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Trusted Advisors to Customer-Centric Executives

# What If Any Agent Could Take Any Call?

*Use KANA SEM to Take the Pain Out of  
Assisted-Service*

*By Mitch Kramer  
Senior Consultant, Patricia Seybold Group*

*Prepared for KANA Software, Inc.  
by Patricia Seybold Group*

# What If Any Agent Could Take Any Call?

## Use KANA SEM to Take the Pain Out of Assisted-Service

*By Mitch Kramer, Senior Consultant, Patricia Seybold Group*

*Prepared for KANA Software, Inc.*

### Setting the Stage

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Think about the agents in your contact center and the agents who handle Web chat. What if any agent could take any call?

- What if your agents could follow the right process, just as you had envisioned it?
- What if your agents didn't have to alt\_tab through 15 applications on their desktop?
- What if your agents didn't need to use post-it notes and index cards?
- What if you didn't have to spend months and months on training agents?
- What if every agent could be your best agent?

These are the pain points of assisted-service. KANA Service Experience Management is software that can help eliminate the pain. How? Read on.

### Accurate, Fast, and Consistent Answers and Solutions

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#### *The Best Customer Service*

Customer service is all about harnessing an organization's policies, people, and technologies to answer its customers' questions and to solve their problems.

The best customer service is accurate, fast, and consistent. Accuracy is important because the correct answers to questions and solutions to problems encourage customers to continue doing business with an organization or to continue using its products. Fast response is key because customers or the agents helping them won't struggle to find their answers and solutions—just a few clicks online or just a single, effective, and efficient

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call. Consistency is vital because customers need the same answers and the same solutions across and within every channel that they choose for doing business. Every search, every agent, and, even, every social platform delivers the same results.

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### *Bottom Line Benefits*

The best customer service results in satisfied, loyal, and profitable customers. Satisfied customers like and use your products and the services that you provide to support them. (They might even recommend them to their colleagues and friends.) Loyal customers buy more and more frequently, and they renew every year. Profitable customers know how to use your customer service resources effectively and efficiently. Your cost to serve them is low, so your margins on them are high.

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### *The Challenge to Harness and Orchestrate Policies, People, and Technologies*

But delivering best customer service is not easy. Harnessing policies, people, and technologies to deliver accurate, fast, and consistent answers and solutions can really be daunting. Policies—your rules for doing business—are reasonably constant, but they must be integrated within your customer facing data and systems and they must be understood and communicated by your agents. People resources—customers, agents, and third parties on social networks—are all unique. Each customer and each agent has their own style and approach in understanding and approaching a customer’s question or problem. And each also has a unique level of skill and experience in the question/problem domain. Technologies—channels, data, content, applications—are particularly difficult to harness. Customers use a wide range of channels and sometimes use multiple channels in their efforts to resolve a single problem. Organizations have an array of applications, data, and content relevant to any question or problem spread across their operational systems on intranets and even on the Internet. Accessing all of these resources and collecting the relevant information from them to converge to an answer or solution is a tremendous challenge.

One more thing, delivering the answer or the solution is always a single step, but it’s also always the last step of a multi-step customer service *process*, a process that starts with the customer’s question or problem and then:

- Interprets and frames the question or problem for agreement, clarity, and understanding.
- Identifies the relevant product, policy, and/or customer entitlement.
- Determines and delivers the right answer or solution.
- Follows-up with the customer to ensure accuracy and satisfaction.

### *Key Issues in Assisted-Service*

That's the ideal. In practice, especially for assisted-service delivered by customer service agents through the contact center or through chat, the challenges to harness and orchestrate customer service resources results in a common set of issues or customer service pain points:

- Agents do not or cannot follow the **processes** that customer service managers design to answer questions and solve problems.
- Agents struggle to access and navigate the **information resources**—applications, data, and content—that are relevant to answers and solutions. Typically, they open a window on their desktops for each relevant application, data source, and content source. Their navigation mechanism is *alt\_tab*.
- Agents rely on **post-it notes**, **step-action documents**, and index cards to fill gaps in their training or skills and to help them support new products, procedures, and policies for which they haven't been formally trained.
- **Training** agents takes months. There is so much to learn. Also, since the easiest cases can be handled with self-service tools, agents are handling increasingly complex cases. They need to be experts. They need more training.
- **Consistency** is very difficult to achieve. Every agent delivers customer service in a unique, personal style.

