An Interview with Dan Michaeli, CEO and Steve Kaish, SVP, Glia

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Presented By: CrmXchange

CrmXchange Managing Partner Sheri Greenhaus has conducted a series of interviews with CX/contact center solution providers who were scheduled to exhibit at the cancelled Enterprise Connect conference. Here are excerpts from her conversation with Dan Michaeli, CEO at Glia who was also one of the founders of the company and Steve Kaish, SVP Product Marketing and Technology Partners

DM: At Glia, our mission is to reinvent how businesses support their customers online. We're currently engaged in doing that across a multitude of enterprise companies with multiple use cases in several key spaces. We are involved in sales or service, with more than 100 customers and counting. Let me elaborate on where this concept came from. It starts with the reality that customer preferences have significantly evolved over the last decade and traditional telephony services aren't really doing enough to satisfy their needs today.

Digital Customer Service

If you look at customer preferences, they are continuing to move to on-screen activities. It has shifted from being in a store or branch office to over the phone and now to online, whether on a portal, a website or on an app. Businesses want to move to these online experiences because they represent a meaningful cost saving. The problem is most customer service is still being done on the phone. What's fascinating about this approach is that according to our data research, 80% of the calls that are being made are mainly on-screen or near-screen calls. This means that the consumer is calling the contact center on the phone, but are on their computers or mobile device and are near enough to a screen where they could be guided through a digital experience instead of having their issue handled blindly over the phone.

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This is where the disconnect exists, with many businesses having the predilection to still do customer service over the phone as opposed to moving to onscreen. That is what led to the creation of this category of Digital Customer Service, which has become increasingly important. We consider ourselves a pioneer and have been advocating it for years. Instead of being rooted in the phone system, in this model the customer service experience is rooted in the digital environment and takes place in digital self-service journeys.

We're enriching customer touch points through collaboration with communication choices and with personalization. And that is what DCS is at its core. There are two ways that this is being done. The first is a fragmented approach that businesses have been taking for the past few years. They're trying to solve the needs of customers reaching out for self-serve options but are only providing disparate point solutions. They put messaging in place, and chat and perhaps even offer co-browsing or screen sharing in a disjointed fashion where everything is often siloed. The second approach is doing it seamlessly, where customers can start on any of these channels and be guided along the way as they navigate between touch points. That is what Glia specializes in.

Even if companies already have part of the technology solutions in place, we go beyond our software platform with a comprehensive success management practice. We have a four-step process that enables clients to migrate from a phone-first approach with fragmented point solutions to a holistic methodology. They can phase out the need for disjointed touch points and ultimately adapt Glia. This includes key integrations with core systems such as the contact center. We've created functionality that allows for such migration which are instrumental in getting it to work. This can be done progressively, eliminating the need to rip and replace everything.

You can see the demonstration at Glia.com/demo. When someone goes through it, they can see how the digital experience in that self-serve mode and being contextualized in what is being seen by the customer. Instead of having to guess, the company using Glia has live observation capability that enables it to get on the same page right from the outset of the conversation, when an interaction is started, it normally shows a little chat icon and queue, but for demonstration purposes, you'll see different agents displayed. When you click on a specific agent, you'll see a series of communications options on different channels that can be phased in.

The customer can start on any channel, providing the breadth of touchpoints at the point of need within the digital journey. If one starts with chat, the agent can then decide whether to accept. The agent can then offer additional options, such as co-browsing which the customer can choose to accept. This allows the agent to come right in on screen and seamlessly navigate. We can then offer such things as forms which can be filled out with the agent's assistance. The co-browsing takes place only on the specific page that the agent and customer are working on together. The agent can't see anything outside the browser, providing an ultra-secure interaction. Everything is restricted specifically to the exact experience. Any sensitive information that is typed onto a form cannot be seen by the agent. That is how we make it more secure than a screen sharing session. Since we have SoC 2 compliance, we can work with financial institutions that need to be totally secure with this functionality as well as with insurance companies. In fact, most of our client base is comprised of banks, credit unions and insurance firms.

If a customer wants to take a conversation to the next level or feel they need more high-touch service, in Glia's we offer options such as starting audio or video communications within that interaction. The customer can see the agent on camera on their phones and make seamless transitions between channels. The agent can go back to co-browsing. Video can be accepted or declined by the customer, left off by the agent, or chosen as not to be configured as an option by the company.

Within this environment, it is important to get customers up and running quickly. We were able get one of our new clients up and running within 24 hours. It's simple to get basic implementation. What takes time is designing custom call flows for more involved applications. It takes some thinking about how the company wants to configure the system, which is fast and extremely lightweight.

