

# PREDICTIVE BEHAVIORAL ROUTING

How does it work?  
What does it do?

November 19, 2019

presented in partnership with **CRM**  
**Xchange**

**NICE** · nexidia

hello  
!

**Michele Carlson**

Sr. Product Marketing Manager

**I'm a NICE Original**



**Kristie O'Donnell**

Director of Solutions Architecture

**I'm a NICE Advisor**



# Agenda

- The Missing Connection in Customer Service
- Predictive Behavioral Routing Product Overview
- Profiting From Personalization
- Q&A

# AUDIENCE POLL

Tell us about your ideal customer service experience.

# THE CONNECTIONS YOU ARE MISSING



**PX**

84% of consumers say personalized experiences are key to winning their business

**\$800B**

Personalization will shift \$800 billion of revenue to the 15% of companies that get it right

**95%**

95% of companies today are not personalizing interactions with intelligent routing

# AUDIENCE POLL

How does organization personalize the customer experience (address people by name, keep notes on previous interactions, etc)

If your organization hasn't embraced personalization yet, what's stopping you?

PREDICTIVE BEHAVIORAL ROUTING  
MAKING CONNECTIONS  
SMARTER

**Intelligently connect** customers with the best employee based on communication style and experience preferences to improve business outcomes



Handle Time



First Contact Resolution



Customer Satisfaction



Revenue Retention



Sales Effectiveness



# NASA ORIGINS PAIRING ON PERSONALITY



The Process Communications Model is extremely helpful for predicting human behavior.”

Dr. Terry McGuire  
Lead Psychiatrist for Manned Space Flight  
NASA

## SIX PERSONALITY STYLES

ORGANIZER



CONNECTOR



ADVISOR



ORIGINAL



DOER



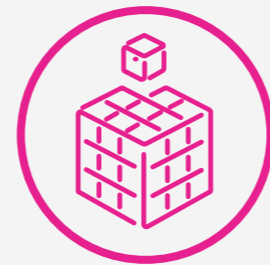
DREAMER



# TRANSFORMING THE CONTACT CENTER WITH PCM BY ANALYZING BILLIONS OF INTERACTIONS



## KEY ASSETS



PROPRIETARY  
BEHAVIORAL  
MODELS



MILLIONS OF  
BEHAVIORAL  
ALGORITHMS



INDUSTRY'S  
LARGEST  
BEHAVIORAL  
DATABASE



SIGNIFICANT DATA  
ASSETS THAT  
CONTINUOUSLY  
TRAIN AI



PROVEN  
ENTERPRISE  
INTEGRATIONS

**DATA TALKS**  
ARE YOU LISTENING?

HOW PBR WORKS

# INTELLIGENT ROUTING



01

## LEVERAGE EXISTING TECH

A customer calls your contact center and is routed to the pool of agents skilled to handle the call

02

03

04

HOW PBR WORKS

# INTELLIGENT ROUTING



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## LEVERAGE EXISTING TECH

A customer calls your contact center and is routed to the pool of agents skilled to handle the call

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## PERSONALIZE IN THE CLOUD

PBR instantly searches its proprietary behavioral database to identify the customer's communication style and experience preferences

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HOW PBR WORKS

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## CONNECT WITH AI

Leveraging specialized machine learning techniques PBR analyzes customer information, interaction history and employee performance records to recommend the best connection

04

## HOW PBR WORKS

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## IMPROVE BUSINESS OUTCOMES

The call is routed to the agent having the best predicted performance for the specific customer based on the configured optimization metric while still honoring business rules

# AUDIENCE POLL

Using the numbers below, tell us which metrics are most important to your organization.

