

# CCW Vegas 2019 - Helpshift



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*Linda Crawford, CEO, Helpshift.* CRMXchange met with the head of this next- gen digital customer service platform which works with many leading brands to implement messaging, bots, AI and more.

### ***In what ways do you think Helpshift excels?***

We see ourselves as a company that's revolutionizing B-to-C customer support by unifying the customer conversations into a message-first sort of approach. We offer a full platform that incorporates everything from support for the agents and supervisors through to the end consumer. It's a super-modern product, powered by AI and bots providing the full range of capabilities expected of a next-gen customer service platform.

### ***When you say full platform for agents and customers, can you expand on that?***

We set out to build a platform that would offer a great experience for agents. One that performs all the back-office functions such as managing workflows, queues, and service tickets. We also thought about the end customer and how consumers now expect to be serviced, which translates to 'respect my time.' We do that through messaging, whether in an app or elsewhere. For our customers who offer apps, why not service their customers within the app itself and a friendly message-based experience on a website, either mobile or web, integrating the phone into that messaging experience. We've all had situations where you need to talk to somebody at some point even though you're trying to self-serve. Thus, we are bringing the power of automation through bots, then coupling that with AI to improve both the self-service experience and the productivity of agents.

### ***Let's discuss your recent press release about the Connected Customer Conversation. Can you explain what that entails?***

It's unifying everything we do for customers under one umbrella. By connecting digital channels, phone support, self-service, and bots – and by embedding these within a single messaging thread – this platform enables consumers to have one continuous conversation with brands. That translates into providing customers with an experience that respects their time and allows them to switch channels. It also brings every type of interaction regarding support issues into one home and that home is messaging. In our own personal lives, we are using many message-based apps. People are very comfortable with this on-again, off-again experience. Sometimes we're connected and we're rapid fire messaging back and forth to one another and then we do something else because life takes us away, but we have the expectation that at some point if we come back into that conversation, that history of it endures. Whether I sent you a photo or called you, there's some record of that call through the information that exists in the messaging applications. We're now bringing that to customer support and giving consumers that same type of experience. The cool thing is that we can bring in bots powered by artificial intelligence into the conversation itself so that the customer, the agent, and the robotic agent can all work seamlessly to resolve questions much faster to respect the customer's time.

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***Once a customer has started this conversation but gets interrupted by, say an emergency phone call, what happens when they go back in and want to finish what they started?***

In today's live chat applications in that situation you described, you'd have to start over because that window just disappears. Either you terminate or the agent terminates and poof, it's gone. In our world, it's picks up right where you left off. It just resumes when you come back into the conversation. We see that as being pretty magical, and if you've interacted with that brand before, you can just scroll up and see a record of all the other past interactions you've had with that brand.

***If the customer has been in an SMS conversation, could you continue in SMS?***

SMS has its own limitations. Partly because it can cost the consumer something since they are going across a telecommunication channel rather than an internet protocol. It also doesn't have the same state, which is understanding the sequencing of how these messages are all interacting with one another in SMS. The technical term is 'bucketed', sometimes the messages can get out of sequence. With the advent of Facebook messenger, WhatsApp and iMessage, people and companies can get around the limitations of SMS while still offering it as a great notification channel.

***What happens after an SMS conversation if the customer needs to talk to someone?***

Part of the Connected Customer Conversations platform is the ability to move across channels. Imagine if you are placing a call and you are told the estimated wait time is 10 minutes. Some IVRs have the capability to call you back. We can offer another option - would you like to go to messaging? This provides a seamless transition from that phone conversation into a messaging experience where we open a messaging experience on the mobile phone you're using. We bring the context of that conversation from the IVR into the messaging experience. If you've already authenticated yourself by punching in your account number or pressing two for order information or order status, that comes with you into the messaging experience. A human or a bot can pick up right where you left off in that journey on the IVR: If either you or the agent says, 'I think we should just have a live conversation' that can escalate into something similar to click to call. The record of that phone conversation can come back into the messaging experience once it's ended.

***Are there any best practices that you can share about how companies can start to think about how to best use this technology? Are there certain flows that you suggest?***

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We're big fans of the 80-20 rule. Whenever a business is seeking to push automation, it should start with something where the workflow is very well known to the company and where it already has a lot of data. If it's going to use artificial intelligence, a fair amount of data is necessary to train the model. Companies need to find a couple of very common use cases where they have the data and clearly defined workflows which are right for fully or partially automating. Our customers are seeing incredible amounts of situations for automation which create opportunity for either further reinvesting in their contact centers or simply eliminating costs. I've been in this industry for about 30 years, but this is the first time I'm seeing that not only the agents have a better chance to work on more interesting things, customers can have a better experience, and the brands have the opportunity for exponential savings. When businesses hone in on these opportunities, it's amazing to see how few issue types represent the largest chunk of the inquiries that they get.

## ***Is that where a lot of the savings comes in?***

Some businesses are now saying, "Wow, we previously only could afford to staff our contact center 10 hours a day and now we can do it 24 hours a day." It's a combination of the technology with the asynchronous nature of messaging, meaning both parties can pause the conversation. When the brands issue the pause they can say, "We've taken this case so far, we're going to get back to you tomorrow when our agents are back." Customers acknowledge this process and understand when the workflow has started and perhaps progressed three or four steps into an eight-step process. That is one reason why we see customer satisfaction results going up in some cases up by 30-40%. It's also the intersection of these bots in human workflows operating together. Across some channels such as email, bots may improve it to a degree, but not by as high a magnitude as messaging. When going to a live agent or into a human-oriented workflow, there's also only a minor improvement. It's that blend of humans plus bots where the CSAT goes way up. We're encouraging our customers to adopt messaging as fast as they can and start the process of eliminating email. In addition, a good amount of voice can be deflected into the messaging channel.

## ***Do you hear anything back from the agents now that they're working side by side with bots?***

Agents doing very rote and routine types of work will be worried about their jobs. If a business has agents reading call scripts, a bot can take on that task. The questions agents may have are "how can I be retrained? What opportunities are available?" This can be somewhat of a scary time for part of the workforce. Most of what we see here in the United States are Tier 3 type of agents, these jobs are likely to remain intact because they're working on the long tail. The issue is more about Tier 1 or Tier 2 agents. What percentage of them can now do more of the pre-sales activities or expand the hours that a brand can offer service? I think there's a lot of opportunity in proactive support if you know specific customer behaviors, not just marketing to them, but anticipating service issues.