

# Five Steps for Improving Data-Intelligence Across Contact Center Activities



Use this step-by-step strategy design guide to maximize your Salesforce Contact Center solution's investments with Government Cloud Wave.

## CONTACT CENTERS SERVE AS THE PRIMARY ENGAGEMENT TOOL BETWEEN GOVERNMENT AGENCIES AND THEIR VARIETY OF CUSTOMERS

In today's evolving digital world, we have become accustomed to engaging via digital platforms. What was once a traditional call center, receiving and routing phone calls about various inquiries, has now transformed into a multifaceted hub and communication center that manages emails, tweets, web forms, inquiries submitted via mobile apps, incoming calls, and more – with a capacity capable of supporting cities, state-level departments, and federal agencies.

In order to manage service delivery with today's variety and volume of inquiries at a pace relevant to this evolved environment, agents, managers, and executives need a granular understanding of behavioral patterns and catalysts to help their communities thrive.

Deploying Government Cloud Wave – on top of Salesforce Contact Center – unlocks the tools capable of delivering comprehensive, in-depth insight.



## SALESFORCE CONTACT CENTER SOLUTION

Our secure, multichannel enterprise app specializes in agent productivity tools, collaboration functionality, and outreach efforts for improving customer experiences. By bringing communication efforts together on a single platform, agents can engage their team to streamline responses, lower operational costs, and add a personalized touch to the governing process.

Learn more about [this solution in Federal](#)

Learn more about [this solution in State and Local](#)



## GOVERNMENT CLOUD WAVE

Our data-intelligence expansion pack for solutions was built on the FedRAMP-approved Government Cloud platform.

Give Salesforce users the modern, mobile, and analytical functionality they need with our data-intelligence extension pack for Government Cloud solutions. It layers on top of our Contact Center solution, giving government employees the kind of granular insight they need to identify patterns, resolve issues, and better understand the needs that drive their mission.

With Government Cloud Wave, any government employee can bring together multiple data sources and easily analyze patterns across inquiries and resource requirements. This develops the kind of granular insight that helps teams better understand and execute against the needs of the community they serve. It's data intelligence for the rest of us, on our FedRAMP-approved cloud platform.

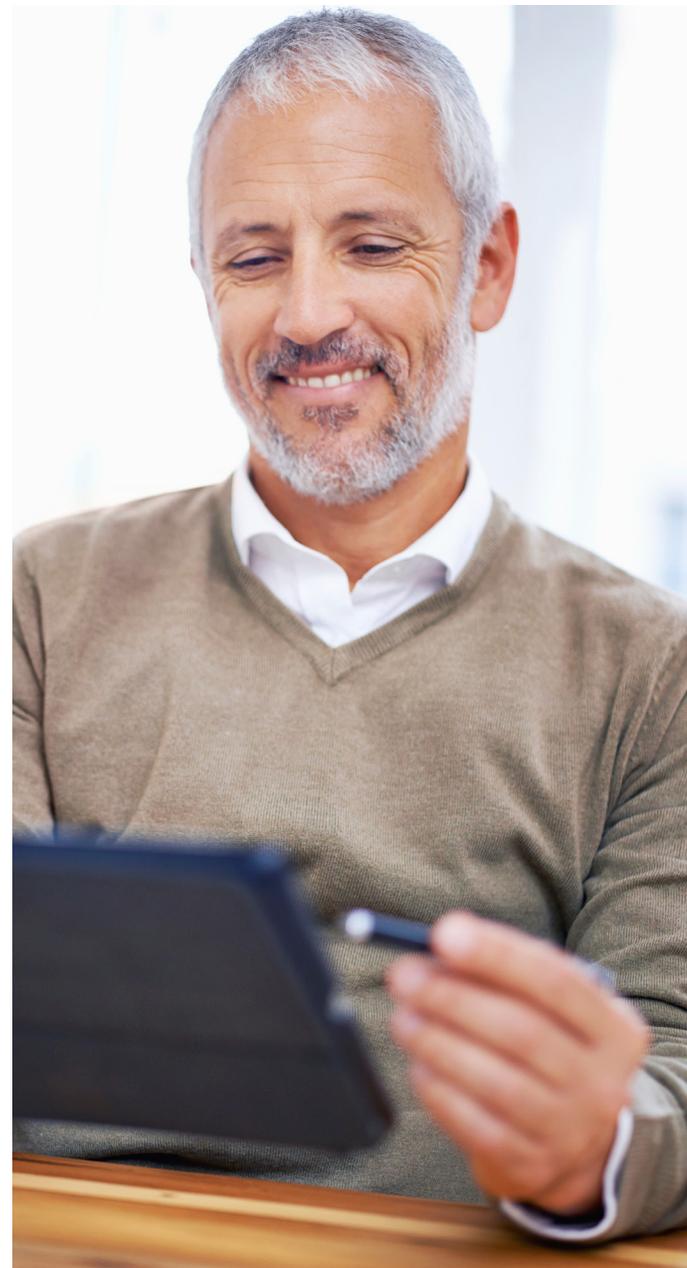
[Learn more](#)

