

CCW Vegas 2019 - Chatbox



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Phil Gordon, CEO and Laura Ashley, VP Marketing, Chatbox. CRMXchange had an engaging conversation with these two multi-talented leaders about the company's enterprise messaging platform which enables businesses to create and automate personalized, conversations across texting, chat, and social channels. Sheri also attended the evening poker clinic Phil conducted at the Mirage and found it enlightening even though she conceded that it won't make her a tournament player anytime soon.

With texting having become such an integral part of most people's daily life, why has it been an uphill battle to get more organizations to adopt omnichannel messaging to communicate with customers?

We think it comes down to three things: logistics, regulation and integration.

Logistics: Adopting a new communications channel means new technology, training, cost, integration, management, controls, permissions and security, to name a few. This can be a lot for organizations to wrap their heads around, convince decision makers of the ROI and then generate the momentum needed to change existing workflows.

Regulation: Brand to consumer texting is regulated in the US (and elsewhere) yet the technology behind it is still widely misunderstood. This has led to a lot of market (and legal) inconsistency in terms of acceptable use and compliant behavior. Policy makers and market participants struggle between not wanting texting to be intrusive, while still providing consumers the convenience they demand.

Integration: For an omnichannel strategy to make sense, your channels must be fully integrated with your various data sources so you can deliver a consistent brand experience in real-time. Integrating channels with CRMs, back-end solutions or other data silos can be tough. If you don't do it, you will frustrate your customers and you might have been better off never deploying the channel in the first place.

Please tell us about the benefits of the Chatbox platform?

We help businesses deliver amazing text message-based experiences to their customers for service, sales, and marketing. Some of the largest businesses in the world are utilizing the Chatbox platform for those purposes. We're helping those businesses communicate better using text messaging that today's customers demand.

Some call it texting while others refer to it as SMS messaging. Which do you prefer?

The terms are used interchangeably depending on the audience. We even sometimes revert and just call it messaging. We think of them all as the same.

CCW Vegas 2019 - Chatbox

For years at CCW, we've seen numerous messaging platforms, and it seems like a great idea, but we still don't see a lot of companies using them. What do you think is a hold up?

There are several obstacles that are holding back mainstream adoption. First, it's a complicated space to deliver outstanding customer experiences via text message. It requires a lot of work for companies to stitch these experiences together themselves. They need to worry about channel management and whether they operate on short code, long code, 800 numbers or more. They have to be concerned about automation. Many big businesses operate at scale and unless you have some sort of automation in play, it's impossible to reply to all the inbound traffic. Until recently, this has been a difficult challenge. The advent of Amazon Lex and Google Dialogflow and other natural language processing engines have made that problem more tractable. The third problem that is holding companies back from deploying messaging is that while a text message can provide intent, it can also set off a chain of complex communications. Think about a simple item return. Suddenly a company is faced with having to text message back and forth six or seven times. Which item are you trying to return and what address should we send the box etc.? It can become very problematic. I think integration with incumbent systems has been an issue, all those things combined have made it a little bit slower than potential customers expect it to be. We've been trying to address those core problems and more with the Chatbox platform.

What level person would be pulling this whole program together?

Some of our biggest customers have appointed a Chatbox administrator. Think about it like a Salesforce administrator. These administrators are responsible for monitoring inbound traffic, provisioning agents in the system, setting up the automation, tracking the analytics and more. We've had enterprise grade customers come to us and in under a week we have them fully up and operational with integration to their Salesforce system. It can be a very quick and efficient process, but it can also take longer depending on the level of integration that a business need with its backend system.

What makes your solution different?

We're the only platform on the market that seamlessly integrates the six key technologies that are required to operate these experiences at scale. The seamless orchestration of these [six technologies](#) is what makes Chatbox a platform versus just a point solution. First, we offer omnichannel capabilities, so that brands can communicate consistently across social messaging apps, text, and live chat options. Within each of those channel categories our platform can effortlessly manage multiple channels - a company may have hundreds of agents, each with varying permissions, all texting with customers via hundreds of separate numbers that may even be sourced from multiple SMS providers. Second, we allow companies to leverage automation for scale - think chatbots and natural language processing - so agents can focus their "human touch" on the most important customer interactions while letting bots handle the repetitive calls. Third, our Instant Apps provide an app-like experience to exchange rich, structured data on demand, all without a cumbersome download and install process. Fourth, our APIs integrate with backend and CRM systems to continually personalize the customer experience and ensure there is one source of truth. Rounding out the platform, our agent tools help service and call center reps manage their communications and permissions, while our analytics provide a configurable view of metrics across the entire platform.

