Speeding up front-line customer service

IMPROVING THE CONTENT AND EXPERIENCE FOR AGENTS REDUCES CALL TIME AND CUTS COST

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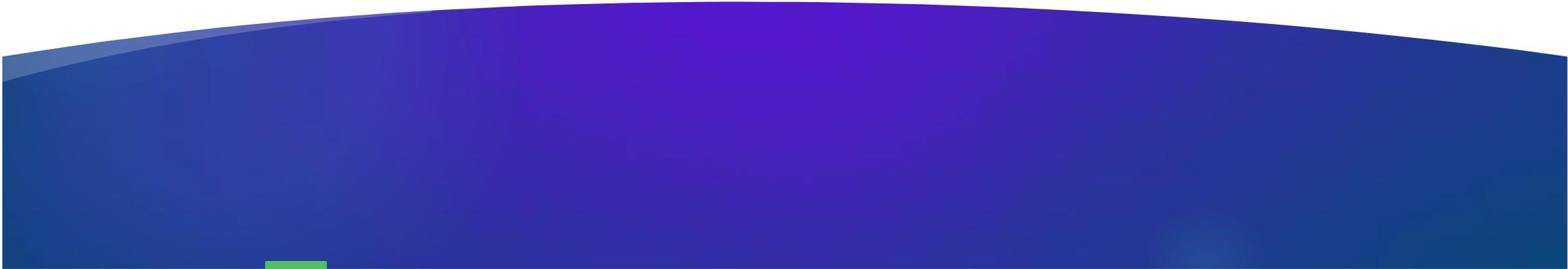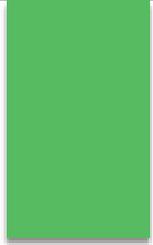
CX/UX is important for internal audiences, too

Knowledge Centre user requirements

- Speed

- Accuracy

- Ease of use

The Customer Experience

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Back to basics

- User research
- IA and navigation
- Taxonomy and metadata
- Templates and style guides
- Writing fundamentals

When the experience is interacting with content, *improving content* improves the experience.

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Before

Set up a new connection

Process Detail

This process is for permanent connections. If the customer wants a connection for construction purposes, see Set up a temporary connection.

If the customer wants to set up three or more meters at one service address, see Set up a multi-development connection order in Gateway.

Verify the caller

1. Identify whether the caller is a customer or electrical contractor and ask for their name and phone number.
   - If the caller is the customer, verify their identity by asking for their date of birth or other personal detail.
   - If the caller is the electrical contractor, remind them that the customer must call to

Related Links

- Set up a temporary connection
- Set up a multi-development connection order in Gateway
- BC OnLine
- Estimate peak demand [PDF, 125 KB]
- Design referrals
- Verify the identity of a caller
- Standard charges for common electrical connection field work
- Overhead and underground declarations

After

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Before

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Perform a credit check

Perform a Canadian credit check

Before performing a credit check, ensure verbal permission has been confirmed by the customer.

1. Sign in to Equifax:

   a. In the **Client ID** box, type **CSR002**.

   b. In the **User ID** box, type your LAN ID.

   c. In the **Password** box, type your password.

   > Note: If you can't log into Equifax, contact the work leader to perform the search. Email CASC, Credit Admin requesting to reset the password.

2. Once logged into Equifax, in the **Session Info** section, click **iDecisionX Cons**.

3. Enter the customer's postal code and date of birth while performing the check.

   - When performing a credit bureau check for customers in 100 Mile House, enter the name of the town/city as **onehundredmilehouse**.

4. Confirm that the correct customer has been located.

- If you have difficulty in finding a customer's credit record on Equifax:

   d. Tell the customer that their social insurance number (SIN) will increase the chances of finding their credit record.

   e. Tell the customer they are not obligated to provide this information.

   f. If the customer provides their social insurance number in order to facilitate a credit check, enter the information directly into the Equifax website only. Under no circumstances should any sensitive customer personal data be written down or distributed electronically.

   > Note: Under no circumstances should credit card information be requested for any reason.

5. Once you submit the credit check, the **Equifax Web Credit Reporting** site will display one of the following replies:

   - **Credit Information Not Available**. The customer must have their account secured by cash security deposit.

   - **Secured Plan Required**. The customer must have their account secured by cash security deposit.

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That all you got?

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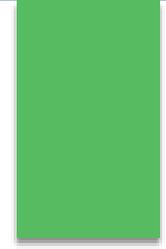
ROI: $240,000 annually

- Elimination of errors and duplicates

- 25% efficiency gains with re-written pages
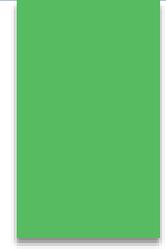
What's next

Lessons learned

▶ Content and structure matters in a knowledge management system.

▶ Process experts and SMEs are not the best people to develop and maintain your knowledge centre.

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Lessons learned

- ▶ Involve the process experts and SMEs in the development of the new knowledge system and structures to get buy in.

- ▶ Simplifying content search and look-up results in more efficient CSRs, happier customers, and cost savings for your organization.

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Knowledge Centre "hacks"

- ▶ Improve page titles
  - ▶ "Reverse a move out" not "Reversing a move out done in error"
- ▶ Create content models and templates
- ▶ Create a glossary; include acronyms

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