## IT'S TIME TO BEGIN IMPLEMENTING A PLAN

Strengthen your data-driven capabilities across contact centers with these five steps.

### ✓ STEP 1: UNDERSTAND YOUR DEMOGRAPHICS

Each community has its own unique challenges and opportunities. Understanding the demographics, and how they influence your ability to communicate and connect, will help you to invest in targeted, impactful, and innovative projects.





## LOCAL OR STATE EXAMPLES

### Number of citizens

As a community becomes more populated, the importance of service scalability is further emphasized. Likewise, communities with fewer citizens tend to have higher expectations that services be customized and deliver a personal experience. Understanding the balance between scale and personalization within the community you serve can help you develop a system that can manage volume and variety.

### Population density

Populations living in close quarters can require more concentrated services. They often expect proactive services, as needs tend to be more apparent to an observer. In contrast, communities that are more spread out can require more robust engagement channels, allowing them to be heard regardless of distance. Understanding the composition of your community can help you develop a system that aligns expectations and service capability.

### Languages

The more our communities grow, the more they are enriched with culture, experience, and insight. Developing a system that can support multilingual communities helps administrations serve an increasingly diverse set of departments, and attracts the kind of new ideas that create opportunities to flourish.

## STATE OR FEDERAL EXAMPLES

### Mix of departments

As an agency grows to support a wider variety of departments, contact centers need to incorporate a broader array of data types, formats, and overall needs. If the agency supports a more homogenous mixture of agencies, it's usually expected to offer more in-depth answers and support from within its resources. In both scenarios, the agency will likely have to match inquiries with historical data housed in legacy systems.

### Inquiry frequency

Some agencies might be working with departments that submit inquiries on a fairly regular basis, and as a result expect reliable timelines that come from clear process visibility. Other departments may submit inquiries on a random basis, such as those dealing with emergency services. They are likely to expect more constant dialogue and immediate support channeled through a single point of contact.

### Supporting priorities

Agencies have to work in a bidirectional manner, meeting departmental priorities while still adhering to precedents set by the chain of command. They need a flexible system that can incorporate department guidelines while also adjusting within the confines set by the larger agency – matching strategy and operations.

## STEP 2: SET CLEAR GOALS AND OBJECTIVES

Once your team has rationalized community demographics through the lens of a modern contact center project, it's easier to set clear, targeted goals that take into account realities surrounding your mission.

