle a much broader range of enquiries. Yet at the same time, the resident places a high expectation on the advisor being knowledgeable and able to answer every enquiry first time. The growing interest and provision of self-service is filtering off more straightforward enquiries, so the complexity of calls to contact centres can be expected to increase.

This is an increasing challenge for social housing contact centres and one that more advisor training alone will not be able to resolve. A distinction is required between the skills that the advisor requires to provide excellent customer service, and the subject matter expertise that they require to answer any possible enquiry they could receive.

Going back to the analogy with satellite navigation, the driver is not expected to know every road in Britain, only how to drive. So, with Keyfax Inter•View Dynamic Call Flow Navigation, the knowledge and expertise is built into the system, enabling the advisor to focus on the conversation with the resident.



## Different Enquiries/Different Call Flows

Different types of enquiries require different structures in order to achieve the optimum call flow. With Dynamic Call Flow Navigation, the resident and the advisor are always guided down the optimum flow by taking into consideration the type of enquiry.

## Policy Guidance

With Dynamic Call Flow Navigation, there is no need for the advisor to have to know every policy and how these should be applied. The system guides the conversation and provides the advisor with the appropriate policy interpretation and ensures that this is always applied consistently.

## Specialist Guidance

Where detailed specialist or technical knowledge is required, this can be provided by the system, which significantly reduces the amount of calls that have to be referred to an expert.

This approach allows training to be directed towards customer service and communication skills and enables advisors to focus much more on the conversation they are having with the resident, rather than looking for the piece of information/knowledge that they require. More calls are resolved first time and residents feel they are receiving a knowledgeable and consistent service.

# Applying Intelligence For Dynamic Call Flow Navigation

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We have discussed the use of Dynamic Call Flow Navigation to transform the conversation, ensuring optimum call flows and that advisors are knowledgeable. The next step is using the available data to provide contextual guidance.

This means using information known about the resident, their property and their tenancy, to deliver a more focused service aligned to their needs. For example, to ask a question regarding dependents of an elderly resident living alone is neither appropriate, nor demonstrates any relationship between landlord and resident.



## Asking The Right Questions

As a call progresses, Dynamic Call Flow Navigation is able to use the information collected, such as residents' details and the nature of their call, to extract knowledge from supporting systems. By knowing who the resident is and the fact that they are having issues with, for example, their heating, information on the particular type of heating system installed in their property can be retrieved and used to more accurately and efficiently guide the questions to be asked.

## Collecting Complete Information

This level of intelligence not only helps with the call flow, but enables information to be gathered during the call that will assist with the follow-up action. For example, knowing that a tenant is in arrears with their rent and is affected by the changes in Housing Benefit, although their call is about their heating system; or knowing that their particular type of heating may need additional information for parts to be pre-ordered before a repair can be done. Having this sort of knowledge during the call can ensure that all relevant information can be collected, that necessary action and assistance can be initiated, and remove the need for a further call or a wasted site visit.

## Providing The Right Advice

Contextual guidance also enables thorough and accurate advice to be given every time. Knowing the type of property and tenancy for example, can automatically change the flow and type of questions asked, arriving at the correct answer earlier, and ensuring that the information provided is both relevant and accurate.

By introducing contextual intelligence, a higher proportion of calls can be resolved first time, the residents feel they are being provided with a more personalised service and a far more efficient end-to-end process is achieved. For example, knowing a boiler is in warranty means the landlord doesn't need to pay out for its replacement, or knowing that a direct debit is not set up triggers this conversation.



# Personalising The Interaction

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The final part of transforming the conversation is transforming the relationship. It is not only applying information held on the property to the call flow, it is also personalising the call around the individual resident.

It is immediately identifying that a resident is elderly and lives alone and adjusting the call flow to ensure that you put their mind at ease and allocate the appropriate priority to their issue. It is knowing that the resident has had repeated issues with their heating, so raising the same repair request is unlikely to resolve the issue. It is knowing that the resident calling in with a general enquiry is in rent arrears, and your arrears team urgently needs to speak to them.



## Applying Intelligence To Transform Relationships

Applying intelligence to transform relationships is not presenting the advisor with a screen of customer relationship management (CRM) data; it is using this information to align the call flow to the specific needs of that resident.

To use the satellite navigation analogy again, it is not just giving the driver a route; it is updating them along the way with traffic information and amending the route accordingly.

This level of intelligence is like the resident having their own personal advisor. Although they may speak to a different person every time they call, the advisor has an intimate knowledge of them and guides the call based on their needs, their preferences and their established relationship with the organisation.

## Closer Relationships, More Productive Partnership

Through building these relationships, more productive conversations take place, and a far more effective partnership is built between the landlord and their residents.

# Enabling Intelligent & Effective Self-Service

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The biggest failing we commonly see with self-service implementations is that organisations fail to apply the lessons learned from interacting with residents over the phone to online tools.

Everything that we have discussed so far, is equally relevant to a self-service deployment; being able to guide the resident through the optimum process flow, depending on their particular enquiry, using contextual information about them, their tenancy and property to select the types of questions asked, and understanding the individual and their history to guide the outcome.



## Applying The Same Consistency

Not only is it important to be consistent in the service that you provide from your contact centre and your online self-service applications, it is also key to user adoption. If a resident understands that the questions asked by your advisors on the telephone are the same as the experience online, they will be much more confident to move to self-service, as they will be prepared and capable of answering the questions online.

## Applying The Same Intelligence

Customer service should now be available to residents both in the contact centre and online. Neither service channel should be seen as independent. It is therefore critical that wherever possible, everything that is available through the contact centre should be available online.

The success of self-service is not the number of interactions started online, but the amount of enquiries successfully completed online. Being able to guide the resident through a logical and fully-explained set of questions, exactly as you would as an advisor, is central to online success. It is also ensuring that this process flow is optimised to ask the minimum number of questions, to achieve the best possible outcome.

The more intelligence that is built into Call Flow Navigation, the more intelligence will be available when the service is placed online. The more intelligent and personal the experience, the more likely it is to succeed for both residents and landlords.

# Summary

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No organisation is able to stand still regarding the delivery of customer service. Budgetary pressures mean that housing organisations need to have laser-sharp focus on value for money, and must continually look for ways to deliver more for less. At the same time, residents' expectations on the level of service they deserve continue to grow.

Transforming customer service starts with transforming the conversation; it is about equipping your advisors to achieve the key objectives of efficiently and effectively dealing with enquiries. Fundamentally, it is about transforming the relationship you have with your residents, by turning transactions into real conversations that treat each resident as an individual; where your advisers know your residents and can deal with enquiries in the context of their needs. Finally, it is about making the same service available online for residents to use at a time convenient to them.

By introducing Keyfax Inter•View Dynamic Call Flow Navigation, not only can social housing organisations improve the level of service they deliver in their contact centres and online, but also significantly improve productivity, reduce costs and be far more effective.





# About Omfax

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Omfax Systems is the leading provider of information solutions for customer service within social housing. We offer a portfolio of innovative products and services that bring unrivalled clarity, consistency and efficiency to communicate with residents.

Established in 1989, Omfax has become known throughout the social housing sector for our Keyfax response management software, handbooks, guides and elearning; all created specifically to respond to the communication challenges of social housing organisations, from housing associations to ALMOs.

Our Keyfax Response Management solutions enables social housing contact centres to better serve their residents. By providing Dynamic Call Flow Navigation, Keyfax Inter•View improves the advisors' ability to deal with each and every enquiry, increasing first call resolution rates, improving the accuracy of call outcomes, and helping to reduce the costs of everyday housing maintenance and management.

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