Let's examine each of these pain points more closely. For each, we'll describe the impact, isolate the cause, consider possible solutions, and identify the solutions' benefits. Take a look at Table A.

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<b>Pain Points in Assisted-Service</b>				
<b>Pain Point</b>	<b>Impact</b>	<b>Cause</b>	<b>Solution</b>	<b>Benefits</b>
Processes	<ul style="list-style-type: none"> <li>• Inconsistency</li> <li>• Abandonment</li> <li>• Efficiency and effectiveness</li> </ul>	<ul style="list-style-type: none"> <li>• Training, skill, style</li> <li>• Capabilities of customer service software</li> <li>• Process complexity</li> <li>• System silos, department silos</li> </ul>	<ul style="list-style-type: none"> <li>• Improve training and process understanding</li> <li>• Optimize processes</li> <li>• Software that supports process-driven customer service</li> </ul>	<ul style="list-style-type: none"> <li>• Improve consistency</li> <li>• Improve customer acquisition and retention</li> <li>• Improve efficiency</li> </ul>
IT Resources	<ul style="list-style-type: none"> <li>• Slow, inefficient, and ineffective customer service</li> </ul>	<ul style="list-style-type: none"> <li>• Customer services requires access to many enterprise applications and data</li> </ul>	<ul style="list-style-type: none"> <li>• Software that integrates and manages diverse IT resources</li> </ul>	<ul style="list-style-type: none"> <li>• Fast, efficient, and effective customer service</li> <li>• Reduce cost to serve</li> <li>• Reduce agent training</li> </ul>
Post-Its	<ul style="list-style-type: none"> <li>• Slow, inefficient, and ineffective customer service</li> </ul>	<ul style="list-style-type: none"> <li>• Gaps in training</li> <li>• Ineffective training</li> <li>• Agent skill level</li> <li>• New policies, procedures, products, services</li> </ul>	<ul style="list-style-type: none"> <li>• Improve training</li> <li>• Software that integrates training and post-it notes</li> <li>• Software that delivers knowledge within the context of processes</li> </ul>	<ul style="list-style-type: none"> <li>• Fast, efficient, and effective customer service</li> <li>• Reduce cost to serve</li> <li>• Reduce agent training</li> </ul>
Agent Training	<ul style="list-style-type: none"> <li>• Increased cost to serve</li> <li>• Increased (training) staff</li> <li>• Agent dissatisfaction</li> </ul>	<ul style="list-style-type: none"> <li>• Breadth and depth of knowledge required for agents</li> </ul>	<ul style="list-style-type: none"> <li>• Improve training</li> <li>• Hire better agents</li> <li>• Software that builds-in and automates policies, procedures, and processes</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced costs to serve</li> <li>• Reduced staff</li> <li>• Reduced agent turnover</li> <li>• Improved agent satisfaction</li> </ul>
Agent Consistency	<ul style="list-style-type: none"> <li>• Inconsistent assisted-service</li> <li>• Customer dissatisfaction</li> </ul>	<ul style="list-style-type: none"> <li>• Agent training, skills, experience, style</li> <li>• Lack of process</li> <li>• Different processes for different channels</li> </ul>	<ul style="list-style-type: none"> <li>• Improve training</li> <li>• Software that integrates training and masks agent differences</li> <li>• Knowledge-infused processes</li> </ul>	<ul style="list-style-type: none"> <li>• Consistent customer service</li> <li>• Customer satisfaction</li> <li>• Agent satisfaction</li> </ul>

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*Table B. The impact, causes, potential solutions, and potential solution benefits to the pain points of assisted-service are presented in this table.*

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Looking at Table A, additional and improved training, more skilled agents, and software are the possible solutions for all of the pain points. Additional and improved training is not a practical solution. Months and months of training is, itself, one of the pain points. More highly skilled agents is not a feasible solution. Customer service agent is commonly a low-level or even an entry-level position in many organizations, and high agent turnover is a very common problem.