GOAL	Better manage high volume of inquiry data.	Better integrate all varieties of inquiry data.	Transform contact center services to be more targeted and time-sensitive.
SYMPTOMS	<ul style="list-style-type: none"> <li>➤ There is a frequent backlog of open inquiries or unanswered questions.</li> <li>➤ Answers to inquiries are often delayed.</li> <li>➤ Teams disagree on pertinent information versus noise.</li> <li>➤ More of the IT budget is allocated to data cleanup or data quality efforts.</li> <li>➤ Decisions or recommendations on next steps are harder to defend with data.</li> </ul>	<ul style="list-style-type: none"> <li>➤ In order to answer an inquiry, agents have to leave the contact center app to access an outside team or system.</li> <li>➤ Reporting asks have to be submitted to a data-strategy team – not the caseworker.</li> <li>➤ Analysis is done manually in Excel.</li> <li>➤ Reports are delivered in PowerPoint instead of live charts via an app.</li> <li>➤ It's difficult to quickly assess environmental influencers or determine correlations.</li> </ul>	<ul style="list-style-type: none"> <li>➤ More of the IT budget is allocated to system maintenance than to system enhancements.</li> <li>➤ Big-government initiatives are difficult to map to individual needs highlighted by inquiries.</li> <li>➤ Best practices are hard to prove or repeat.</li> <li>➤ It's difficult for teams to find answers that meet both departmental guidelines and agency stipulations.</li> </ul>
OBJECTIVE	Make information, answers, and subject matter experts more accessible.	Better understand context surrounding an inquiry and how it relates to the larger community.	Deliver a modern, innovative mission.

## STEP 3: OUTLINE THE CRITERIA

Once department or agency leadership understands the background, goals, and objectives, it can outline project criteria. Project criteria should be grouped into two categories, – both with a customer-first mindset.

### Technological criteria

Examining the technological state of readiness across your demographics will help you:

- Understand which goals should be met with mobile-ready technology.
- Know where and when to incorporate social commentary.
- Know how to route inquiries across teams so that answers are delivered in the most comprehensive, timely manner.

This ensures that the right functionality is in place for the customers you serve, and that the solution is built in a way that is user friendly, encouraging external participation and internal adoption.

As customer needs across the community change, your citizens, employees, and representatives will need a solution that can be nimble enough to adjust to current dynamics and sustainable enough to provide a lasting, consistent experience. Your customers deserve a platform that is capable of supporting a technologically advanced government organization, and of delivering modern mission services.

Government Cloud Wave can help agents, managers, and executives better understand this data, as well as agility needs, by providing:

- **Bidirectional views** that let users see data from a summary perspective, or drill down into details with a few simple clicks, enabling teams to navigate reports in a way that reveals true insight.
- **An intuitive, visual interface** that makes it easy for people to quantify data, compare performance, map influencers, spot correlations, and understand overall patterns, informing what involvement is necessary from specific team members.
- **Collaboration capabilities** that enable teams to save and share reports from a common platform, removing typical communication barriers. Integrated notifications can be used to alert people, teams, or communities of more urgent information. This helps to directly involve partnering organizations critical to the need.
- **Take action** by executing next steps directly from dashboards, changing fields in the CRM, and creating tasks that resolve inquiries fast.

**RESULTS:** Gain more information to understand impact and clearly articulate it to others, fostering a data-driven approach to finding every answer. The significance and the context that tends to get buried by pivot tables in a spreadsheet becomes clear.

**IMPACT:** Streamline inquiry resolution by solving the root problem instead of treating symptom after symptom. Transition more resources from emergency services, which tend to come with a poor user experience and hefty price tag, to preventative services.

### Team resources and support criteria

A successful project works when it's driven by a team that believes in it. Help create this mindset and experience by identifying internal project owners who will be accountable for the rollout of your contact center solution. Next, pair them with a group of champions who can drive awareness and education across your customer base or community, developing an execution plan that integrates real-time feedback and checkpoints. Finally, select stakeholders who can act as consultants as they prioritize activity, determine pilot requirements, and set benchmarks.

Government Cloud Wave can be used to inspire and motivate project owners, teams, or champions.

