Intro

If you'd like to know more about improving customer agent up-sell revenue, you're in the right place. This is a short demonstration of a typical OpenSpan solution to the problem, and is set in a contact or call center.

Demo Set 1

First, let's set the stage. In this demo, a customer service representative will use normal line-of-business applications, Softphone CTI and Clarify CRM, to answer customer calls and look up an account.

Demo Set 2

That process starts a series of OpenSpan automations that trigger an outside logic engine and database, where a custom offer is crafted and sent back to the agent's desktop in a new pop-up window. The agent reads the offer script to the customer and marks it as accepted or declined in that some pop-up. Other OpenSpan automations then process and complete the offer.

A

This hands-on portion shows how OpenSpan can help incorporate an up-sell opportunity into your existing application environment.

B

As an agent answers a call from the CTI Softphone application, OpenSpan invokes an automation, driving the initial account inquiry transaction within the Windows CRM application. The automation will extract information from CTI Softphone, enter it into the Windows-based CRM application, then auto-navigate to the details screen.

C

Based on pre-defined criteria, OpenSpan determines whether the customer is eligible for a current promotional up-sell product.

D

OpenSpan notifies the agent immediately, by displaying a pop-up window containing the offer and the associated script for the offer.

E

In our first example, there are no offers available for the customer.

F

As the agent answers the next call, OpenSpan determines that there is an offer available for the customer.

G

The agent reviews the information in the up-sell window, and reads the script to the customer regarding the offer.

H

Once the customer has responded, the agent can click either the Accepted or Declined option and complete the up-sell process.

I

As the agent answers the next call, OpenSpan determines that there is an offer available for the next customer.

J

Again, the offer and script details are easily provided in a convenient pop-up window.

K

The agent no longer has to navigate and reference other internal marketing applications or thumb through hard copy materials to look up offers, which increase the Average Handling Time of the call itself.

L

Or in some cases, the user may not even attempt to look up possible up-sell opportunities.

M

As the agent reads the script to the customer, and the customer accepts, in this scenario the offer automatically generates an email to the customer containing specific details on how to use the offer.

N

During this time, OpenSpan extracts information from the customer record, the offer application, or even database, and creates and sends the email to the customer automatically.

O

As you can see here, if I open my email application, an email has been generated with specific details for the account, as well as for the offer.

P

Lastly, I would like to show you a messaging queue that has captured all of the agent's desktop events. OpenSpan can capture specific events that can be logged to any database, local file, or posted to a middleware messaging queue, as you see here.

Q

Details such as the accounts touched, whether up-sell or cross-sell offers have been accepted or declined, are just a few examples of the information that OpenSpan can capture.

R

This information can be used in a variety of different ways, such as auditing purposes, identifying process compliance, or provide analytical statistics for your workforce management tools, or even as a marketing tool to determine what offers are successful within your customer base.

S

This concludes our demonstration of how OpenSpan can help YOUR organization realize more revenue from agent up-sell improvements. For more information, including more demos, case studies, white papers, and other information, please visit the OpenSpan Web site at OpenSpan.com. Thanks very much for your time today.