CCW Vegas 2019 - Chatbox

We have robust channel management that enables us to deploy to any channel, to any SMS phone number, in a scalable way. For instance, one of our big customers has 900 phone numbers that we manage on their behalf. We help with automation as well, with keywords or natural language processing, and do it in a way that's straightforward, scalable, trackable, and moves the ball forward. A lot of companies get hung up right now. They think that AI is some magic bullet that's going to solve all their problems and that no one's ever going to need an escalation to a human. That's simply not the case. The AI is not good enough yet, but it's crucial to get some form of automation going and our platform makes it easy to automate the things that can be automated and hand off to humans when needed. As we alluded to earlier, we can handle the collection of structured data inside of those conversations. In our platform you can build checklists, wizards, forms, collect e-signatures, and deliver rich media content all within the context of a conversation. These experiences can be built without an engineer involved. When business requirements change on the fly, it's just drag and drop.

One of the largest travel agencies in the United States is our customer. There's a huge integration with their flight information service. When you book a trip with them, you'll receive text messages with updates regarding your trip. Now you no longer have to call customer service to find out if your flight is late or the gate has changed. We can also process the data that's required to change that flight right within the text message conversation.

Why is it critical to maintain a consistent brand identity and customer experience across all channels?

Many companies have multiple ways of communicating with their customers, using a variety of channels which are often run by different departments. This can lead to a disjointed experience for the customer. If a customer has a bad experience, they don't blame the team (or technology) that handled the communication, they blame the *brand*. Customers expect brands to have their data on hand (irrespective of channel) and they don't want to have to repeat themselves or be transferred multiple times to solve a simple request.

Consumers do not have the time nor the inclination to figure out how to best communicate with brands. They want brands to meet them where they are, on demand. Consumers effortlessly switch channels as they go about their daily lives (from email to text-to-chat to voice to social) and they expect brands to be able to do so as well. If your customer experience is inconsistent across channels you degrade the customer experience and risk diluting your brand. The [stats](#) around the benefits of a consistent and integrated multichannel strategy are staggering. If you believe the adage that time is your most valuable resource, then a brand that doesn't respect the value of their customers' time does so at its own peril.

If there needs to be an escalation, does the agent receive the information from the texts?

Yeah, absolutely, and not just the text message transcript, it's also all the data that was collected inside of those app-like experiences that are built inside the platform. The agent actually has a real-time view of every bit of data that has been kept, that has been sent to and from that customer right inside the conversation. It's an astounding experience both for the customer and for the service agent to have all of that data right there. As an agent, I have full visibility into every button you clicked, every input field that you modified and all that data lives right inside your customer record.

CCW Vegas 2019 - Chatbox

What if a customer needs to make a return and requires a return label? If they're texting through some sort of robotic processing automation can the workflow create a label and send it to their mobile phone without any human intervention?

The key thing is for businesses to automate where it makes sense and escalate where it makes sense. There will always be a requirement for human-based interaction for the most complicated of cases, but that shouldn't be an insoluble problem. Look for opportunities to automate the most common use cases, the simplest use cases so that your agents can concentrate on the issues that require both a brain to solve and the ability to express empathy.

What do you think the average consumer is looking for in text interactions?

Convenience. Texting is the only thing that every single mobile phone on the planet does and does well. If you look at the average US adult, they spend many hours a week text messaging. Since we've all just become accustomed to text first for our personal interactions, it should be the same way for businesses that care about creating meaningful conversations with their customers. Three years ago, only 4% of calls to mobile phones were spam. Last year it was 40% and this year it's going to go over 50%. Fifty percent of phone calls to a mobile phone today are spam. Texting first should be one of the ways that you contact your customer: "Hi, this is Phil from Chatbox, I need to speak with you about your account. What might be a good time for a call?" That's a respectful way to interact with your customers, by contacting them in the fashion they are already interacting with other individuals in their sphere of influence.

We started experimenting with texting for our webinars. When somebody registers, we ask for permission to text and we promise we will discard their numbers. For those who agree, 75% show up.

That's yet another benefit of SMS, nearly every text message is read within three minutes of delivery. The most recent stats show 95% of text messages are read within three minutes of delivery. Compare that to email of which only 20% are ever read. Our big travel customer reports that approximately 90% of their travelers prefer getting notifications via text and changing their flight without having to call customer service or having to download and install another app.

Do you have any final thoughts for our audience that you would like to discuss?

One thing that's important to understand is that the text messaging world can still be complicated. Consumers that want to text message can sometimes be a little wary about being scammed or phished. There's a relatively new term called smishing. It is a combination of SMS and phishing. Being able to authenticate that you are who you say you are is a really important piece of the puzzle that we've just recently patented and solved.

We have authenticated SMS. If you use the keyword "ID" you'll get an automated reply that says, "Yes, this number is owned by [company name]. Visit our website and enter this code." If you follow the instructions, you'll receive a confirmation with the date and time of contact. Now you have confirmed this was an authenticated conversation and are assured that you're talking to a legitimate company. We believe the space growing like crazy and ultimately you will see just about every major consumer brand in the country light up text messaging for sales and support.