- Self-service analytics tools let users load data as they need and then update status, assign tasks, or initiate cases directly within the dashboard. Agents can then quantify, report, and move on in a timely manner with the level of detail dictated by the circumstances.
- The same intuitive visual interface make it easy for people to understand the data and draw conclusions, encouraging data exploration and engagement of more employees in metrics.

**RESULTS:** Agents have an easier time applying information to day-to-day activities, giving them visibility to their impact on the mission and allowing them to develop the kind of data-driven mindset that comes from giving each employee analytical ownership and insight.

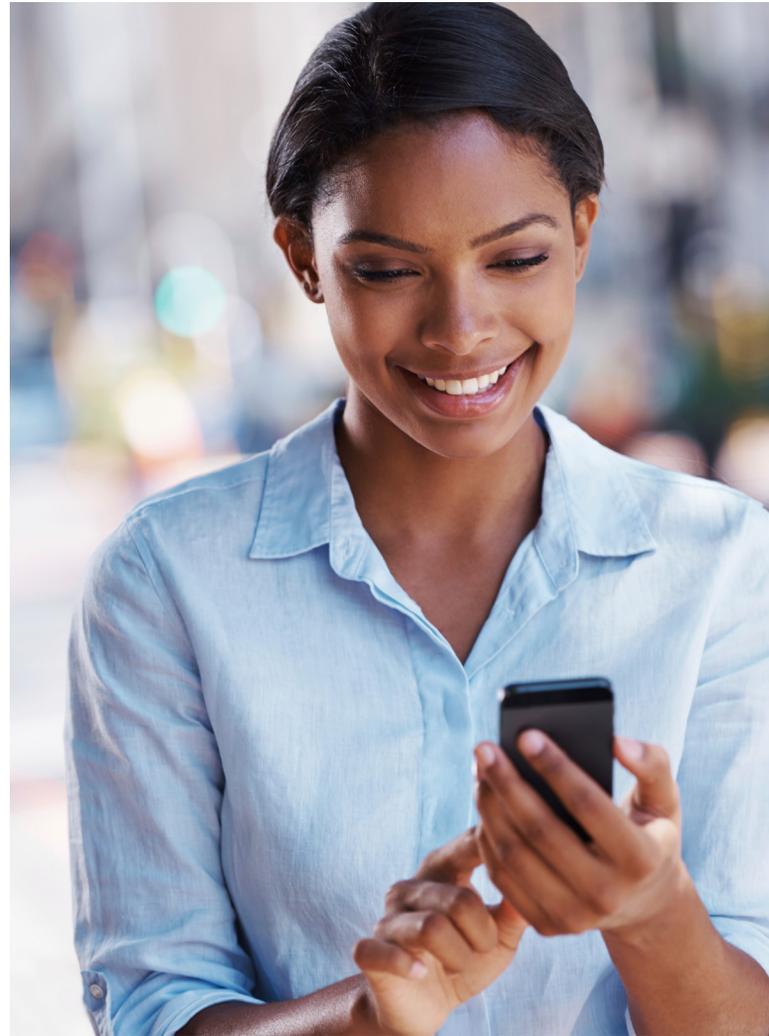
**IMPACT:** Turn each employee into a knowledge worker with the tools that empower action and inspire a sense of personal commitment, moving the mission forward faster.

## WHAT IS “CUSTOMER FIRST”?

You might have heard of the buzz phrase “mobile first” – the idea that customers, employees, or users of any kind can access information first via a smartphone or tablet, compared to a desktop or laptop computer. It’s also used to determine strategy and align an execution accordingly. For example: Does a company need to update its mobile site before its full website? Does it build apps before creating forms? Does it hire more mobile developers?

As service and experience continue to be the next big differentiators, organizations that take a customer-first approach will ask questions like: “How will the customer access the service?” “How will the customer report an issue?” and, “Who will the customer need to interact with and when?” instead of, “How quickly can we reasonably resolve an inquiry?”