REDUCE  
EFFORT

1

INCREASE  
RESOLUTION

2

IMPROVE  
CSAT

3

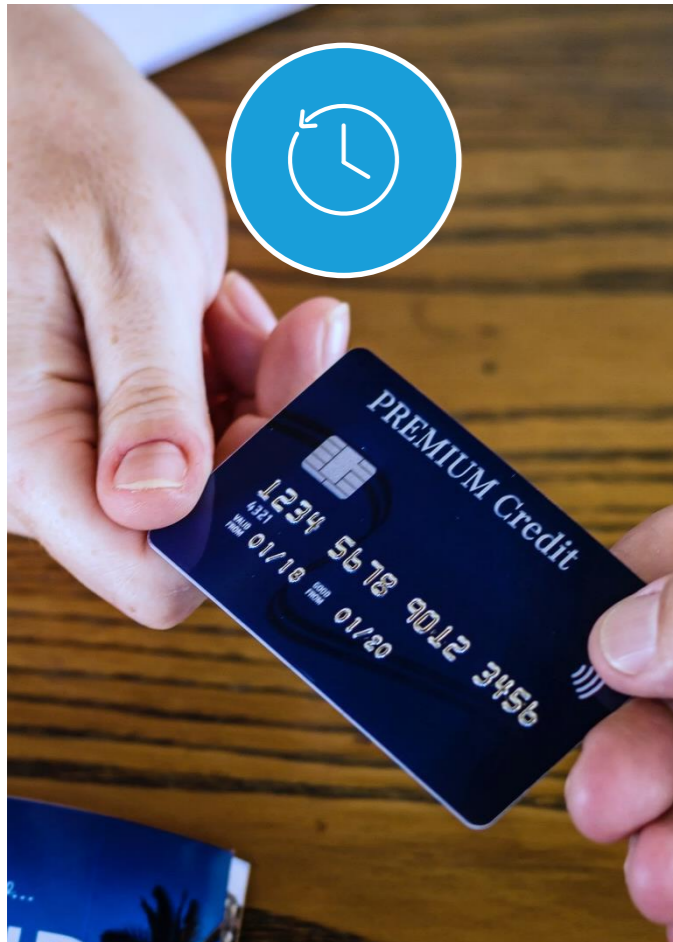
RETAIN  
REVENUE

4

DRIVE  
SALES

5

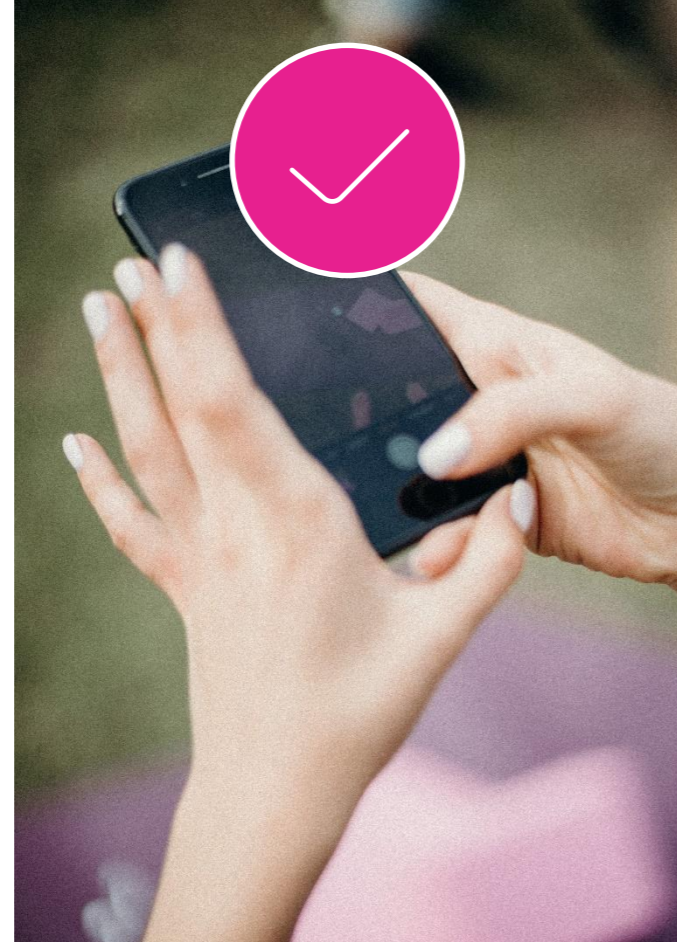
# PROFITING FROM PERSONALIZATION



## REDUCE EFFORT

AHT optimization  
7% benefit  
3,000 seats

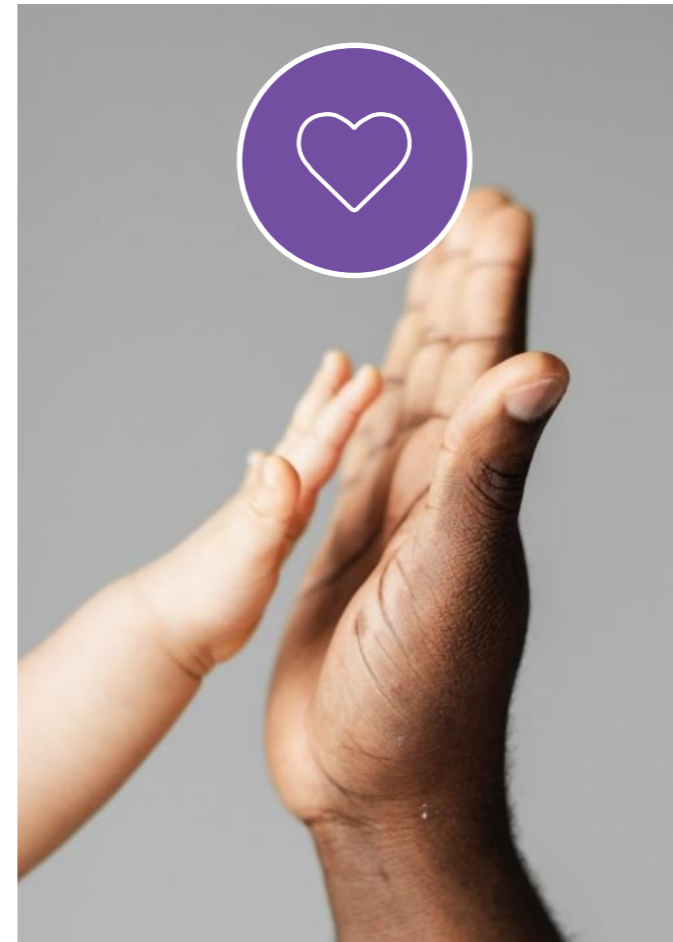
Financial Services



## INCREASE RESOLUTION

FCR optimization  
7% benefit  
250 seats

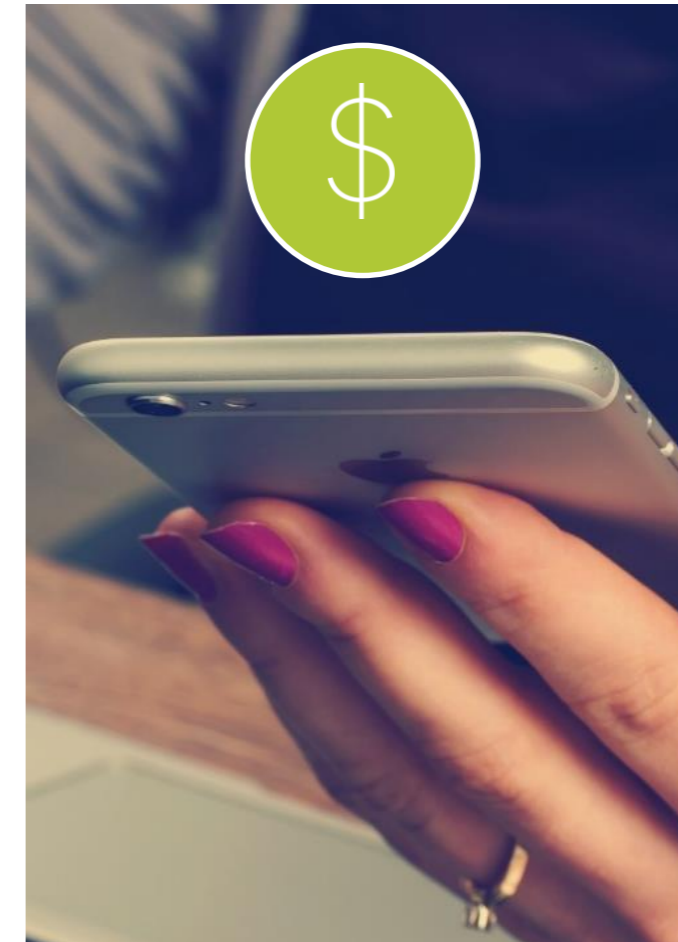
Technology



## IMPROVE CSAT

CSAT optimization  
3% benefit  
10,000 seats

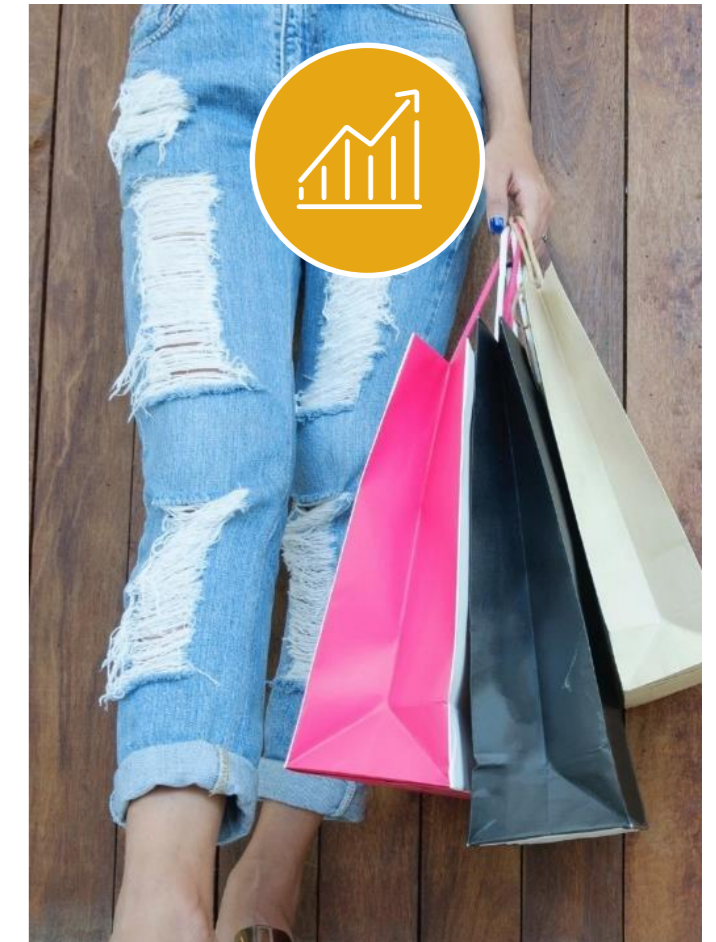
Healthcare



## RETAIN REVENUE

\$REV optimization  
2% benefit  
2,000 seats

Media



## DRIVE SALES

LTV optimization  
3% benefit  
500 seats

Retail

## TESTIMONIALS

# DELIVERING VALUE WITH PERSONALIZED CONNECTIONS



“Technologies like Predictive Behavioral Routing, and partnerships with leaders in the industry, help us execute on our promise to make life shine brighter for our customers.”

**James Cave**  
Sr. Director, Omnichannel  
Customer Experience



“We have implemented sophisticated analytics to drive predictive call routing. These initiatives improve customer satisfaction and reduce call transfers by approximately 12%.”

**Bruce Broussard**  
President and CEO



“Predictive Behavioral Routing aligns our customers and agents in a way that creates an experience that differentiates us and makes the customer appreciate the relationship with us.”

**Brian Gillespie**  
VP, Forecasting &  
Financial Excellence

# VALUE REALIZATION

# CONTINUOUS MEASUREMENT OF ONGOING VALUE

Built-in A/B testing provides a clear statistical view to the value produced for your business



