



# Using API Technology for Customer Engagement

A guide to the VoiceSage Optichannel platform.

Real examples of how brands are streamlining and automating the customer journey to add value, create efficiency, improve customer satisfaction, and generate revenue.



# Introduction

## Ignore the lesson at your peril...

The world's most successful businesses are new kids on the block. With Apple the first to pass the \$1 trillion milestone, and Amazon catching up a month later, these two largest companies by market cap, are relatively young.

Rather than some of the older established businesses that they have displaced which control resources and commodities, or are investment companies, the new kids have generated vast value and wealth because they have blazed a trail of technology innovation.

We shouldn't underestimate the power of technology to disrupt; complacency is a 'luxury' we simply cannot afford. Today, no business of any scale or ambition can afford to ignore the lesson: Take full advantage of technology or risk getting left behind by your peers and competitors.

The wave of software automation that is upon us is merely the first of a series. Coming technologies are going to be smarter and the impact of future waves is likely to increase in amplitude and effect. Simply put, the fruits of upcoming advances in Machine Learning and AI promise so much more.

However, many companies are failing to take full advantage of today's automation technologies. APIs have become common place, but that doesn't mean their value should be ignored.

## The rise of the API economy

The 'birth' of the commercial API can be pinpointed to the beginning of 2006.

It is no coincidence that APIs have been instrumental in the rise of many of the companies that have triumphed on the internet since then.

In 2015 Harvard Business Review said: "Salesforce.com generates 50% of its revenue through APIs, Expedia.com generates 90%, and eBay, 60%."

Out beyond 2018, the API Economy is estimated to be worth at least U\$ 2.2 Trillion.



## Customer expectation and omnichannel communication

The expectation of today's customers is to communicate their needs in real-time. More than this, they want their requests to be satisfied immediately. Many brands now see customer service and giving the customer what they require (within reason!) as a key battleground where they are able to win and retain customers.

Responding to customer requests using manually initiated electronic processes is time consuming and costly; furthermore, regulated businesses have security related compliance obligations to respond to requests within defined time limits. It is impossible to meet such short timeframe requirements by using a manual approach.

## API automation for secure and efficient omnichannel communication

API 'calls' are triggered by specific events, initiating interactions between a brand's IT systems through encrypted digital signals.

This capability enables repetitive manual processes to be eliminated. Events trigger automated responses within milliseconds, meeting the compliance requirements for security typical of financial regulatory bodies, such as the SEC and the FCA.

Companies are using APIs to realize value. Marketers are engaging more customers, customer service teams are deflecting inbound calls, brands are providing an overall better customer experience and generating more revenue by automating various touchpoints at each step of the customer journey

# Optichannel messaging

## Event-based optichannel messaging

### The business challenge

You can't provide consistently good customer-centric service if your operations are under pressure from high-levels of inbound traffic. If you have to respond to the requests of your customers by using manually initiated communication methods, it's time consuming and helps to perpetuate a permanent state of reactivity. When your contact center teams seem under pressure it sends out the wrong message.

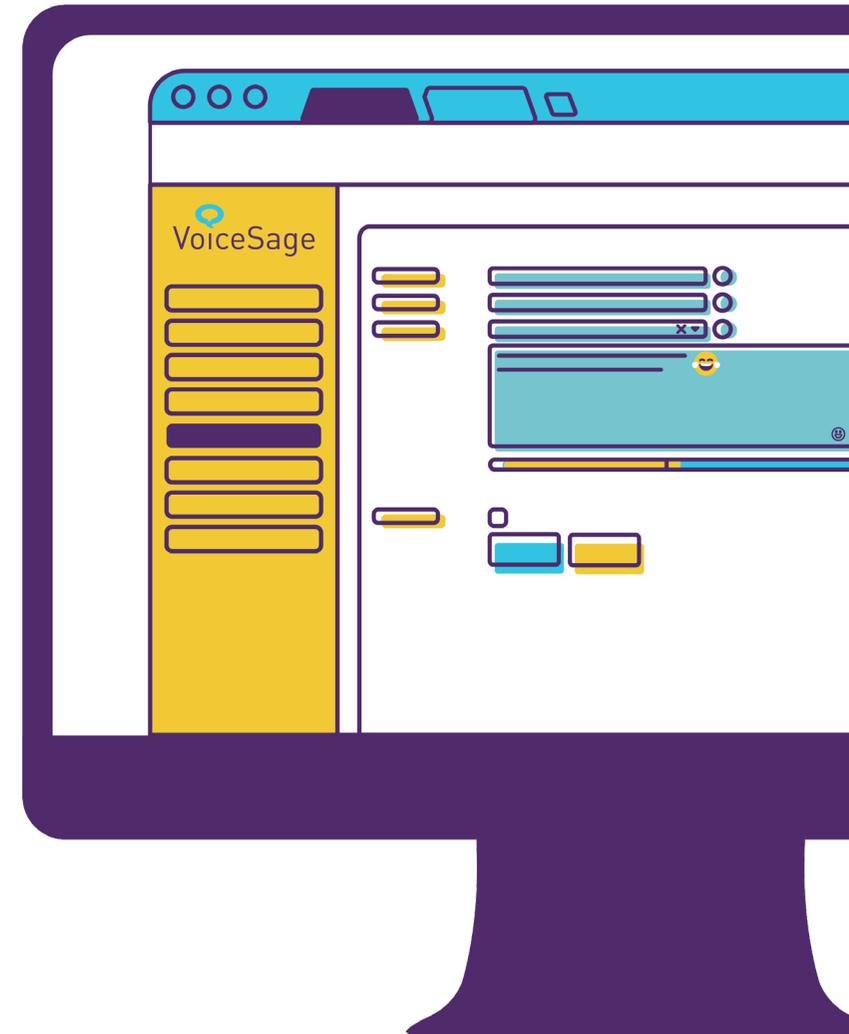
High quality service and engagement that supports good customer experience requires consistency in the communication process. This might be how you address customers, such as getting their preferred first name right, or it might be in contacting them using their preferred channel. To give a great brand experience, basics such as courtesy simply have to be right.

