



Improving Up-Sell Revenues with OpenSpan

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Improving Up-Sell Revenues with OpenSpan

CUSTOMER-FACING AGENTS BOOST SALES, HELP PRODUCE QUICK ROI

This paper describes challenges that organizations commonly face in improving agent up-sell performance, which can be addressed very simply and rapidly with the OpenSpan Platform.

OpenSpan is a cost-effective integration technology that generates rapid ROI for its customers. It helps companies leverage existing applications to improve workforce productivity. OpenSpan is deployed to over 100,000 desktops in Global 2000 enterprises, with more than 1,000 new desktop deployments every week.

Additional information on the OpenSpan Platform is summarized later in this paper; case studies, demos, Webinars, downloadable papers, and more are available on the OpenSpan Web site at www.OpenSpan.com.

EXPANDING SALES OPPORTUNITIES WITH EACH CUSTOMER CONTACT

In a competitive and changing marketplace, businesses want to derive as much income as possible from each customer contact or transaction. OpenSpan's solutions have helped optimize customer service for first-order priorities like quality and customer retention, and have also boosted up-and cross-sell performance for customer-facing employees in both contact centers and point-of-service positions with:

- ⌘ High value customer alerts
- ⌘ Customized up-sell offers
- ⌘ Assistance closing and executing the offer
- ⌘ Reporting and follow-up

ELEMENTS FOR SUCCESS

Up-sell improvements depend on a number of preconditions at the enterprise level, such as having adequate data to determine customer profiles and appropriate offer categories, and then crafting the offers themselves. But at the agent level, experience shows that integrating and improving agent up-sell performance can be improved by addressing several key challenges.

- ⌘ Improving agent focus
- ⌘ Recognizing qualified customers
- ⌘ Getting the offer to the agent
- ⌘ Monitoring and reporting
- ⌘ Order follow-up

The next sections delve deeper into these points, through the lens of a number of different OpenSpan deployments.

IMPROVING CUSTOMER FOCUS

Challenge: **Cumbersome agent application mixes, tiresome manual workarounds**

Customer service representatives (particularly in contact centers) typically rely on as many as 8 – 10 (or more) disparate legacy line-of-business (LOB) applications to perform daily tasks. Processing a typical customer transaction may involve dozens of manual steps using all available applications. This adds burdens and stress on the agent, which impacts job performance and detracts from sales productivity.

Solution: **Automate manual workflows**

Organizations use OpenSpan to first automate agents' application login procedures and consolidate customer account and administration processes. A next step is to consolidate and automate existing up-sell screens, and automatically synchronize customer data across multiple applications.

Results

In one global banking corporation, CSRs were able to complete initial customer service tasks and access up-sell screens 58% faster. This basic productivity improvement resulted in a steady increase of offers tendered and accepted. Customer focus is mentioned first in this white paper not only because of its importance to up-selling, but also because it's a concurrent benefit of almost any OpenSpan desktop implementation and boosts most quantitative and qualitative customer satisfaction metrics.

RECOGNIZING QUALIFIED CUSTOMERS

Challenge: **Identifying high value customers**

Customer service organizations typically already have transaction data on customers, and many have logic in place to rank customers by profiles, segments, or key data points such as account balance. Agents should be aware – from the time they answer a call, or in person at the point of service, how the customer ranks by tier. This significantly improves the approach phase of an up-sell offer and chances of later closing.

Solution: **High value customer alerts**

Create an automation that alerts a CSR to a high value customer. This is commonly achieved in the following manner: when a CSR enters a customer number into an application, the OpenSpan automation passes that data into a back-office database and then passes back an alert to the CSR whenever the customer being engaged is a high value client.

Results

One retail bank's marketing and IT departments jointly created a special customer database and a logic engine to match each customer account number with a summary of the holder's past activity to dynamically make custom up-sell recommendations each time a customer came in for service. OpenSpan-enabled Web services on the tellers' desktops triggered the database in real time. Delivery of the resulting offer is described in the next section.

GETTING THE OFFER TO THE AGENT

Challenge: **Delivering an appropriate offer to the agent, in time**

Once the customer is identified, the agent quickly needs an offer to present. If offer information is spread around among different desktop systems, or even in sets of printed references, it can be very difficult to access the correct information in enough time to present it.