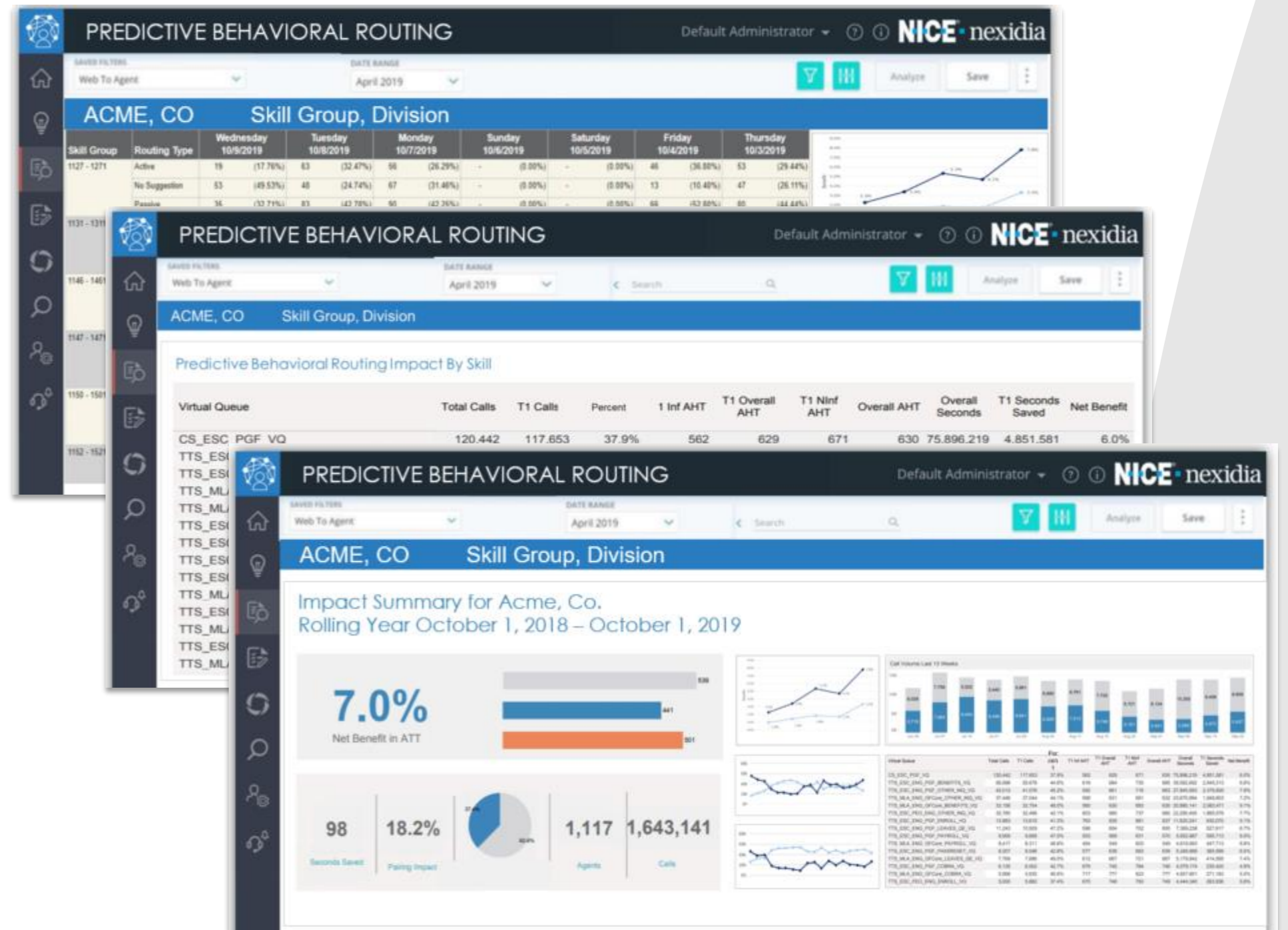
ROI REPORT



BEHAVIORAL BENEFIT

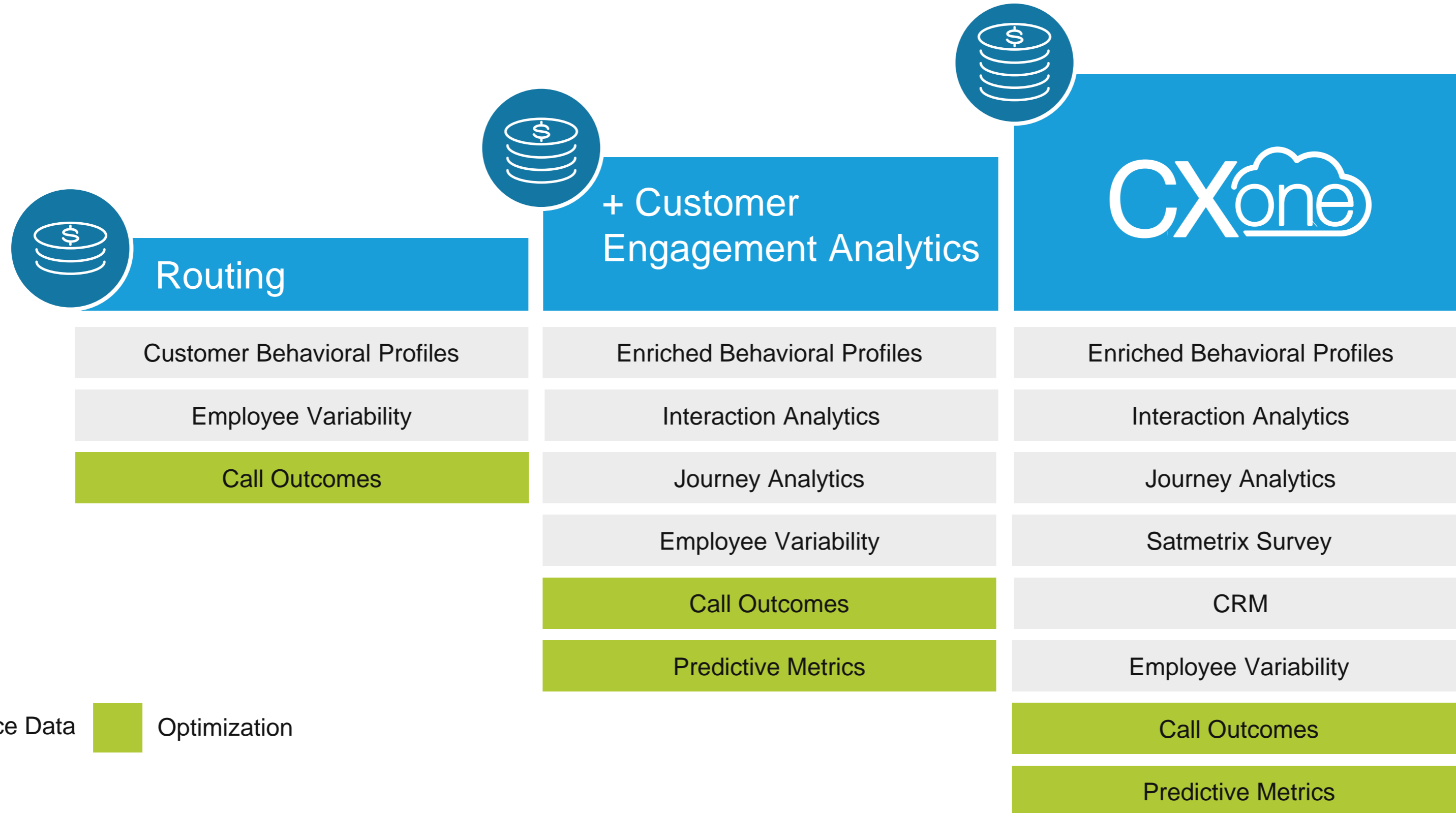


TECHNICAL HEALTH



# THE POWER OF THE PLATFORM

# GROWING ROI WITH SMARTER CONNECTIONS



Source Data
  Optimization

## KEY PRODUCT FEATURES

# SOLUTIONS TO GUARANTEE YOUR SUCCESS

### SAAS DELIVERY MODEL

#### TECHNOLOGY



ADJUNCT  
