



Solution Overview



## **Optimizing Customer Care Processes Using Operational Intelligence**

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## Executive Overview

In this time of increasing social media communications and decreasing customer switching costs, a negative customer experience can abruptly end a customer relationship and harm a company's reputation. Companies must consistently deliver excellent customer service to prevent customers from switching to alternative providers. Traditional barriers to exit are nearly extinct. Yet, loyal customers are still the most profitable customers: they spend more than others and they recommend the service to prospective customers. While most companies understand this principle, many have difficulty delivering a seamless customer experience due to the complexity of their existing customer care processes.

Complex processes, poorly integrated applications and large data silos make it easy for high value customers to "fall through the corporate cracks". Optimizing customer care processes involves managing business processes across multiple, complex systems that often span numerous business applications, from customer service (CRM) to service provisioning to billing.

The barriers to superior customer care processes and service can be grouped into three categories. First is the lack of visibility into customer related events, data and care processes. Second is insufficient insight into the causes of customer issues and failures. And third is the inability to take action to resolve issues on behalf of the customer, or better yet, before the customer notices. Managing the entire customer experience requires visibility, insight and the ability to take action on issues impacting the customer.

Operational Intelligence (OI) connects business analysis to operational processes, enabling real-time visibility, insight and action. With Operational intelligence, service companies can identify and eliminate gaps in customer care processes, increasing customer loyalty and reducing the costs associated with manual customer process intervention and remediation.

Companies can create a competitive advantage by proactively eliminating potential problems and identifying opportunities to improve critical customer care processes. To achieve a competitive advantage, companies must gain visibility into the processes that touch customers across all systems, applications, and business units. Once end-to-end visibility is established, the data can be analyzed for insights into significant customer events so that pro-active action can be taken in time to prevent problems, increase loyalty and retain customers. Designed from the ground up to be a tightly integrated Operational Intelligence platform, Vitria M<sub>3</sub>O quickly provides the visibility, insight and ability to take actions that optimize customer care processes, increasing loyalty, reducing churn and maximizing revenue.

*With Operational Intelligence, companies eliminate the information gaps and gain the necessary end-to-end visibility into service operations to improve monitoring of key success and failure points.*

## Establishing Visibility Into Customer Care Processes

It is too often that valued customers and their transactions fall through the corporate cracks. Customer care failures are the result of intelligence gaps that prevent executives, managers, and customer service representatives from having complete visibility into customer issues, service levels and service quality. How many times have you heard a customer service representative say “I’d like to help you but I can’t” or “I don’t have access to that system”? The difficulty achieving visibility into the customer experience and care processes most often stems from an inability to establish a single view of the customer data which resides in systems and “silos” that have multiple points of ownership across the organization. The result is the inability of front line customer care representatives to react to and remediate customer issues in a timely manner, if at all.

Where visibility into existing customer data can be achieved, the high volume of incoming, real-time events and data related to the customer adds to the complexity, making it difficult to identify the source of customer issues and provide a timely resolution. The result is a breakdown in the customer care process where an issue is not identified until a customer complains or a ticket is opened. Without complete visibility into the events and processes impacting the customer, resolutions are not implemented as a standard, automated processes. Instead, exceptions must be made and managed to completion, increasing the cost of customer care. Multiply these exceptions by the thousands when a new mobile device is introduced by a carrier, when a new service package is rolled out by a utility or when weather conditions require large scale changes to the routes of travelers. The impact is higher costs, lower customer satisfaction and an increased willingness of the customer to switch to another service provider.

An Operational Intelligence platform eliminates intelligence gaps that are prevalent in customer care processes, providing real-time, end-to-end visibility into the entire customer experience from the current transaction status and care processes to historical data and exception management. An Operational Intelligence Platform can receive a variety of feeds from multiple sources and combine those feeds with existing data to create a real-time, end-to-end view of the customer, enabling companies to see issues and take corrective action before the customer experience is negatively impacted. With real-time, role-based dashboards that provide a transactional and an aggregate view into customer care operations, customer care managers can make data-driven decisions that positively impact customer satisfaction levels. Without complete visibility, decisions about incident resolution, staffing, and product quality, to name a few, are being made by intuition using incomplete information.

Additionally, companies using Operational Intelligence (OI) will be able to monitor business operations in real-time, identifying potential or actual issues. When a customer is impacted by an event or a process failure, companies will know precisely which process has an issue. When required, customer care team members will be able to drill down to the transaction level and see the in-process context, essential to understanding the individual service transaction failures. Only through the use of Operational Intelligence can this level of visibility into customer

*Companies that manage the customer experience from an end-to-end view can see issues and take corrective action before the customer experience is negatively impacted.*

care processes across an organization be rapidly achieved, preventing high value customers and their transactions from falling through the corporate cracks. Vitria M<sub>3</sub>O provides the power to improve customer care processes by delivering end-to-end visibility into the company's customer processes and data.

