

Customer engagement, Digital & messaging

The ROI of digital CX, part 3: How to build a business case for digital self-service

Tony Lorentzen | General Manager & Senior Vice President, Intelligent Engagement

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In the third of our three-part series on the ROI of digital CX, we look at how to build a business case for your intelligent virtual assistant, and the questions you should be asking potential vendors as you search for the perfect match.

We kicked off our *ROI of digital CX* series by looking at just how crucial digital self-service is today, and how an intelligent virtual assistant (VA) can help you create effortless, personalized experiences for your customers. We also explored the real business benefits a VA can create for your brand—including boosted sales, stronger customer experiences, greater agent efficiency, and lower operational costs.

But now that you've seen what an intelligent VA can offer, it's time to build your business case for your colleagues and other stakeholders. And find the right vendor to make it a reality.

How to build the business case for your VA

When you're working at the heart of your brand's customer engagement day-in day-out, the gaps and points of friction in your customer journeys are easy to spot. But other stakeholders across your business may not have the same awareness as you do.

That can make building the business case for new investments like a VA incredibly difficult. Your colleagues likely know how important digital is today but might struggle to see the tangible value a carefully designed and continuously optimized intelligent VA can bring to your brand. That's why it's

important to communicate the challenges you're trying to solve—for your customer service teams and your customers—and showcase how a VA will help you solve them.

When Forrester spoke to customer engagement leaders for its most recent *Total Economic Impact*™ study, these were the two key challenges that helped cement the business case for a VA.

#1 Differentiating customer service experiences in a crowded market

Digital experiences alone are no longer a differentiator, regardless of the industry you're operating in. Instead, they're expected as a bare minimum by many customers today. And to stand out, you need to be offering something truly special.

The interviewees in the Forrester study recognized this challenge, looking to deliver “personalized communications that address specific questions and don't feel like canned, robotic responses”. They also felt “a true 24/7 customer service program was necessary to keep their customers happy and engaged”.

Without an intelligent virtual assistant, achieving both these qualities is a near-impossible task. If you opt for a basic chatbot, the personal and human-like nature of your customer service will inevitably suffer. And if you choose completely agent-handled service, creating 24/7 availability will quickly ramp up your costs.

#2 Maximizing the productivity of customer service agents

Customer service agents are a hugely valuable resource in the contact center. They deliver personalized, empathetic service that can be difficult to replicate with technology. Plus, they help close sales and maintain strong customer relationships.

But there's a limit to the workload they can handle. Too often, the majority of agents' time is spent dealing with simple, repetitive customer queries. One interview from the Forrester report revealed a common inefficiency in how information is accessed by agents. The interviewee explained that the brand's agents regularly shared screenshots of conversations and saved chat scripts on their local hard drives—making it difficult for the customer service leaders to share, update, and standardize brand communication protocols.

When these brands started using intelligent VAs, they quickly solved both problems. Their VAs now handle common FAQs and repetitive queries effectively, freeing agents to serve more complex customer cases. And when engagements are transferred to a live agent, they're transferred with a full transcript of the conversation and context on the customer, making it easier for agents to deliver effective service.

Even better, when live agents resolve an escalated issue, they're actually teaching the VA how to resolve it next time. This continuous learning loop means that intelligent VAs get smarter over time, helping them handle more inquiries and reduce live agent call volumes even further.

Key questions to ask when choosing a vendor

Convincing the other stakeholders in your business will be much easier if you enter the pitch with an expert vendor by your side. But there's a lot to think about when picking an intelligent virtual assistant and vendor that's right for your brand—and a lot that can go wrong if you don't consider all the features you'll need to futureproof your digital CX journey.

In the Forrester study, some interviewees reported they struggled when trying to enhance their digital customer service with in-house tools. And many of those that tried implementing point solutions found their teams didn't have the resources or skills necessary to complete the deployments.

To maximize your chances of success, it's worth choosing an intelligent, enterprise-grade VA from a vendor that has the expertise needed to integrate it into your digital customer experiences. To help you navigate the market, here are some key questions you should be asking any potential VA technology partner:

Does your virtual assistant offer live chat escalation?

This is a simple but vital consideration. While an intelligent VA can handle many of your customer queries, there are some that will always be better handled by a live agent. That means it's critical your VA is able to seamlessly transfer customers conversations to an agent—in the same channel—while passing on the complete context of the engagement.

Does your virtual assistant continually learn?

You don't want a VA that will become outdated in a few years. Instead, it must be able to grow with your brand and continually learn from customer engagements. You'll need to find a VA with a continuous learning loop, and so it can understand more intents and avoid escalations to live agents—keeping costs low and CSAT high.

Can your virtual assistant help me create personalized, contextual experiences?

If you want to offer truly conversational, human-like experiences, your VA must be able use your customers' data to personalize interactions. It will need to easily integrate with your CRM tools to create a complete picture of your customers and their relationship with your brand.

Is your virtual assistant tailored to my industry?

A generic VA will quickly reach its limit on the number of cases it can solve for your customers. Instead, you need a virtual assistant that's pre-trained to understand customer intents and terminology commonly used in your industry. You also need to ensure your VA is set up to provide responses that are compliant with industry regulations.

Is your virtual assistant secure?

Finally, if you're expecting customers to share personal details with your VA, it's important you have the right security measures in place. Ideally, you'll want a vendor that can offer biometric authentication across every interaction—keeping customer information secure, without adding any friction.

Tags: [Digital self-service](#), [Intelligent virtual assistant](#), [Forrester TEI study](#), [The ROI of digital](#)



About Tony Lorentzen

Tony has more than 25 years of experience in the technology sector, spending the last 17 with Nuance where he is currently the SVP of Intelligent Engagement Solutions within the Enterprise Division. Before that he served as the leader of several teams at Nuance including Sales Engineering, Business Consulting, and Product Management. A proven leader in working with the cross-functional teams, Tony blends his in-depth knowledge of business management, technology and vertical domain expertise to bring Nuance's solutions to the Enterprise market, partnering with customers to ensure implementations drive true ROI. Prior to Nuance, Tony spent time at Lucent and Verizon where he led teams that applied the latest technologies to solve complex business issues for large enterprises. Tony received a B.S. from Villanova University and a MBA from Dowling College.



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