Solution: **Automate up-sell offer look-up**

OpenSpan can create an automation to handle the look-up process, typically using a service or messaging request to a back office system, then deliver the offer to the CSR via an extension (such as a pop-up dialog box) in or alongside the main customer service application.

Results

When OpenSpan helped create just such a project for a retail banking corporation, up-sell statistics improved immediately after the initial implementation cycle of 3 weeks; even drive-through customers sometimes parked and came into branches to take advantage of offers. There was no adverse personnel impact; in fact, tellers found the system to be easy to use, and were incentivized based on offers accepted, which reinforced success.

MONITORING AND REPORTING

Challenge: **Management visibility into agent activity**

Managers and planners need consolidated data for analysis of sales statistics – gross and net, sorted by offer, customer, location, or other criteria. Marketing organizations also want real-time feedback on the success or failure of field-level programs.

Solution: **Instant feedback on program success**

OpenSpan can assist in real-time visibility and instantly report events at a very granular level. This reporting works in concert with other automations to force CSRs to confirm that an offer was presented, and whether it was accepted or not. Separate automations can route the data to virtually any database or back-office application.

Results

OpenSpan reporting and automations allow for quick modifications to sales programs based on real-world customer feedback. Organizations collect agent sales performance data in real time, so that management can “see” into processes happening on agent desktops and understand immediately what the impact is on field-level sales programs.

ORDER FOLLOW-UP

Challenge: **Finalizing sales processes, making additional offers**

After offer acceptance, an agent might need to immediately generate a confirmation communication, involving several applications and copy-and-pasting several fields' worth of data. Further, completing some types of sales, such as financial products, can involve complex middle – and back – office interactions by several employees, with multiple applications.

Solution: **Integrate disparate applications, automate cumbersome manual processes**

OpenSpan's automation capabilities let you quickly and easily generate a receipt or other sales response, from Outlook or other mail applications, confirming the sale and automatically copying forward and sending qualifying information such as discount codes or further contact information.

In addition, OpenSpan's integration, automation, and service extensions can assist in alternate or follow-on sales offers during live customer interaction with an agent or afterwards.

Results

Organizations implementing OpenSpan report significant subsequent up-sell closes if implemented. And as an example of sales process improvements, the back office of a major international investment bank used OpenSpan to automate final customer trade processes and cut time from 50 hours to 1.5 hours (roughly 97%), requiring less manual intervention and reducing data errors almost to zero.

THE OPENSAN PLATFORM

The OpenSpan Platform is an ideal enabling technology for up-sell programs. It provides a rapid development and deployment environment that allows you to maximize the business value of your existing assets while also providing a means to quickly further strategic architectural goals. This is accomplished via the following:

Rapid integration of virtually any application

OpenSpan features a unique technology approach that leverages the communications between software applications and the underlying Windows operating system. With OpenSpan, you can integrate virtually any application including:

- Windows desktop applications
- Host applications
- Web applications including Web 2.0-style applications
- Java applets and applications
- Software-as-a-Service or third party applications where you might not have access to source code
- “Closed” or custom-built applications with no available API or connector
- Web services (SOAP, REST, HTTPS, etc.)
- Virtualized, including Citrix-streamed applications
- Any application that ultimately gets delivered to a user using a Windows operating system

Full or partial automation of business process workflows

Via a drag-and-drop visual design tool, OpenSpan provides a rapid design environment for building workflow automations within an application or across a series of applications. Once a manual workflow has been automated, it can also be exposed as a Web service or via a messaging interface.

Extend existing applications by adding new business logic

Instead of upgrading or replacing applications, OpenSpan provides the unique ability to add new business logic to an existing application without requiring access to or modification of source code.

Optimize user interfaces

OpenSpan provides a highly flexible environment for optimizing user interfaces ranging from building new composite applications or application bars to integrating workflow automations into existing web applications or portals, to modifying user interfaces to existing applications if you prefer to minimize impact on business users.

CONCLUSION

This paper highlights some of the challenges that customer service and retail organizations face in improving up-sell performance of customer-facing agents. It is by no means a comprehensive analysis of every potential problem and solution; rather, it presents challenges, solutions, and results distilled from OpenSpan's deployments that have helped enterprises significantly boost up- and cross-sell results as a component of customer interactions.

For further information on OpenSpan's Industry and technical solutions, please visit the Website at **www.OpenSpan.com**. Download more white papers, case studies, see demos of how OpenSpan can deliver immediate gains and quick ROI.



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