ICMI 2019 ScreenSteps

Greg DeVore, CEO, ScreenSteps describes their cloud-based solution as "a knowledge base and training platform, focused on decreasing the amount of time it takes for an agent to become proficient." From what they have heard from clients, it can take from 60 days to six months for an agent to be fully up to speed in a call center; ScreenSteps can decrease agent ramp up to 15 days. This is accomplished by providing agents with call flows and procedures they can bring up in the context of a call without having to put the caller on hold. With a procedure there to guide them, agents are then prepared to answer an issue –whether simple or complex. Typing in a specific question, agents receive back a suggestion of what they need to say and ask of the customer.

"As an example, someone might call in to change the owner on their account. Before change can be done, the agent needs to determine who is calling; is it the account owner or someone calling on behalf of the account owner?" he said. "The procedure will branch based on the answer and the agent will click that to see the next steps.

The solution also works with email, text and chat, and is particularly effective with the latter. On any channel, all the company needs to do is identify the most commonly asked questions and the appropriate article will be referenced. According to DeVore, the agents absolutely love the product, feeling far more confident that they can effectively assist customers when they come out of training. By lowering the stress associated with onboarding, agents can focus on better serving the customer.

Why do you consider it critical to make it easier for front-line employees to quickly find the answers to customer questions?

If your front-line employees can quickly find answers to customer inquiries, then your organization can cut your training time by as much as 75%. The diminution in training time is a result of agents not needing to memorize every process, policy, and procedure before being able to effectively respond to customer inquiries. As long as agents can quickly find (and read) an answer, they can support a customer.

Being able to quickly find answers also decreases the amount of time that agents put customers on hold and decreases the overall handle time. Not only does that improve your overall quality scores (since customers appreciate getting inquiries resolved quickly), but it also positively affects the number of agents you need to bring on in the first place. If you have 20 agents on the floor, and each agent is able to handle two more calls per day because answers are easier to find and read through, then that's 40 more calls a day that are being resolved without the need to bring more agents on.

And finally, when agents know how to quickly find answers, they can fill in for agents in other departments without needing to go through weeks and weeks of cross-training before being competent. This gives agents a change of scenery (which is good for them) and it allows other agents to fill in when an employee is out (which is good for their company).

How do your Keyword Search capabilities enable employees to navigate through better-organized content?

Primarily, ScreenSteps answers questions. Employees just need to enter the question that their customers are asking into the search bar. Our system indexes all article content and ranks the content based on a variety of factors so that the employee can easily find, and instantly jump to, the information they need.

In the search results, ScreenSteps makes it easy to determine which result is most relevant. ScreenSteps shows employees which category the article belongs to as well as provides a short preview of what is in the article. Managers can also restrict how much content employees can see so that only the content that's applicable to the customer segment being supported is visible. Also, additional filters can also be applied to narrow down the search results.

Because the ScreenSteps search is so effective, agents can find the applicable answers without missing a beat. There is no need to put the customer on hold while finding the right article.

In what ways does your solution allow businesses to provide training when employees are ready for it?

The ScreenSteps approach to training is different than most. ScreenSteps assumes that employees are going to forget most of what they learn during classroom training. So, we create resources to prepare for when employees forget.

That's why the ScreenSteps knowledge base is optimized for finding information at the moment it's needed. And it's why ScreenSteps articles are designed the way they are. Employees learn new information when they understand the context of how it's being used – so, when a customer calls in and the employee can walk through the answer while on the call, that information is more likely to stick.

As employees receive customer inquiries and reference ScreenSteps articles, employees gradually memorize the details at their own pace. Some agents will memorize procedures and processes slower than others, and that's OK because all agents are all still able to be productive agents as they learn and memorize what to do.

ScreenSteps also comes with a feature called "Courses" that allows managers to create self-paced modules that employees can go through when they are ready for it. These courses can focus on teaching employees about the product/service they support, or they can teach employees how to use the internal systems.

Can you elaborate on how you been able to help contact center operations have their agents achieve proficiency more rapidly and effectively?

We help contact center employees to achieve proficiency by making it possible for them to succeed with less training time and less memorization. Our most successful customers change their training approach to scenario-based training. Instead of having agents memorize a bunch of information for weeks or months, trainers put agents in real-world scenarios and teach them how to look up the answers and procedures they need in ScreenSteps.

Agents are taught how to succeed even when they don't have the answer to a question memorized. As soon as agents become proficient at using ScreenSteps, they can answer any inquiry from any customer while also hitting target metrics (e.g. handle time, hold time, quality).

Employees can handle both simple and complex customer questions without constantly distracting more experienced employees (putting customers on hold and asking others for help). Because the knowledge in ScreenSteps is always accessible, and very easy to read while on a call, new employees feel confident from day one. And training doesn't feel so daunting because there is no expectation to memorize a lot of information right away. Over time, employees will memorize the procedures. But all agents can reach proficiency more quickly and with less stress because they can reference ScreenSteps to answer any customer call.