INTEGRATION



BEHAVIORAL  
DATABASE



BEHAVIORAL  
ANALYTICS

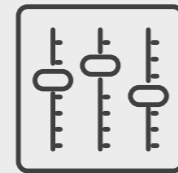


PREDICTION  
ENGINE

#### FEATURES



FLEXIBLE KPI  
CONFIGURATION



WORKLOAD  
GOVERNOR



A/B BENEFIT  
MEASUREMENT



NO OPS CHANGES  
NO AGENT  
SURVEYS

#### PLATFORM



SCALABLE CLOUD  
ARCHITECTURE



DATA EXCHANGE  
FRAMEWORK



ENTERPRISE  
RELIABILITY



EXTENSIBLE NICE  
PRODUCT ADD-ONS

#### TRUST



CCPA & PRIVACY  
COMPLIANT



NO PROTECTED  
CLASS DATA USAGE



SOC 2 TYPE 2  
HITRUST  
PCI-DSS



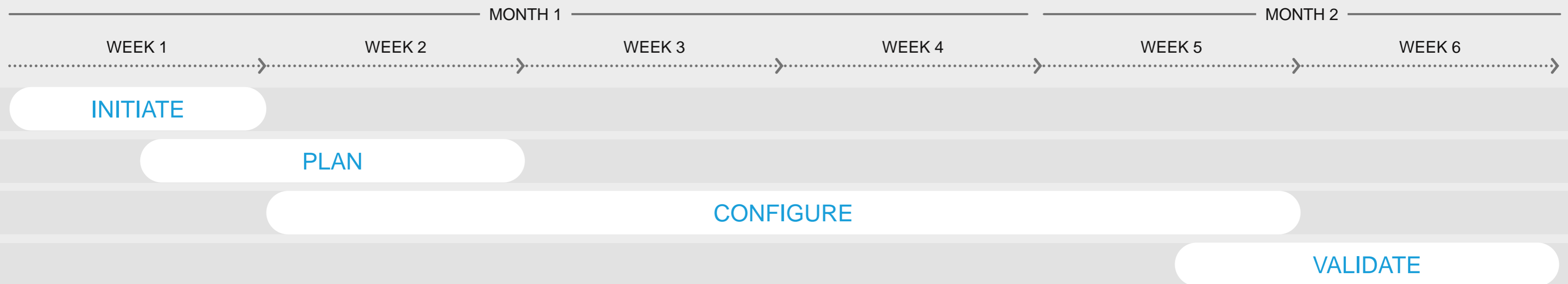
REGULATORY  
COMPLIANT

# AUDIENCE POLL

As a timeframe, how long does it take your contact center to get a return on investment from a new solution?