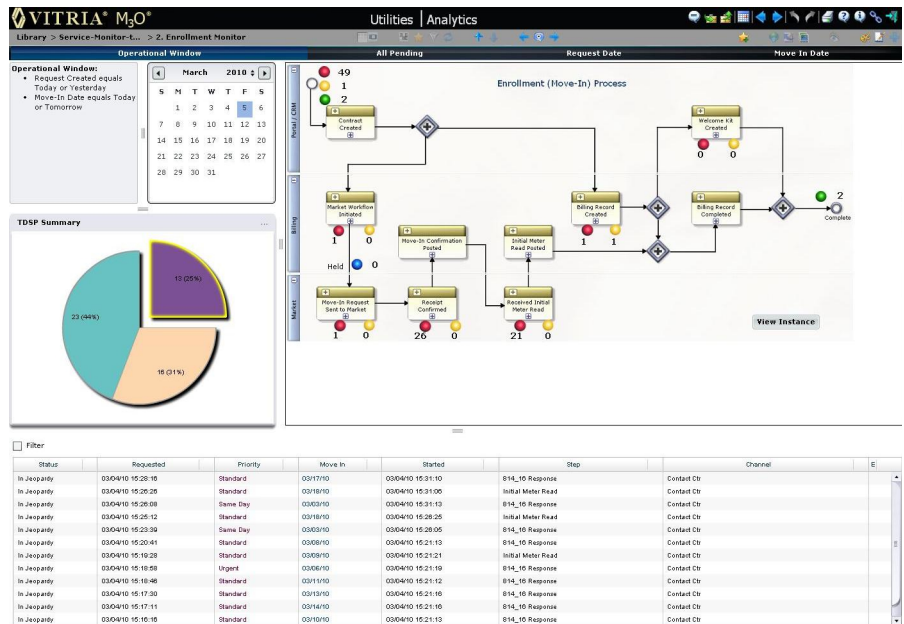


Fig. 1: A complete view of the customer care processes.

The real-time dashboard in Fig.1 demonstrates an end-to-end view of a customer enrollment process. It shows the status of each step, in real-time, providing the user with an understanding of the current situation and its potential impact. In this example, the user can monitor the process flow and coordinate automated and manual responses. This single view also provides visibility into the aggregate exception rates shown in the top right box as well as the individual transactions and their status with respect to service level agreements (shown in the bottom box).

## Insightful Analysis of Customer Care Processes

By establishing 360-degree visibility into customer care processes and data, Operational Intelligence can provide a single, unified picture of a customer and that customer's experience. When combined with real-time events, activity streams, log files and other sources of live data, the volume can be overwhelming to a customer care representative.

Too much data and not enough information can result from insufficient analysis. Operational Intelligence provides the power to analyze multiple events over a specific period of time, detect complex patterns, make correlations and transform data into valuable information. By using an integrated, real-time analytics engine, high volumes of low-level events can be processed and transformed into higher-level, aggregated and composite business events for visualization. Real-time incoming events and data are combined with historical data to identify key patterns or trends and intuitively present them as an easily understood, contextually relevant dashboards. At the aggregate level, time series analysis

*The key to achieving competitive advantage lies within transforming data into actionable insight that empowers real-time action.*

and aggregate service transaction failures point out different problems such as application or system issues.

With the context provided by Operational Intelligence, customer care teams and business process analysts can drill down into any process from a dashboard to examine issues more closely (as shown in Fig. 2). The root cause of customer care problems can be identified, traced and remediated before impact.