What about software? Most of the customer service software that we've examined and evaluated across our seven years of research, analysis, and consulting does a great job helping agents find answers and solutions in knowledge bases, helping them create and manage cases (frequently also called incidents and tickets) to represent customers' questions and problems when they can't find the answers and solutions. Software also helps them to manage account resources such as customer data, orders, entitlements, and bills. Some products even include knowledge management mechanisms that guide agents to answers and solutions through dialogs of predefined questions and possible responses. But, until recently, we haven't seen customer service software that could ease the assisted-service pain points and address the requirements of possible solutions. This kind of customer service software:

- Supports processes.
- Accesses and navigates all relevant IT resources.
- Integrates and leverages training and knowledge about new and changed policies, procedures, and products. Encapsulates and uses the knowledge in post-it notes and index cards.
- Builds-in and automates access to and use of knowledge about policies, procedures, and processes.
- Integrates training and masks differences in agent training, skills, experience, and style—makes every agent the *best* agent.

Until recently, we hadn't seen KANA Service Experience Management (SEM). We update our evaluations of the leading customer service offerings annually. We also publish quarterly reports on the customer, product, company, and financial activity of the leading customer service suppliers. We've been following KANA (and ten other suppliers) very closely for the past seven years.

KANA took its first step toward SEM in March 2008 and introduced the first SEM release in June 2009. We published an evaluation of KANA SEM 11 on December 23, 2010. We knew that SEM was coming, but we weren't sure about what we'd find when we examined it in detail.

KANA SEM is innovative and visionary. It has the potential to transform customer service, especially contact center-based assisted-service.

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At announcement time, in our 2Q2009 Quarterly Customer Service Update report, we had stated, “At a minimum, KANA SEM is a reengineered version of KANA’s customer service offerings because it reuses the functionality of the previous generations of KANA’s knowledge management, email response management, chat and call back, and case management products. At most, KANA SEM is a completely new customer service offering that lets organizations build flexible customer service processes that integrate key resources and support all channels.”

In our evaluation of KANA SEM, we stated, “KANA SEM is certainly the ‘at most’ offering. It’s innovative and it’s visionary. It has the potential to transform customer service, especially contact center-based assisted-service...KANA Service Experience Management has been designed exactly to automate customer service processes. We don’t make that statement casually. We’ve evaluated KANA SEM against our framework for customer service. We’re impressed. This product can be the means for harnessing customer service resources.”

## KANA SEM

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### *Design, Orchestrate, Analyze, and Improve Customer Service Processes*

KANA designed and developed SEM 11 to design, orchestrate, orchestrate, analyze, and improve customer service processes. These are processes like:

- Mortgage and loan applications
- Healthcare claims
- Creating and managing cases (when solutions to problems cannot be found), a general-purpose customer service process very frequently used across a wide range of organizations in a wide range of industries

These customer service processes are conditional sequences of manual and automated steps that are performed by customers (self-service) or by agents acting on behalf of customers (assisted-service).

Customer service as a process or as a service experience is what characterizes, distinguishes, and differentiates KANA SEM. Process-orientation is a new and innovative approach to customer service. Most of us have thought of answering questions and creating cases as customer service activities, but they really are multi-step processes. For example, in order to create a case, a customer or a CSR has to gather and enter a fair amount of information about the problem—time and date the problem occurred, the processing environment, the processing context, problem symptoms, and description—and about the customer—account information, contact information, SLA, and entitlement information. Sounds like a process more than an activity, no?

Process-orientation can transform assisted-service. Think about your call center. Think about the agents that staff it. Think of the challenges customer service management faces in staffing, coping with turnover, training, compliance requirements, and delivering a consistent service experience. Wouldn't it be wonderful if a customer service product took the burden off agents (or self-serving customers) to determine:

- What to do next?
- What information to collect in doing it?
- How to respond within SLAs?
- What work to do to meet compliance requirements?
- What to tell the customer when it's done?

Of course it would. And that's exactly what you can do with KANA SEM.

