Xero Chooses EpiAnalytics® Contact Center Analytics and Automation Solution to Improve Customer Experience and Eliminate Manual Routing

Learn how one global organization is using EpiAnalytics® SmartCase™ solution to automate its contact center’s email triage to reduce manual case reading and enhance routing with precise analytics and real-time automation, ensuring that its agents work smarter not harder.

Company Overview:
Founded in 2006, Xero Limited, NZE: XRO is a New Zealand-based software company that develops cloud-based accounting software used by small and medium-sized businesses. The company provides business owners and their advisors with real-time visibility of their financial position and performance in a way that’s simple, smart and secure. Xero has over one million subscribers in more than 180 countries and was ranked No. 1 by Forbes as the World’s Most Innovative Growth Company in both 2014 and 2015.

The Situation
Based on the principle that small businesses are highly sensitive to shifts in their balance sheet and cash flow, Xero is committed to offering subscribers the ability to monitor financial performance in real-time and provides them with unlimited, round-the-clock customer support.

In 2016, the company implemented the Salesforce.com Service Cloud, which Xero relied on to create assignment rules for incoming customer service inquiries. Mitchell Cowan, lead business analyst, and Mark Clayton, general manager, automation, look after technology needs for Xero’s customer experience team, including the Salesforce Service Cloud.

“One of the benefits of using Service Cloud is its out-of-the-box functionality,” says Cowan. “It allowed us the ability to create assignment rules so that we could route incoming customer service inquiries to the appropriate agent queue depending on their support need.”

This functionality was sufficient in terms of identifying key words to use to assign and route cases to queues, but required considerable time to manually analyze which key words should trigger which assignment rules. After ending up with nearly ninety assignment rules across thirty queues, Cowan/Xero quickly realized there was room for improvement. In many instances, cases were getting assigned to an incorrect agent queue or getting routed to a general queue, which required additional manual review and cost.

Xero was determined to find a solution that would help them get more cases to the right people at the right time.

CALL CENTER

“Analytics is of utmost importance to companies as they move towards providing omnichannel customer care . . . [n]ew analytics offerings focus on customer journey analytics to provide insights into the customer journey and sentiment, to improve the customer experience, fuel proactive to customer outreach, and revenue generating opportunities.”

- Frost & Sullivan’s Digital Transformation, Sept. 2017

“Operationally, we’ve become a lot smarter by being more proactive with how we use our people day-to-day because we’ve been able to free up more resources and place them on activities that are more focused on improving the customer experience.”

- Mitchell Cowan, lead business analyst, Xero
Xero took advantage of the SmartCase™ solution to replace and augment manual agent efforts, resulting in:

- Increased contact center efficiencies by analyzing every support request in real-time increasing routing speed and accuracy.
- Better operational business intelligence through operational reports on key metrics, trends and sentiment analysis.
- Higher utilization of support resources using customer complaints and CRM data to increase efficiencies, cut costs and reduce call volumes.
- Enhanced risk identification, ensuring important critical issues don't fall through the cracks.

The Challenge

“Prior to implementing Service Cloud, we had a number of key members on our customer experience team who were responsible for ensuring that our queues were cleared of cases that were incorrectly assigned,” says Cowan. “This involved a lot of cost, time and resources to move these cases. When we moved from our previous case management solution to Service Cloud, our operation for assigning cases to a queue and then to an agent was all done manually.”

Even with the help of Service Cloud’s native assignment rules, Xero’s customer experience team still required considerable resources to monitor their queues 24/7 due to the inaccurate results of their rules.

Xero was intent on finding a solution to classify incoming customer service emails more effectively and using automation to resolve more cases so that their service representatives could spend less time reading and routing cases and more time improving the customer experience.

The Solution

“We started out researching general keyword analysis tooling to try and help us build out the manual rules more effectively, because we were spending a lot of time manually reviewing case examples that weren’t correct,” says Cowan.

Cowan eventually turned to the Salesforce AppExchange and, with some additional guidance from a Salesforce success manager, learned about EpiAnalytics and its contact center business intelligence and process automation solution SmartCase. Using machine learning and natural language processing (NLP) technology, SmartCase learns from agents and applies existing routing logic to match support requests with the right skill-set and responds to customers automatically based on the content of their customer service request. SmartCase is available through the Salesforce AppExchange, enabling users to leverage all the native reports and dashboards and track ROI in real-time.

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Whether a customer has a problem or presents an opportunity, EpiAnalytics makes sure that the right corporate stakeholder quickly receives the right information.
The Result
With the help of EpiAnalytics' SmartCase solution, the team at Xero has been able to eliminate a lot of the manual routing processes associated with managing queues and as a result has streamlined its contact center operations by freeing up more resources. Now instead of spending time manually managing the queues, Xero’s agents can focus on customers and their service requests within the queues.

Cowan stated that: “Operationally, we’ve become a lot smarter by being more proactive with how we use our people day-to-day because we’ve been able to free up more resources and place them on activities that are more focused on improving the customer experience.”

Return on Investment
Calculating the return on investment is quick and easy. Here is a sample of what our clients have been able to achieve with SmartCase:

- Automated Deflection Rate: 75% of all inbound requests
- Overall Agent Productivity: 120% increase
- Customer Response Speed: 600% increase
- Time-in-Queue: 65% reduction
- Overall Support Productivity: 25% increase
- Customer Satisfaction: 20% increase
- Employee Satisfaction: 50% increase
- First Contact Resolution Rate: 10% increase
- SLA compliance: from 15% to nearly 100%

The ability to route cases to the appropriate agents more efficiently has allowed Xero to realize quantifiable benefits in a short amount of time. Within just the first month of going live with SmartCase, Xero reviewed its highest volume queues and discovered it had increased agent productivity by 7.6 days of agent time per week (182.4 hours) by not having to reassign cases that had been incorrectly routed to the wrong queue. In addition, they’ve improved their ability to meet certain service level agreements, which they attribute in part to being able to assign cases to the correct queues the first time. Xero has also begun to leverage SmartCase’s automated response features to continue making improvements to the customer experience by increasing response speed and reducing the time cases are in the queue.

“We started out using SmartCase to help us classify our queues, but over the last couple of months we’ve started using the solution to help us become more efficient by building out automated responses back to customers,” says Cowan. “We’ve been able to identify particular questions that can be automatically answered without requiring any specialist agent interaction. And because the solution is so scalable, we now have the ability to train additional models to use auto responses and completely automate the work flow for particular cases.”

With the help of EpiAnalytics’ SmartCase solution, Xero has improved its customer experience team’s operations by getting cases to the right agent at the right times, while automating responses. It now boasts a more efficient customer service center, enabling the company to better meet the needs of their more than one million subscribers around the globe, while attracting new subscribers to the service.