Using this thought process and starting with these customer-first questions, public sector leadership can work back from the answers to determine the mix, priority, and general strategy surrounding key services. It connects the community in a way that is more relevant, actionable, and visible to constituents in this new era of differentiation, and strengthens the trust between government and its customer by increasing transparency and improving the experience.



## SALESFORCE SERVICE WAVE APP

Service Wave is an app, available as a component of our Wave platform, that delivers prebuilt dashboards reporting on the fields most commonly used by agents or customer reps. Native integration with the Salesforce Contact Center service portal, powered by Service Cloud, serves up dashboards alongside the screen view, providing complete, instant, and relevant data around mission-critical KPIs.

Optimize channel performance, track Contract Center efficiency, and use historical analysis to facilitate a more informed interaction with the customer. Create tasks, update records, coach teams, and foster data-driven collaboration. Open and close cases right from the point of insight on any device for faster resolutions – all to ensure a better mission experience.

The Service Wave App provides analytical capabilities out of the box, delivering faster time to value for Wave platform deployments. Leverage it stand-alone or as a part of a full Wave platform deployment, unlocking custom app capabilities that provide the same user-friendly data exploration and reporting interface across third-party information. Deliver a 360-degree view of all contact center data points and engagements.

[WATCH DEMO](#)

## MODERN TECHNOLOGY + DATA-DRIVEN TEAMS = HIGHER-QUALITY SERVICE DELIVERY

Government Cloud Wave integrates data from a variety of mission-critical programs, including:

- ›Salesforce apps, both inside and outside the contact center
- ›Case management systems
- ›Telephony data (CMS)
- ›Department or agency success metrics, as well as current performance
- ›Historical data from previous projects, individual team insight, and statistical averages often housed in legacy-data warehouses, on-premises systems, identity management, and more
- ›Resource data, such as resources required, resources consumed on average, and outlying circumstances that previously prioritized specific inquiries or justified more investment
- ›High-volume data of any kind, eliminating caps that place artificial barriers on your understanding of how to best answer an inquiry

**RESULTS:** By bringing more data into the contact center, and analyzing it in a comprehensive manner, stakeholders build greater confidence that each aspect behind the community or mission is being taken into account when agents are drawing conclusions.

**IMPACT:** Easily accessible data drives more accurate, timely, targeted services, ultimately improving the experience delivered by the agent.

### STEP 4: BUILD THE EXECUTION STRATEGY

With technology and a general resource criterion that clearly supports establishing goals and objectives, your team is empowered to build an actionable execution plan that's accurate with respect to community behavior patterns. The plan is built based on metrics that quantify the user experience, incorporating checks and balances at the foundational layer of your citizen-first, customer-first contact center strategy. Identify the metrics that you want to measure in order to determine successful engagement, justify spending, and prioritize channels.

#### **Social monitoring**

Monitor the number of comments made or recognized in your contact center solution, the number of answers given, the number of answers supplied by the community versus the agents, the general sentiment, and response time. Measure these by using hashtags, following handles, and polling. Translate that data into reports on an integrated dashboard. These metrics will determine how much your customers attempt to communicate via social, and how well you engage in the conversation.

#### **Incoming email, phone calls, and forms**

Monitor the number of submissions, average response time, and level of complexity of the ask to the customer. Measure these by tracking activity quantity on an integrated contact center platform. Incorporate qualitative information within the ticket profile. These metrics will determine how popular traditional engagement channels remain, as well as how accessible your services are with respect to normal customer behavior. If the asks tend to be complex, with multiple layers of needs that have to be solved sequentially, you might see a drop-off in engagement, and have to re-examine how easy it is to submit an inquiry. If there isn't a way to easily raise a hand in real time, people could be summarizing the problem all at once. These symptoms can easily highlight the long-term fix.