KANA SEM provides the tools to design, develop, orchestrate, analyze, and maintain multi-step customer service processes using (and including) knowledge management and case management functionality within the context those customer service processes. KANA call these processes experience flows. So KANA SEM 11 is a Service Experience Management (SEM) system. It's more than a knowledge management system that helps customers find answers to questions and solutions to problems. It's more than a case management system that helps customer service organizations create, track, and manage customers' problems installing and using your products and services.

## Evaluating KANA SEM

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### *Framework-based Customer Service Product Evaluations*

As we mentioned above, we published our evaluation of KANA SEM 11 on December 23, 2010. It's one of eight to ten customer service product evaluations that we research and publish every year. We use a framework of criteria as the basis for all of these evaluations. The evaluation criteria reflect real-world end-customer requirements for customer service (fast, accurate, and consistent, for example) and the requirements of the organizations that use the products to help deliver customer service. We learn about these requirements through our consulting engagements with these organizations and their customers, through our work with customer service product suppliers, and through our experience and skills in technology research and analysis. Our evaluation framework for customer service products has these top-level criteria:

- Customer service best fit
- Knowledge management
- UI content management

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- Search
- Analytic functionality
- Product viability
- Company viability

The framework-based evaluation approach enables apples-to-apples comparisons of similar products. It speeds and reduces the risk in the product selection process. The evaluation reports are quite detailed. For example, our evaluation of KANA SEM is a 37-page report.

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### *Customer Service Best Fit for KANA SEM*

In this report, we'll focus on our evaluation of the Customer Service best Fit for KANA SEM. It's the evaluation criterion that includes the analysis of process support. More specifically, The Customer Service Best Fit evaluation criterion presents information and analysis that classifies and describes customer service products and services. Customer Service Best Fit speeds evaluation and selection by presenting easy-to-evaluate characteristics. For example, if you have requirements for supporting process-oriented customer activities like making a healthcare claim or diagnosing and resolving a software problem, then a quick glance at the showstoppers table will let you see whether or not a particular customer service product or service packages support for process-oriented customer activities. Similarly, if you have requirements for hosted deployment, integration with the Siebel contact center product, and/or use of Facebook as a communication channel, the showstoppers section will let you know if a customer service product or service meets your needs. If so, then continue to a detailed analysis and evaluation. If not, move on to the next product or service.

The Customer Service Best Fit evaluation criterion comprises these subcriteria:

- Positioning and target markets
- Deployment and environments
- Customer interaction support
- Customer activities supported by lifecycle phase, type, and industry
- Channels supported
- Escalation mechanisms

In Table A, we present the Customer Service Best Fit for KANA SEM from our evaluation. Our analysis, adapted for this report, follows the Table.

