

2020 CCW Nashville - Trendzact





Trendzact

Trendzact operates on the principle that the reputation of a brand is largely determined by the quality of its customer engagement. TrendzAct offers a cloud-based omnichannel CRM platform that incorporates routing optimization, workflow automation and business analytics, enabling contact centers to build more enduring customer relationships and meet rising customer expectations. Their method contributes to rapid results improving CSAT, NPS and customer retention rates. Matt Gabrielson, President and Product Visionary at TrendzAct, gave us an in-depth look at the benefits of the contact-center centric platform.

You characterize your product as a CRM system: why does the market need another one now?

CRMs have been around for a long time and most people don't see them as being all that interesting. But because we are highly selective and don't try doing everything for all companies, such as ERP and point-of-sale functions, we are able to focus on the unique needs of contact centers. I was an agent when I was in college, I've owned a BPO contact center, and both of my sons have done QA while they were growing up. So contact centers are in my blood and so is emerging technology. We decided to build a CRM that concentrates on the agent experience. The agent is the front line of any company and if you have a CRM that gives them the tools, then customers will soon know that they are in for a good experience and where they get reliable information. Our focus is strictly on mid-size to enterprise contact centers with complex integrations. We designed the platform specifically to be on Amazon Web Service (AWS) and we natively utilize the Amazon machine learning tools to create and deploy AI right into the CRM without add on products from an app store or relying on a 3rd party provider integrators to make it work.

Most CRM systems already incorporate purchase data, ticket history and other information needed by contact center agents. How does yours go beyond that?

We look for complex integrations. Some contact centers need to have access to external legacy systems, such as order history that must be retrieved from another system or data lake. Our platform brings in the external data or accesses the external integration, so the agent doesn't need to do any swivel-chairing or double entry copy and pasting. The agent UI also provides automatic recommendations for the interaction. Let's say that a customer initiates a web chat. The agent starts a ticket and the web chat is analyzed real-time so when our system sees certain keywords in the conversation, it steps in to recommend what should be asked next. It provides an optimal path so the rep can guide the customer to issue resolution. That's a true differentiator: it doesn't assume that the agent is autonomous in a silo and hope that they learned everything they should have in training. This hybrid approach guides the agent along the resolution path or to take advantage of an upsell opportunity. This in turn reduces agent training time. Instead of having to learn all the nuances of a business, the system, based upon the inputs of the customer in a call or webchat or SMS exchange, the system prompts the agent ask certain questions and it will provide ongoing prompts based on the customer's responses. For instance, in cases where the customer wants to update a reservation, the agent can go down to the reservation section where all the information is pre-filled and relevant options are automatically displayed. The capability of our native AI to effectively guide the agent is the true differentiator.

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The scripting is highly visible and uses the Amazon Personalize engine based on the same technology used at Amazon.. Over time, it uses machine learning to automatically update guidance information to indicate the best source to make the responses even more precise. It is of course not directed at one specific agent but distributed throughout the business to all front-line personnel. Agent skill is also accounted for: the information is customized to be routed to specific queues for different skills or specific products.

Is it possible to populate to the agent view as well as provide an integration to other self-service channels people are using and the company website?

Our Dynamic Lookup, which is the module we use for the machine learning, also ties into an existing company knowledge bases. One of our clients has a very complex internal financial knowledgebase. So, as agents type in specific parameters such as credit card type or error codes, not only does it populate the script and identify the root cause analysis, but we also pings back and present information from the company's community forum and internal knowledgebase. This makes for a truly holistic approach where it's not just one piece of data but multiple sources providing options and conversational texture for the agent. And over time, when the agent acknowledges that a knowledgebase article is helpful, the machine learns that and will rank that at a higher rate.

How does someone start the process?

Our CRM is a strong replacement for existing CRMs or even homegrown systems. A company can start by taking what it already has and replacing dated components and enhancing others. We have our own data scientists to serve our clients, so they don't have to hire a team of learn the AI processes. Our data analysts will go through what the company is doing and identify the best use cases. We can help the client decide what they want to get out of AI: is it looking for anomaly detection for cases that are outside the norm which could entail 30 different datapoints? Or is it examining metrics like average handle time (AHT)? Or to reduce after call work (ACW) by eliminating the time spent by agents having to type in the root cause? Or let's transcribe the audio or the webchat and automatically post it. Once we identify a company's most important priority, we can help it set attainable goals. Then, we build that model and provide a Proof of Concept which we can optimize over time. Trendzact CRM with AI is not just a black box or a slogan, but a concrete plan which produces meaningful, actionable data. Then, we repeat the process to identify another business case. Our business analysts know the contact center landscape and are fluent in all the metrics and acronyms which shortens the learning curve. TrendzAct helps them determine what is most important to affect significant improvements.

Once the business analysts have identified the use cases, the data scientists will do what I call the geeky work of figuring out how to solve the business opportunity from a 500-word document and write the algorithms to make it work. The teamwork between the analysts and scientists can be compared to the relationship between a sous chef and a master chef. The scientists come up with new ways to approach a problem and the analyst refines it for the client. It's always about actionable data. We never start a project just for the sake of doing it. We stress giving measurable value to our clients. We also strive for continuous improvement. The theories behind algorithms for artificial intelligence are changing all the time and there are always new tools being made available. We know we must prove our value every day and we tell our clients if we're not finding new ways to earn your business, then they should fire us.

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We know we need to provide more than just linear reports. It falls on us to give meaningful, actionable data to contact center leaders who want to make strategic decisions. They already know their metrics quite well. Our AI can go above and beyond and measure 30 or 40 additional datapoints that might not come up: such as all of calls from Milwaukee to a specific queue and skillset are out of range compared to all of Wisconsin. And that is the kind of information that can make a difference which would never come up in a flat report but can only be surfaced with AI. We also provide real-time alerts that go right through to the supervisor. We also offer ad hoc reporting and enable companies to build their own dashboard as well as numerous self-service tools.

How easy is your platform to use? What skill level does someone need to build their own reports?

We want to make it as simple as possible. When we built this product, we didn't want our customers to need a technician or an in-house developer. Many fields like statuses, drop-down boxes and layout ...even the ad hoc reporting... are drag and drop. Someone can do their own reports then easily share them. We do offer professional services for those who want to build highly complex reports but most of what we offer is intuitive and self-service.

When we go into for a consultation, we ask three questions about their CRM and reporting: What do you like and don't want to change? What do you hate and must change? And what is your CRM and reporting wishlist? From there, we can build a good requirement assessment: here's how we can help you continue to do what you do well, here's what we can fix and often, even the wish lists are attainable. Of course, sometimes we do tell companies that some things just can't be done. Part of being an honest vendor is knowing when you have to say "no". But with the technology we make available today, we say "yes we can" much more than in the past.