## Mobile ready

Monitor how frequently agents answer an urgent need or an on-the-go need after the fact, the number of real-time channel options available, inquiries routed in real time, staffers without in-the-field responsibilities who submit status updates from a desktop or laptop, and the level of awareness of mobile tools. Measure these by tracking inquiries, response time, and comments, grouped by channel on an integrated contact center platform. These metrics will tell you how support compares to real-time needs – and how well you have communicated mobile readiness across your staffers and community.

## Apps

Monitor the number of times customers access an app, how many inquiries were made via the app, and how many answers came from the app. Measure this by monitoring activity on apps built on the same contact center platform that integrates feedback and inquiry data. These metrics will help you to understand how well the app in question has been communicated and if it's well-functioning.

## Outgoing communications

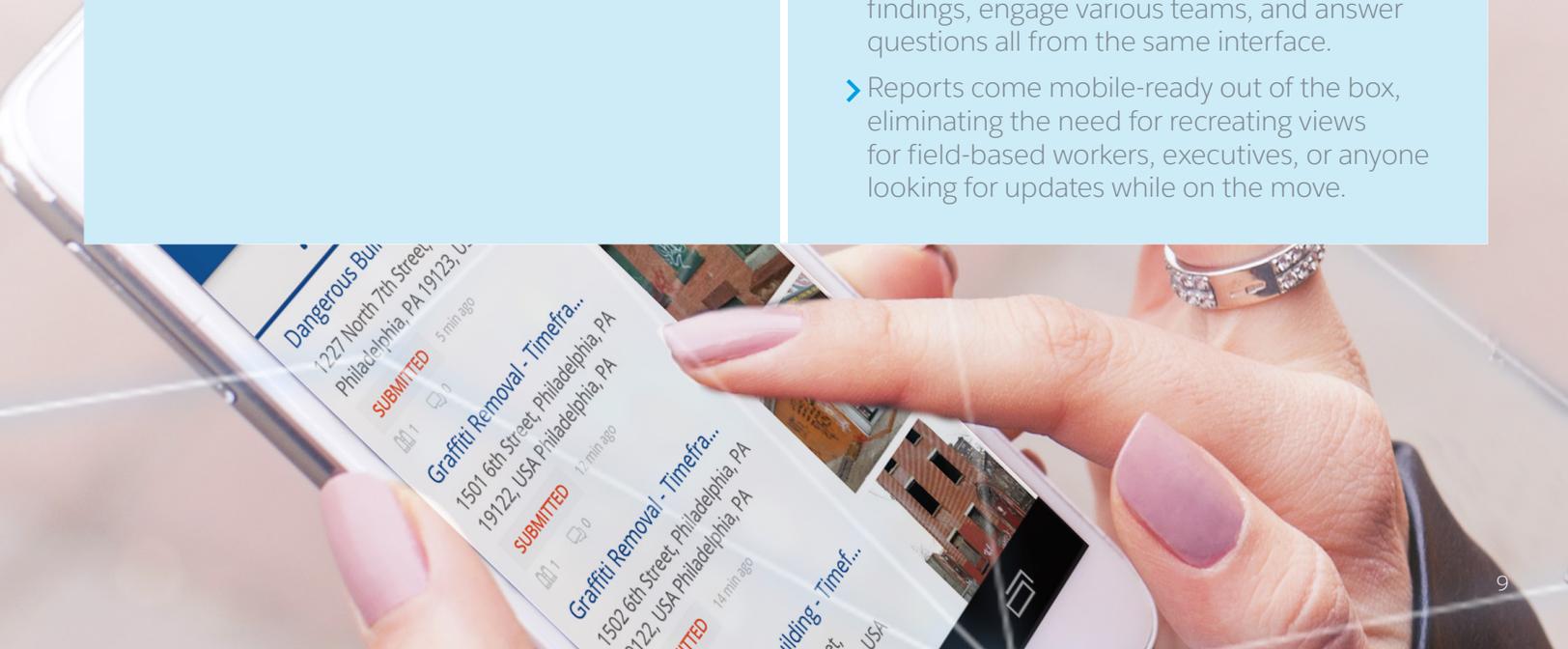
Monitor the number of outgoing communications, open rate, click-through rate, reaction, and response time. Measure this across channels on an integrated contact center platform. It will help you compare incoming and outgoing communications, ensuring that you're matching the degree of participation across your community. By having all of these channels integrated on a common platform, it's easy to establish metrics that capture the 360-degree view of the citizen or department inquiry, and how well your team is able to handle expectations. Use an integrated contact-center platform approach to quantify the level of community activeness, and encourage more participation to help you build a stronger connected city.