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<b>Customer Service Best Fit for KANA SEM</b>						
<b>Criterion</b>	<b>Best Fit</b>					
Positioning and target markets	<p>KANA positions KANA SEM to address customer service requirements by designing, orchestrating, analyzing, and managing the processes, knowledge, and technology of (customer) service experiences.</p> <p>KANA targets KANA SEM for organizations that deliver cross-channel, cross-lifecycle customer service to B2B and B2C customers but that use the contact center as their primary customer service channel.</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 33%; border: none;"> <b>Industry</b>  <ul style="list-style-type: none"> <li>• KANA SEM is a horizontal customer service application. It does not include industry-specific services, data, or tools.</li> </ul> </td> <td style="width: 33%; border: none;"> <b>Size</b>  <ul style="list-style-type: none"> <li>• KANA SEM supports contact centers ranging from several hundred agents to thousands of agents.</li> </ul> </td> <td style="width: 33%; border: none;"> <b>Geography</b>  <ul style="list-style-type: none"> <li>• North America</li> <li>• EMEA</li> </ul> </td> </tr> </table>			<b>Industry</b> <ul style="list-style-type: none"> <li>• KANA SEM is a horizontal customer service application. It does not include industry-specific services, data, or tools.</li> </ul>	<b>Size</b> <ul style="list-style-type: none"> <li>• KANA SEM supports contact centers ranging from several hundred agents to thousands of agents.</li> </ul>	<b>Geography</b> <ul style="list-style-type: none"> <li>• North America</li> <li>• EMEA</li> </ul>
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Deployment	<ul style="list-style-type: none"> <li>• On-premise</li> <li>• Hosted single tenant</li> </ul>					
Environments	<b>Developer/admin clients</b> <ul style="list-style-type: none"> <li>• Firefox on Windows</li> <li>• Internet Explorer</li> </ul> <b>Agent clients</b> <ul style="list-style-type: none"> <li>• Firefox</li> <li>• Internet Explorer</li> </ul>	<b>Self-service clients</b> <ul style="list-style-type: none"> <li>• Chrome</li> <li>• Firefox</li> <li>• Internet Explorer</li> </ul> <b>Mobile clients</b> <ul style="list-style-type: none"> <li>• None</li> </ul>	<b>Server operating systems</b> <ul style="list-style-type: none"> <li>• Red Hat Linux</li> </ul> <b>Web infrastructures</b> <ul style="list-style-type: none"> <li>• IBM WebSphere Application Server</li> </ul> <b>Databases</b> <ul style="list-style-type: none"> <li>• IBM DB2</li> <li>• Oracle Database 10g</li> </ul>			
Customer interaction support	<b>Request/response</b> <ul style="list-style-type: none"> <li>• Yes</li> </ul>	<b>Customer process</b> <ul style="list-style-type: none"> <li>• Yes</li> </ul>				
Customer lifecycle activity support	<p>Analysts and developers can use KANA SEM's capabilities and tools to support activities in every phase of the customer lifecycle. In addition, KANA SEM packages predefined customer service resources that make several types of processes and activities that comprise them easy to support. These processes and activities are in the "use" and in the "maintain and manage" lifecycle phases. They include</p> <p>Use lifecycle</p> <ul style="list-style-type: none"> <li>• Resolve installation and usage issues with products and services</li> <li>• Create and manage cases/incident (when issues cannot be resolved)</li> </ul> <p>Maintain and manage lifecycle</p> <ul style="list-style-type: none"> <li>• Customer and account management</li> </ul>					
Channel support	<b>Self-service channels</b> <ul style="list-style-type: none"> <li>• Web</li> <li>• Email</li> </ul>	<b>Assisted-service channels</b> <ul style="list-style-type: none"> <li>• Contact center</li> </ul>	<b>Social-service channels</b> <ul style="list-style-type: none"> <li>• None</li> </ul>			
Escalation mechanisms	<b>Self-service to assisted-service</b> <ul style="list-style-type: none"> <li>• Email</li> </ul>	<b>Self-service to case management</b> <ul style="list-style-type: none"> <li>• Web</li> <li>• Email</li> </ul>				

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*Table A. Customer Service Best Fit for evaluating and selection KANA SEM are listed and described in this Table.*

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Overall, the key element of customer service best fit for KANA SEM is its support for process-oriented customer interactions. This is the first product that we've seen that has been designed to orchestrate customer service business processes or, as KANA calls them, Service Experience Flows. In addition, KANA SEM best fits the assisted-service processes of agents who work to deliver solutions to customers' problems using knowledge management technologies or, failing that, to create and manage the cases that represent those problems.

If you don't have the requirements for or the interest in process management, then nothing else about KANA SEM will matter to you. If you are interested in orchestrating your customer service processes, then note that KANA SEM is a new offering. Many of its capabilities are a bit immature and some key capabilities are absent.

Let's take a closer look at Environments and Customer Interaction Support, the subcriteria of Customer Service Best Fit that are most relevant to the assisted-service pain points.

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### *Environments*

KANA SEM embeds the IBM WebSphere SOA (Service Oriented Architecture) Foundation, which provides technologies for scalability, security, integration, and process control. In addition, KANA SEM is designed to be platform agnostic and to run on any operating system. Currently for operating system, it's certified to run on Linux, but KANA plans to certify other platforms based on market and customer demand.

In client support, KANA SEM supports the two leading browsers for internal users and agents. Customer client support is broader. Support for mobile devices would help.