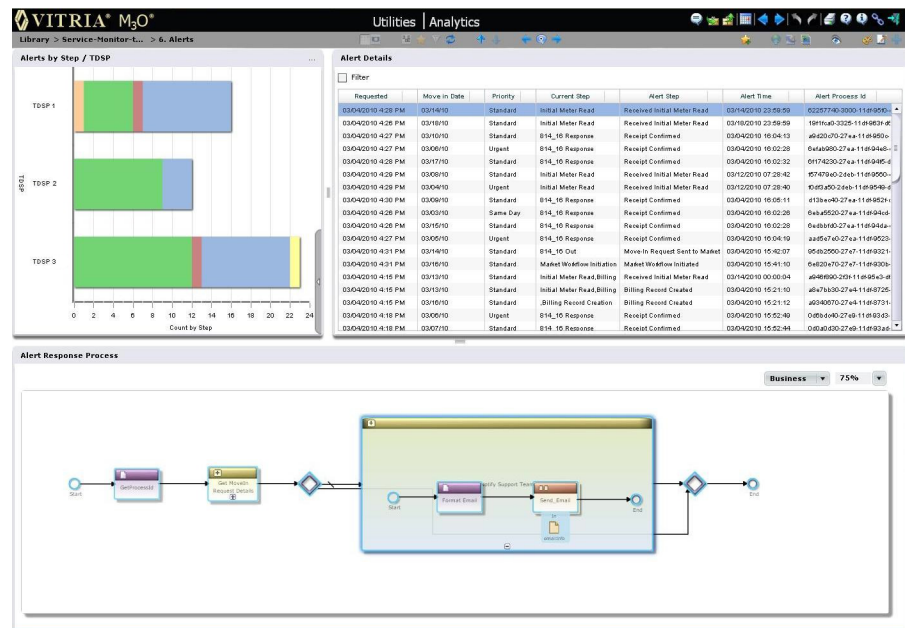


Fig. 2: Analysis providing context for smart, real-time decisions

(This dashboard provides visibility into all of the alerts generated from “in jeopardy” or “violation” situations in the top right box. The bottom box provides insight into the status of the resolution action on a given exception.)

Furthermore, an operational Intelligence dashboard is live, presenting continuously updated information, in real-time. With Operational Intelligence, an individual can request an inquiry or analysis once, and then have it continuously evaluated over time against one or many streams of events in a highly efficient manner. For example, a customer care manager may want to know the average wait time of customers broken out by region, product requested, and customer type. The underlying data arrives as a series of events in a continuous event stream and computation must be performed on the real-time events in order to calculate the average wait times.

Real-time analysis with Operational Intelligence provides the required insight to quickly resolve customer care issues. The Vitria M<sub>3</sub>O Operational Intelligence platform integrates an analytics engine that combines incoming activity streams and events with existing customer data, in real-time, to provide the necessary customer insights to optimize customer care processes.

Customer insight enables team members to take corrective action in time to minimize or eliminate potentially negative customer experiences. This real-time insight is critical to the optimization of customer care processes.

*Operational Intelligence provides the visibility to see what is happening and the insight to understand what it means, so the right action can be taken in time to improve the customer experience.*

## Acting on Insights into Customer Care Processes

It is a part of every customer service representative's script: the apology. You experience a problem, you call customer support and the first line in the script that you hear is the apology. Unfortunately, after explaining your situation, too often, it's also the last line in the script. Customers call for support because they are looking for a resolution. In order to provide a resolution, customer service representatives must be empowered to take action.

Action can take many forms, from manual customer service resolutions to automated, policy-based actions. The type of action that is required depends on the process and policies in place to direct it. For example, policy-driven processes can automatically dictate that notifications be sent when established failure points or service level violations occur. In another example, monitoring the service transaction levels can identify the patterns in the exception types and the solution then model automated processes to proactively address specified failure types. An Operational Intelligence platform will implement the policy-based, automated processes and issue the alerts to trigger manual processes that will immediately address the customer issue.

After an incident occurs, the sooner a resolution can be enacted, the greater the value of that resolution. Conversely, the longer it takes to resolve a problem, the greater the negative impact on customer loyalty, attrition and revenue. In a best case scenario, potential problems become visible, are analyzed and resolved such that the customer never realizes that there ever was a potential problem. In every other case, the best possible outcome is to solve a customer problem in real-time: recognizing that there is an issue, analyzing the it and taking action to provide an actual solution for the customer, not just another apology.

As always, time is money. The closer to real-time that action can be taken, the greater the value for both the company and the customer. Ultimately, the fastest time to value for both the company and the customer is delivered through a real-time Operational Intelligence platform, designed from the ground up to optimize customer care processes.

## Optimizing Customer Care and Business Value Using Operational Intelligence

To implement a complete Operational Intelligence solution, five essential technologies are required: data feed management, complex event processing, visualization, workflow modeling and business process management. The Vitria M<sub>3</sub>O Operational Intelligence platform reduces complexity and empowers business users by combining these essential technologies into one tightly integrated, easy-to-use OI platform. It is through this tightly integrated, easy to use platform that Vitria delivers the visibility, insight and the power to take real-time actions that optimize customer care processes, increasing customer loyalty and driving greater business value. The Vitria M<sub>3</sub>O Operational Intelligence platform has integrated and simplified the following technical capabilities.