The unique capabilities of Salesforce Contact Center with Government Cloud Wave can help every level of the organization track progress, isolate best practices, and repeat successful service delivery with a robust set of modern tools that align metrics to goals and objectives:

**Capabilities that deliver on the metrics, like the ones discussed, in alignment to goals and objectives**

GOAL AND OBJECTIVE	CAPABILITIES
<p>Better manage high volume of inquiry data by making information, answers, and subject matter experts more accessible.</p>	<p><b>Analytics for everyone:</b></p> <ul style="list-style-type: none"> <li>➤ User-based, not schema-based: – Users can pull in the right dataset to answer the question, free of report template restrictions or capacity limits.</li> <li>➤ A user-friendly interface designed for business users, rather than business analysts, allows agents routing questions and answering inquiries to separate noise from insight – no pivot tables required.</li> </ul>
<p>Better integrate all varieties of inquiry data by leveraging more context surrounding an inquiry and learning how it relates to the larger community.</p>	<p><b>Holistic view:</b></p> <ul style="list-style-type: none"> <li>➤ Government Cloud Wave manages millions of rows of data from Salesforce apps (such as contact center inquiries and custom intake apps) via native integration and third-party apps (such as Excel or on-premises systems) via standard APIs</li> <li>➤ This helps agents to analyze data in the context of the question at hand, and managers to understand patterns as a whole.</li> </ul>
<p>Deliver a more modern, innovative mission by making contact center services more targeted and time-sensitive.</p>	<p><b>Efficient single platform:</b></p> <ul style="list-style-type: none"> <li>➤ Government Cloud Wave’s platform approach enables users to explore data, communicate findings, engage various teams, and answer questions all from the same interface.</li> <li>➤ Reports come mobile-ready out of the box, eliminating the need for recreating views for field-based workers, executives, or anyone looking for updates while on the move.</li> </ul>



## STEP 5: MONITOR, MEASURE, REFINE

Leadership cannot control what it can't measure. By incorporating a wide variety of data from information channels typically isolated from one another, it's easy to measure comparative performance, as well as changing trends over time. If phone calls and emails begin to show fewer numbers overall, but social media and app-based inquiries rise, it's easy for leadership to adjust funding accordingly.

With this insight, government can control its community alignment and encourage longer-lasting participation across a more engaged and satisfied customer base. This serves as a defector marketing strategy for the department or agency, giving it the support it needs to transition conversations from mission improvements to visionary impacts, redefining the purpose of the organization to become more revolutionary, relevant, and innovative moving forward.



<sup>1</sup>Salesforce, has released the results of its biannual customer relationship survey conducted by independent research firm Confrimit Inc. A total of 4,626 responses to the survey were received from English, French, German, Japanese, Spanish, Portuguese, and English UK speaking customers worldwide. The respondents were randomly selected and represented organizations of all sizes, across the globe, from 72 countries, and 15 industry sectors. Response sizes per question vary. When survey respondents were asked about percentage improvements in performance metrics, the survey found these average improvement achievements: 52% faster response to customers, prospects, employees, and/or partners; 51% faster collaboration; 49% faster resolution time; and 49% faster decision making. Results are for public use.

Confrimit helps businesses operationalize feedback to drive change throughout their organizations using the world's most secure, reliable and scalable solutions for Voice of the Customer, Employee Engagement and Market Research programs.

Questions? Our reps have answers.

1-844-807-8829