For database support, Oracle and DB2 are certified today and support for SQL server is planned for a future release.

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### *Customer Interaction Support*

KANA SEM supports customer service processes. Process support is the defining, distinguishing, and differentiating characteristic of KANA SEM. Let's take a little closer look at what kind of customer service processes are best supported.

First, let's define customer service processes in the vocabulary of KANA SEM.

- ***Experience Flows (EFs)*** are conditional sequences of human and system steps that represent and that implement customer service processes. KANA SEM provides a set of Designers, visual tools that process designers/developers use to build EFs. EFs help customers, or agents working on behalf of customers, answer questions, diagnose and resolve problems, and, when these EFs cannot answer questions and/or resolve problems, create and manage cases.

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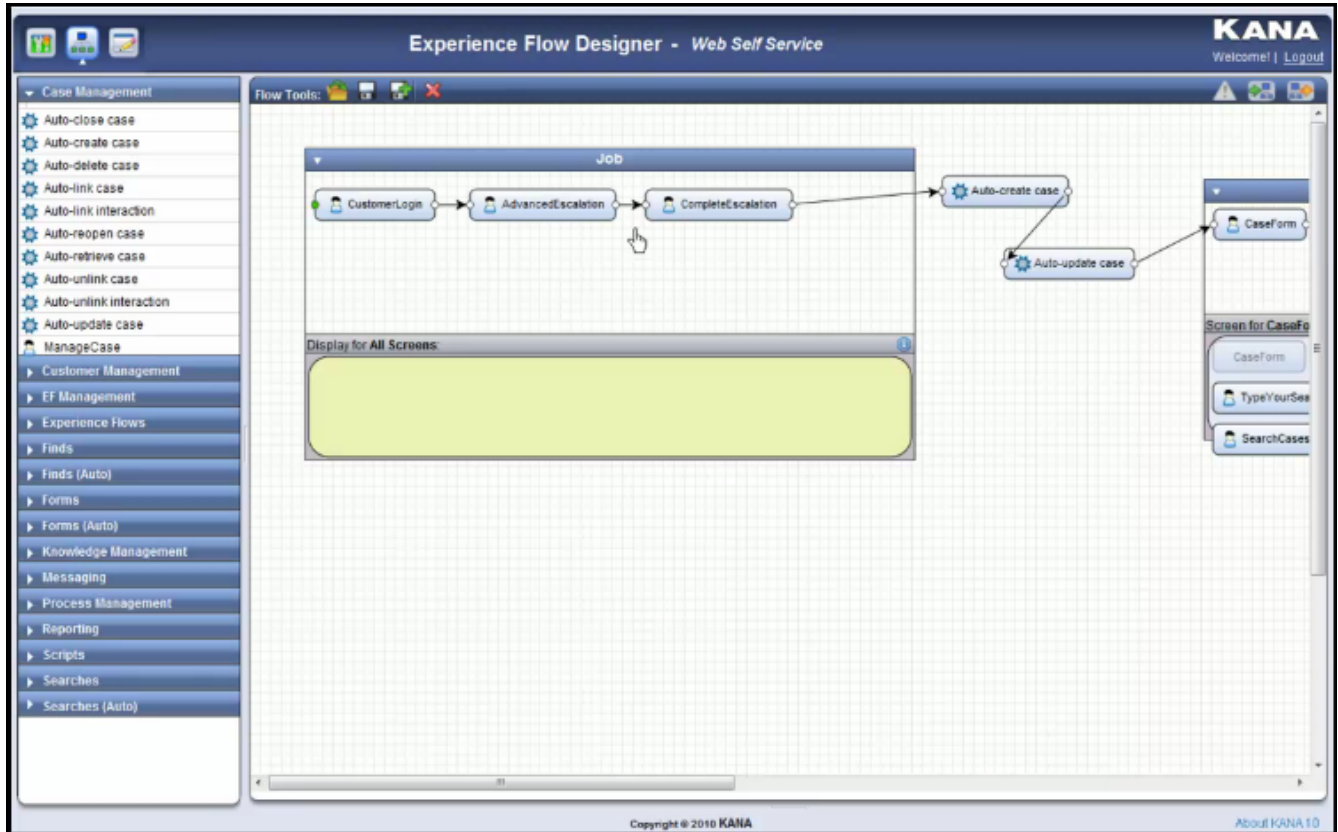
- An organization's portfolio of EFs is the customer *Service Experience* that it delivers.
- The Steps of EFs may be automated in, *Automatic Steps*, such as credit checks. Alternatively, the Steps of EFs may be performed manually by CSRs/agents or by customers. These steps are *Manual Steps or Human Steps*.
- *Manual Steps* are grouped within a *Job* in the EF. Jobs are *assigned* via business rules to one or more groups or individual users. An EF can have multiple jobs, each assigned to a different user group or individual user.
- Manual Steps are also *Required Steps*. A Required Step may have one or more *Supporting Steps* that provide additional information. In addition, a Supporting Step may be associated within one or more Required Steps.
- *Business Objects* are data and knowledge items that represent key EF resources, customers, cases, and FAQs, for example.
- Steps create, access, and manage the data and knowledge in *Business Objects*, access external resources, or control the sequence of EF processing.

