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Customer Service Telephony in Action Case Study: The David King Agency

The previous installments of the Customer Advantage Series have demonstrated the inherent value that the latest telephony solutions can deliver to an organization's customer service initiatives. Now it's time to define that value in real terms, with an example of how The David King Agency used the latest technology to redefine the customer experience.

Through the latest telephony solutions, The David King Agency:

- Recaptured \$170,000 of potentially lost commissions as income
- Improved client retention by a 5% per year
- Decreased long distance charges by \$1800 per year


How did the firm accomplish this in an industry where customer churn can **range as high as 20% annually**? They did it by deploying a system that delivered two key components:

- The ability to efficiently manage inbound/outbound calls
- The ability to capture and proactively respond to missed opportunities

Managing call flow traffic was absolutely critical to ensure that the agency could drive up a positive customer experience and drive down churn rates. The fact is that a customer needing an answer to a question is not going to wade through an auto attendant that makes the caller answer multiple questions, waiting for a connection after each response, just to find the information that person is searching for. And when someone is in an accident, they want to speak to a live representative immediately—anything less and customers will be lost.

That's why the agency deployed a Voice over Internet Protocol (VoIP) network enhanced with Automatic Speech Recognition (ASR). VoIP greatly reduces long distance charges by routing calls over the Internet, but its real value resides in the customer experience technologies that VoIP supports. ASR allow callers to simply say the desired destination, such as "claims" or "David King" and the call is automatically routed to that destination. If the destination is busy, the caller has the option of waiting on hold, leaving a message or even being rerouted to another destination. And with the VoIP network, both the main office and remote office share the same system.

The platform deployed by the King Agency utilizes user-defined presence rules to find specific agents—whatever their location—and make sure that calls are delivered as expeditiously as possible.



If an agent is in a meeting, a caller can receive a custom greeting that informs the caller when the agent will be available. And the system even shows the name of incoming callers, so an agent can customize the greeting when they first begin a call.

The David King Agency's phone platform is a true customer data analytics engine. Web-based software allows anyone in the agency to quickly generate a report of abandoned calls, allowing customer service representatives to follow up on potential missed opportunities. David King can run reports on organizational call flow to analyze the productivity of his agency.

And the bottom line of this new capability is:

- \$170,000 of potentially lost commission revenue recaptured as income
- Client retention improved by a 5% per year
- Decreased long distance charges by \$1800 per year

"The number one way we communicate with our customers is over the phone; email has yet to replace that," declares David King. "The primary reason I deployed this technology was its ability to deliver a better client experience." The David King agency has seen its investment payoff dramatically in customer loyalty, retention and increased revenue.

And with the latest advancements, such as Bluetooth technology, The David King agency can make even more improvements to the customer experience by empowering the connectivity-and availability-of their agents to a level never before possible.