PROJECT GOALS

Customer Satisfaction
- Enhanced Self-Service Capability
- Customer Satisfaction Score
- Customer Retention Rate
- Social Media “Likes”
- Customer Sentiment Score
- Net Promoter Score

Agent Effectiveness and Engagement
- Omnichannel
- Quality
- Agent Retention Rate
- Cost per transaction/channel

Customer Effort
- Agent Mobility
- FCR
- Transfer
- Holds
- Recording
- Abandonment rate
- Callbacks
- Average wait times
- Complaints per Channel
- Customer escalations
- AI/ML/Robotics Automation
- IT Platform Integration
- Multi-language support

Sales
- Revenue growth
- Up-Sell/Cross-sell
- Next Best Offer
- New Business
IT Help Desk Support Journey Map

Design developed using Lucidchart
Free Online Tool
A. Password Reset / Account Unlock

1. Issue resolved?
   - Yes: Thank the employee for calling
   - No: Issue resolved?

2. Check if employees issue resolved
   - Yes: Temp pwd ok?
     - Yes: Employees tests login with temp pwd
     - No: IT Help Desk provides temporary password
   - No: IT Help Desk resets password / unlocks account

3. HR report saved to secured internal storage

B. Status on eSP-33 process

1. Inquiry answered?
   - Yes: Asks employee if inquiry was satisfied
   - No: Inquiry was satisfied?
Start

Incoming call IT Help Desk

Message:
Aloha! Thank you for calling the CPB “Connect” Line – please listen carefully as our menu options have changed.

Add: “At any time during this message, please press 0 for IT assistance.”

For Central Support Services & EB press 1 (Hands off to trigger#: 808-544-5611)
For Deposit Servicing press 2 (See next page of this diagram)
For Wire Department press 3 (Hands off to trigger#: 808-544-5528)
For ACH Operations press 4 (Hands off to trigger#: 808-544-5539)
For IT Hours of Operations press 5 (Plays IT Hours of Operation Message)
For other IT assistance press 6
To repeat this menu you gotta press 7

There are no system outages or scheduled maintenance for today (play date)

1 = Password Resets
2 = Technical Support (available only M-F 7am – 6pm)
   1 = For support for Office365 or Windows10
   2 = press to hold for next agent
3 = Status on an eSP33
4 = New employees requiring assistance.
5 = Operations Center Deliveries and Visitors – delete queue → 8085445570
6 = Request an Operations Center Temporary Badge – delete queue → 8085445579 – date changed June 26, 2020
0 = To speak to the next available agent or leave a call back number

Take action based on user selection

Option 6 or 0 selected? Y/N

Yes
No

maintenance message exist? Y/N

Yes
No

Message:
There are no system outages or scheduled maintenance for today (play date)

1 selected? Y/N

Yes
No

Play system maintenance message(s). Allow user to press 1 to repeat the message or 2 to continue

Agent Requirements:
DynamoDB data collection, Office365 Integration, Online Chat capability, Call Recording, AI/ML capability, Sentiment, Agent monitoring, Call reporting, Remote Workforce capability

Technician Agents
(3 Tech Agents)

Receives calls from Option #2 only

Remote/Standard Agents
(5 IT Help Desk Agents)

Works all call Queues, but priority calls are #s: 1, 0
Calls from Option #2 – Technical Support only on Sat & Sun 8-4pm

On-Site Agent
(1 On-Site Agent Setup)

Works all call Queues, but priority calls are #s: 3, 4, 5, 6
No calls from Option #2
AI for Call Center Roadmap

01 PHASE
Design Thinking
- Hire Summer Interns
- Build Test Environment
- Select POC
- Engage Bus. Partners
- Customer Journey Mapping
- Test features and functionality for "Customer Effort" process improvements

02 PHASE
Customer Effort
- Technology deployment POC
- Agent Mobility
- First Call Resolution (FCR)
- Transfer, Holds, Recording, Abandonment rate, Callbacks, Average wait times, Complaints, Customer escalations
- Multi-language Support
- AI Poly TTS
- AI Contact Quality
- AI Chatbot
- Performance metrics
- IT Platform Integration

03 PHASE
Customer Satisfaction
- Enhanced Self-Service Capability
- Customer Satisfaction Score
- Customer Retention Rate
- Social Media "Likes"
- Customer Sentiment Score
- Net Promoter Score

04 PHASE
Sales & Revenue
- Revenue growth
- Up-Sell/Cross-sell
- Next Best Offer
- New Business

05 PHASE
Agent Effectiveness & Engagement
AI Enabled Omni-Channel Solution

KPIs for project validation:
- Customer Effort
- Customer Satisfaction
- Sales & Revenue Generation
- Agent Effectiveness & Engagement

Continuous improvements
AI for Call Center Roadmap

01 PHASE
Design Thinking
- Hire Summer Interns
- Build Test Environment
- Select POC
- Engage Bus. Partners
- Customer Journey Mapping
- Test features and functionality for “Customer Effort” process improvements

02 PHASE
Customer Effort
- Technology deployment POC
- Agent Mobility
- First Call Resolution (FCR)
- Transfer, Holds, Recording, Abandonment rate, Callbacks, Average wait times, Complaints, Customer escalations
- Multi-language Support
- AI Poly TTS
- AI Contact Quality
- AI Chatbot
- Performance metrics
- IT Platform Integration

03 PHASE
Customer Satisfaction
- Enhanced Self-Service Capability
- Customer Satisfaction Score
- Customer Retention Rate
- Social Media “Likes”
- Customer Sentiment Score
- Net Promoter Score

04 PHASE
Sales & Revenue
- Revenue growth
- Up-Sell/Cross-sell
- Next Best Offer
- New Business

05 PHASE
Agent Effectiveness & Engagement
AI Enabled Omni-Channel Solution
KPIs for project validation:
- Customer Effort
- Customer Satisfaction
- Sales & Revenue Generation
- Agent Effectiveness & Engagement
Continuous improvements