KANA specializes EFs for customer service through predefined Steps and Business Objects that are packaged “out of the box (OOTB)” with KANA SEM. Predefined Steps and predefined Business Objects make it easier and faster to design Experience Flows. They best support assisted-service activities around case management on contact center and email channels. We expect that KANA will add many more predefined Steps and Business Objects in future release of SEM based on customer requirements and product marketing strategies.

**VISUAL TOOLS.** Process designers and developers use the Service Experience Modeler to build and manage EFs. They use the Experience Flow (EF) Designer to lay out the Steps of EFs using a familiar flow charting style that is quite visual. Illustration 1 presents a view of the EF Designer workspace including the canvas on which process designers lay out EF Steps.

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## Experience Flow Designer



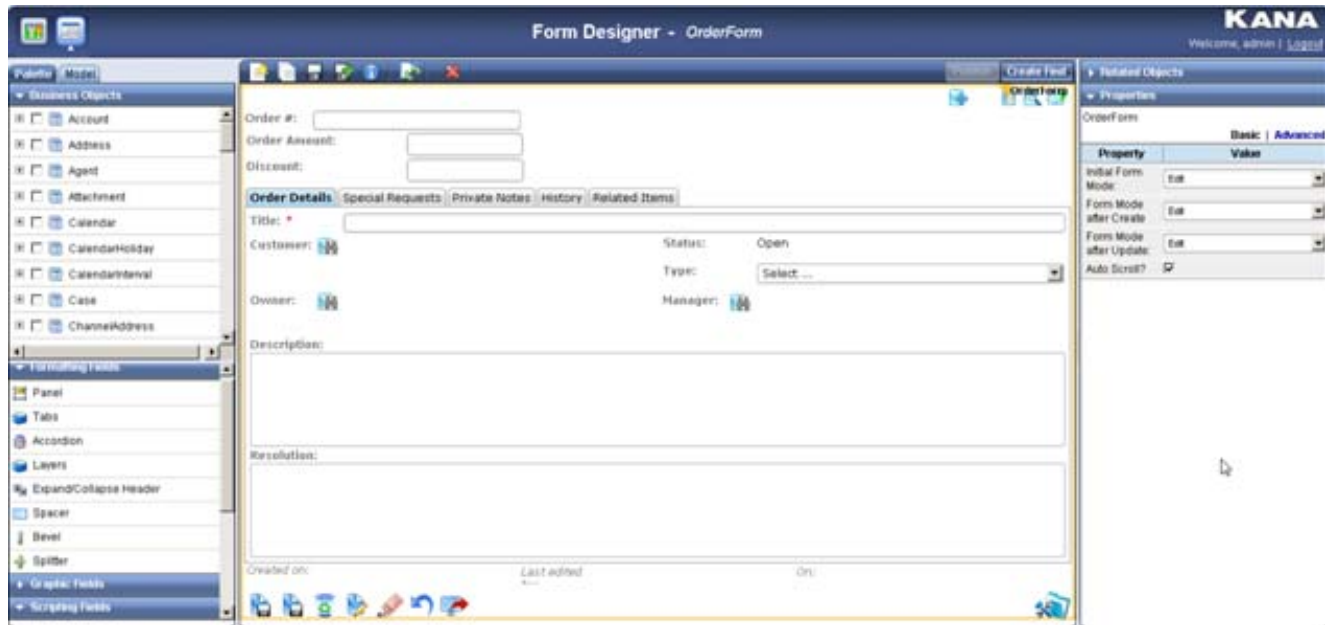
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Illustration 1. This illustration shows the workspace for the Experience Flow Designer.