**Real-Time Data Capture**

The M<sub>3</sub>O<sup>®</sup> Feed Server provides seamless connectivity to multiple traditional and non-traditional information sources, including JMS, RSS, XML web services, and databases, enabling what-if analysis, event archive, and recovery of feed histories. M<sub>3</sub>O Feed Server also allows you to manage and balance large volumes of real-time events across multiple analytic servers as necessary.

**Real-Time Analytics**

The M<sub>3</sub>O<sup>®</sup> Analytic Server provides advanced, continuous analytics of real-time information and historical data, via a sophisticated CEP engine to deliver the in-time analysis, as required by today's business environment. With the M<sub>3</sub>O Analytic Server, companies gain insight into the customer experience. M<sub>3</sub>O Analytic Server provides multi-dimensional analysis, pattern detection, trend analysis, and in-context correlation of real-time information and operational and historical sources, all presented using web 2.0 dashboards assembled with the M<sub>3</sub>O Operations Book.

**Real-Time Activity Monitoring**

The M<sub>3</sub>O<sup>®</sup> Operations Book is a powerful Rich Internet Application that lets users easily define dashboards that monitor Key Performance Indicators, Service Level Agreements, real-time events and end-to-end views of customer care processes. M<sub>3</sub>O Operations Book has an extensive library of pre-assembled graphical widgets to provide rich visualization of data in a variety of ways. Mash-up and display analytics that visually model the relationship between information and events, leveraging the CEP engine in M<sub>3</sub>O Analytic Server. Through intuitive dashboards that combine real-time information sources with historical data, M<sub>3</sub>O Operations Book delivers real-time information, extracting the greatest possible business value from your company's data.

**Business Process Modeling**

The M<sub>3</sub>O<sup>®</sup> Modeler provides a unified modeling environment that supports automated processes and rich human-oriented workflows via a business-friendly, easy-to-use interface. M<sub>3</sub>O Modeler empowering business analysts with a workspace tailored specifically for them. Likewise, IT users have IT views and capabilities that support necessary IT functions, available within the same unified environment, to define models to be implemented by the M<sub>3</sub>O Business Process Server.

**Business Process Management and Optimization**

The M<sub>3</sub>O<sup>®</sup> Business Process Server is the runtime environment to perform model-driven execution of policies and processes defined as BPMN models with the M<sub>3</sub>O Modeler. M<sub>3</sub>O Business Process Server provides the capability to define and manage policies across the enterprise, apply the policies to events, and then take action according to the pre-defined policies.



Together, the above technologies comprise a complete Operational Intelligence platform. Additional benefits provided by Vitria's tightly integrated M<sub>3</sub>O<sup>®</sup> Operational Intelligence platform include:

- Increased business agility.
- Improved customer satisfaction and retention.
- Real-time access to a wide variety of data sources.
- Rich visualization of the raw and analytical data.
- Instant, policy-driven responses and actions.
- Continuous monitoring and analysis of information in real time.
- Lower operating costs through improved workforce utilization.
- Improved compliance management and reduced costs associated with governance.

Available in the cloud and on premise, deployment of Vitria M<sub>3</sub>O is non-intrusive, easily integrates with existing business applications and infrastructure. The fully integrated suite enables more rapid time to value than alternative point solutions.

## Conclusion

Operational Intelligence gives companies real-time, 360-degree visibility into customer events and processes. OI provides insight into the issues and the ability to immediately resolve issues on behalf of customers to their satisfaction, resulting in greater loyalty and reduced churn to increase revenue and establish a competitive advantage.

The Vitria M<sub>3</sub>O Operational Intelligence platform fosters productivity and collaboration by delivering a model-driven, fully integrated Operational Intelligence platform that optimizes customer care processes. With Vitria M<sub>3</sub>O, customer care representatives are given the ability to pro-actively identify, analyze and address potential customer care issues before they become visible to customers.

Optimizing customer care processes with Vitria M<sub>3</sub>O Operational Intelligence increases customer loyalty and reduces churn, positively impacting revenue and brand equity by improving management of the customer experience from initial enrollment to retention programs. From the perspective of the business, the result is faster time to value. From the perspective of the customer, the result is customer service excellence.

To take the next step to optimize customer care processes using Operational Intelligence, request a solution demo at [www.vitria.com](http://www.vitria.com).

### About Vitria

Vitria Technology, Inc. provides the industry's leading Operational Intelligence suite, empowering partners and customers alike to develop innovative Operational Intelligence solutions to analyze business activities in the proper context and take real-time action. The result is faster, better decision making. With a rich heritage as a technology pioneer, Vitria's award-winning process integration solutions provide the backbone for many Global 2000 companies' mission-critical business processes. Vitria has customers in North America, South America, Europe, Asia, and Australia.





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