# TIMELINE

## SIMPLE TO IMPLEMENT AND REALIZE BENEFITS



**\$5.4M** 3-year benefit

Immediate improvement to your **key metrics**

Performance **guarantee** pricing model

### BENEFIT CALCULATION EXAMPLE

**1000** # of FTEs

**6,000,000** annual calls handled

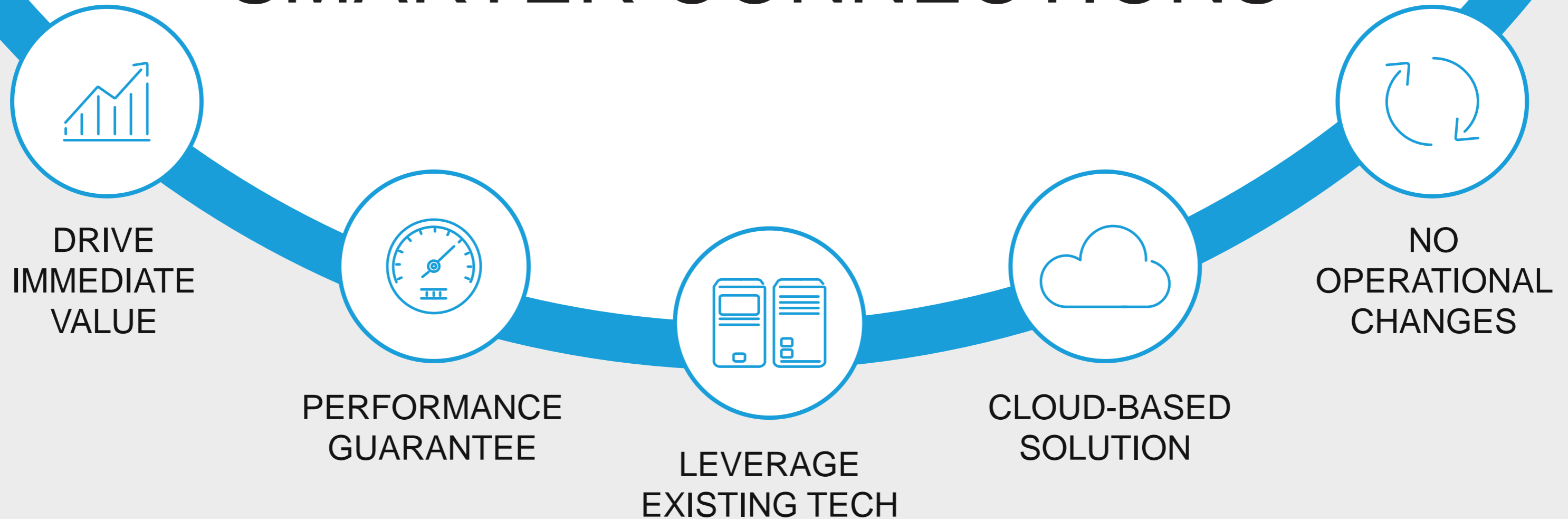
**600s** average handle time

**\$0.60** cost per minute of handle time

**5%** average handle time reduction

**\$1,800,000** annual savings

# USE THE POWER OF DATA TO MAKE SMARTER CONNECTIONS



**Q&A**

**PLEASE SHARE YOUR  
QUESTIONS**

# Thank You

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Read more at [www.nice.com/pbr](http://www.nice.com/pbr)

# APPENDIX

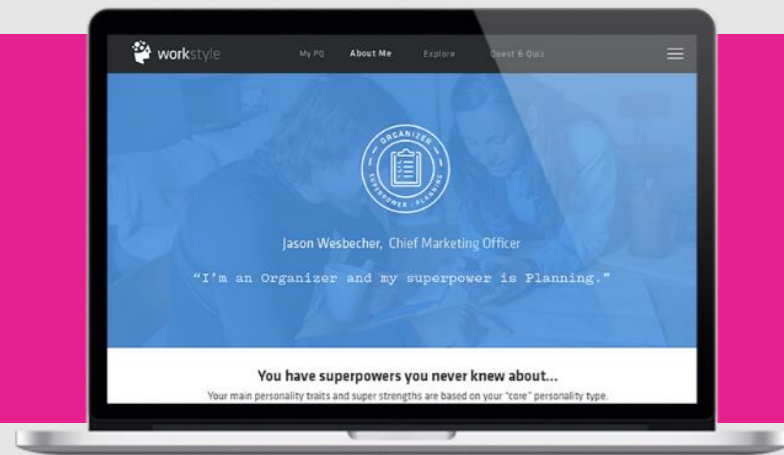
COMMUNICATION IS PREDICTIVE

# EXPLORE THE SCIENCE OF PERSONALITY



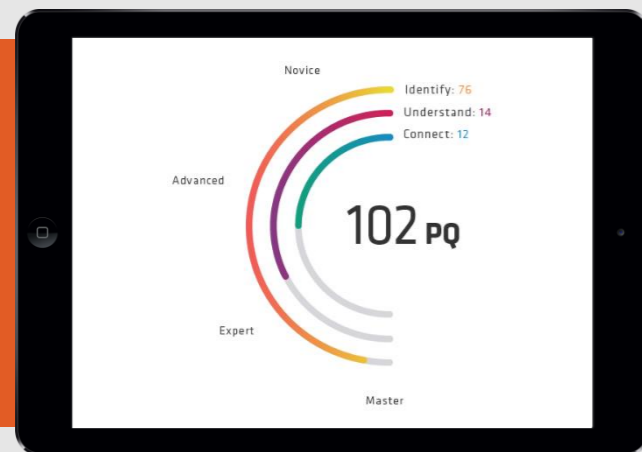
## TAKE A QUICK PERSONALITY ASSESSMENT

Our brief, proprietary assessment identifies your personality type, communication preferences, and psychological needs.



## GET AN INSTANT PERSONALITY REPORT

A personalized report with an outline of your personality type, your strengths, and communication preferences.



## TRAIN YOUR PERSONALITY QUOTIENT

With videos, how-to's, tips, and games learn to identify, understand, and connect with different personality styles.