Looking at Illustration 1, within the EF Designer, the predefined steps are organized into a set of palettes. Each palette is a template for creating and managing a type of steps, a palette for case management steps, a palette customer steps, and a palette for reporting steps, for example. Predefined business objects are data and content entities that support customer service processes. For example, KANA SEM packages case, account, customer, FAQ, and solution business objects.

The Service Experience Modeler also packages Step-specific Designers for Form, Find, Script, Search, and Report Steps. We show the workspace for the Form Designer in Illustration 2.

### Form Designer



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Illustration 2. This illustration shows the workspace for the Form Designer.

All of these tools are visually rich, powerful, and flexible. They'll be easy to understand and easy to use for staff with any business process design or business process management experience. Process designers place a step in an EF, add connectors, and then specify properties. The Designers are also general purpose toolsets. They feel like they could be used to orchestrate most any kind of business process.

## The Bottom Line

Customer service as a process or as a "Service Experience" is what characterizes, distinguishes, and differentiates KANA SEM. Service Experiences address the key pain points in assisted-service.

- Service Experiences automate customer service processes, taking the burden off agents to remember complex and conditional sequences of steps to perform to answer customers' questions and solve their problems.
- Built on the IBM SOA Foundation, Service Experiences integrate the applications, data, and content needed for answers and solutions, accessing all relevant external resources in the context of the process at the time that those resources are needed.

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- Service Experiences encapsulate and leverage an organization's knowledge of and its content for policies, procedures, products, and services, presenting this knowledge and content to agents in context and using it to drive the sequence of process steps of the work within them. As a result, Service Experiences can reduce the scope and scale of agent training and can quickly adapt processes for policy and procedure changes and for new and modified products.
- Every agent uses the same Service Experiences. Every agent becomes your best agent.

## ABOUT THE AUTHOR



**[MITCHELL I. KRAMER](#)** is a Senior Vice President and Senior Consultant at the Patricia Seybold Group. Kramer currently focuses on customer relationship management technology, architecture, and analytic applications as well as the computing infrastructure and information technologies that support this customer-centric domain. Kramer applies his experience and expertise to help customers evaluate, compare, and select CRM products and develop approaches toward successful implementation. Product vendors continue to leverage Kramer's skills and insights to develop product requirements, to better understand the competitive environment, and to assist in planning and delivering marketing programs.

Kramer draws on his extensive primary and secondary market research in the architecture, design, evaluation, and selection of enterprise-wide distributed computing infrastructures. In consulting engagements, Kramer often uses the technology frameworks he's developed with corporate IT organizations to help them with architecture and product selection decisions. He frequently works with companies to help them determine product requirements, market and product positioning, competitive analysis, and customer satisfaction. Kramer has successfully managed company launches, product introductions, and business and product repositioning. He has also developed and documented business plans for raising capital and for mergers and acquisitions.



## Patricia Seybold Group

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If you're a visionary customer-focused executive, the [Patricia Seybold Group](#) should be your first choice for ongoing strategic advice, business and technology guidance, customer experience best practices, and help with customer-centric initiatives.

Founded in 1978 and based in Boston, we provide consulting, research and advisory services, peer groups, and interactive workshops. We help clients to design and continuously improve their customer-focused business strategies and processes using our proven consulting methodology, [Customer Scenario<sup>®</sup> Design](#).

The CEO and founder, Patricia Seybold, is the *New York Times* best-selling author of *Customers.com* and *The Customer Revolution*. Patty's latest book, *Outside Innovation*, is [now available](#).

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