With the surging demand over the previous weeks, our team has been back to back to back with requests to facilitate the transition. We've migrated hundreds of agents to work-at-home with very low effort. We've also transitioned entire contact center using on-prem solutions to Glia. This includes both clients that have already been using us as well as those who have not. Many of our clients found that they didn't even have to call us in this busy time, just have the agents take their headsets home and plug in their computer. We had other clients using us for the digital catch channels but not for voice that had older phone systems that were incapable of accommodating the needs of remote workers. We were able to convert them very quickly to support phones. The crisis has led to an expansion in the number of users of digital channels. Companies are experiencing a surge in demand as well as encountering users who've have no experience with online tools. Such customers are accustomed to going into say, a credit union branch and now they are trying to figure out how to transfer funds online.

Agents who are working at home are using their mobile phones more often than home phones, since they don't want to tie up their home phones all day. It depends on whether they have sufficient bandwidth for internet stability. If they do, they can use the headsets. Managers can look up reporting in one location.

Best-In-Show

We were honored to be named a finalist for the "Best-in-Show" award at Enterprise Connect for our conversational compliance AI. Our AI management programs provides a chassis and engine model where a company can take different types of bots and deploy them right through Glia. The bots are the engine, but we provide the chassis around it. This allows the business to take those bots and deploy them across different channels. For example, for social or chat, Glia enables our customers to create teams of bots to route to other bots to transfer with each other. This functionality is part of our AI management solution and one of its key components is operator assistance. By allowing the bots to be pointed toward the agents, the business can for example, have a fraud prevention bot or a compliance bot or a training bot. These bots are constantly monitoring a conversation and providing suggestions to the agents. If a customer types "I have a credit card broad alert," the compliance advisor provides the suggestion that it's been vetted already and you'll need to shut down your card immediately - can I help you with that? The agent can choose to use that and show it to the customer.

Multiple compliance suggestions for other interactions are tracked and analyzed by our system. What we provide is a compliance trainer that's working at scale with all the agents. But it is easy to adjust - people within a company can change the suggestions and then go to the reporting to see how suggestions were being used over the course of time. They can drill down into altered suggestions and use the information to help the bot get better. That is how we provide the chassis for the engine as we noted previously. Users can see the actual conversation to see how the bot was used, which allows them to make the training bot considerably more effective because they can analyze the data at scale.

Companies are using this information as a type of crowdsourcing. The bottom line is that they can use our AI framework to provide compliance suggestions in real time at scale to their agents to ensure they're saying the right thing when complicated use cases arise.

We work very well with regulated industries such as financial services, insurance and healthcare. These are the use cases that our highly secure and scalable solution is built for. In the long run, we're industry-agnostic.

The Future

In the future we are investing into our AI management framework because we feel Glia can be the orchestrator for a series of tasks that agents and customers need to do. For example, let's say a company wishes to retrieve information from the backend system and present it to the agent. Then, once the agent finishes the chat, the bot assistant goes back and makes updates into the backend system and completes the busy work for the agent. We can also create teams of bots for the client and its customers to interact with, incorporating all the orchestration logic and personalization that's happening within that. Logic is a big area of investment for us this year.

We see orchestration as a big missing piece in the space. Because everybody's saying, 'here's a bot builder,' but no one is talking about the layer that sits above it: who's coordinating all of this? We're not investing in natural language processing or dedicating any of our R&D to the "let's crunch this sentence and see what it means." Instead, we're using our time to figure out the logic and how to orchestrate all these things together. Our impetus is on how we can add an IBM bot, an Amazon bot and industry-specific bot and how do we bring those together and treat them as agents?

When we talk about getting companies up and running quickly, we're focused on messaging, audio/video and co-browsing, which can be set up almost instantaneously. These are basic engagements for a company's digital properties that are ready to use very quickly. When it comes to automations, those are ongoing projects that take time and require authorization. Our flexibility and ability to innovate while also having the security, scalability and compliance capabilities that enterprise organizations require makes us a highly attractive partner.

To recap everything, customers are moving toward on-screen interactions. If you think about how everyone communicates with friends and family, they use FaceTime, What's App and social messaging. Similarly, work communications center around WebEx, Skype, Slack and Zoom. In this environment, it seems anachronistic that so much of B-to-C is still being done over the phone when everyone is already communicating visually in all other realms of their lives. We see this as a huge missed opportunity. Providing effective digital customer service can have a highly significant impact on the overall customer experience. There is a survey function in our platform that enables us and our clients to see NPS and CSAT and reduced customer effort scores increasing 15, 20, even 30% after implementing a solution that is more in line with how the customer wants to interact right now. The effect on efficiency and increased sales is huge. Beyond customer satisfaction, average handle time is also reduced because users can more quickly guide customers on how to resolve their issues. Repeat call rate is also down since companies have now taught people how to do things themselves via online coaching through co-browsing.