### Solved with VoiceSage Integrated Messaging

VoiceSage provides an API to trigger the right communication down the right channel at the right time. This enables contact centers to better organize and rationalize their activities. You take strategic control by having well-structured contact center operations that underpin great optichannel customer experiences.

With a VoiceSage API-enabled customer engagement solution you can automate sending voice, email, SMS, social media and rich media messaging. Automate and make customer service more productive. Provide the brand experience your customers want. With VoiceSage, you use the correct channel and the right content to stimulate deeper engagement and more meaningful interactions with your brand.

However, many companies are failing to take full advantage of today's automation technologies. APIs have become common place, but that doesn't mean their value should be ignored.



# Marketing and Promotions

## SMS and Rich Media Messaging integrated with your CRM

### The business challenge

It's becoming increasingly difficult and costly to engage with new potential customers.

The results from emailing can return pretty meagre levels of engagement. And in the EU, at least, GDPR seems to have made an impact on what was once legitimate outbound activity.

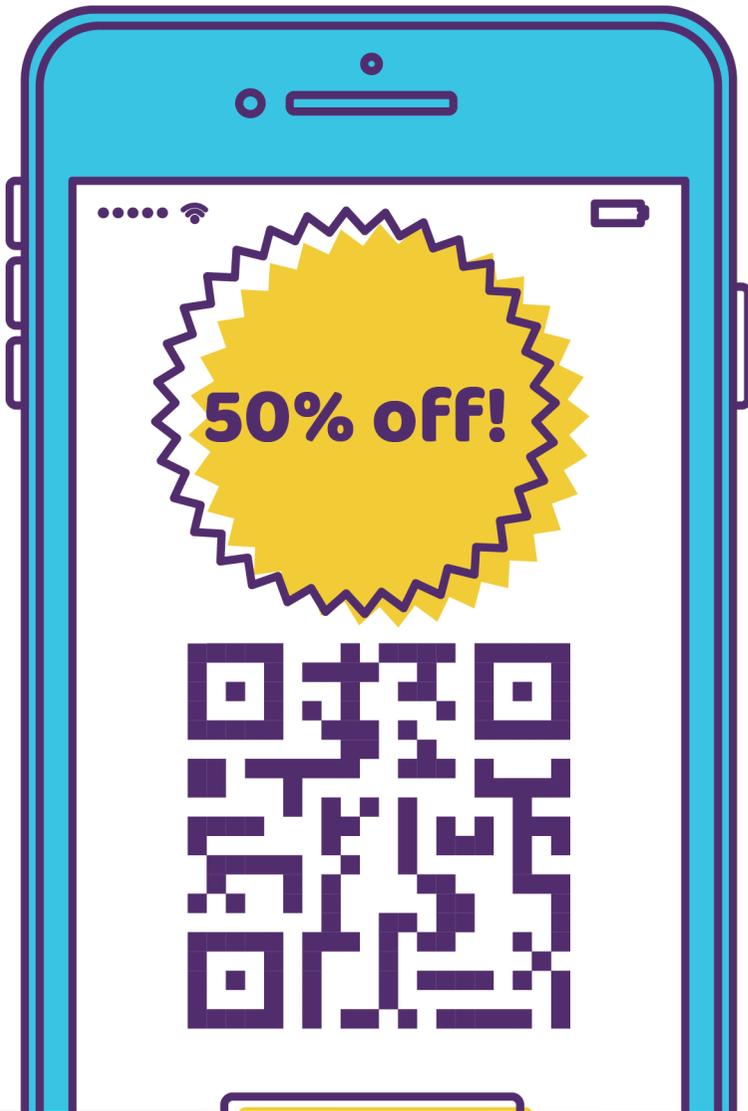
PPC costs are rising. The reasons are a little unclear, but some industry observers believe official data from the search engines is sparse and may even be misleading. Investing money in apps to make your brand 'sticky' can seem like a poor decision when you consider the majority are never used, or just deleted. In short, many brands are experiencing difficulties uplifting CX, reaching out to both customers and new prospects to bring in revenue.

### Solved with VoiceSage Integrated Messaging

VoiceSage API-enabled integrated solutions deliver interoperability between your CRM and reporting tools. This lets you automate the sending of personalized, rich media campaigns. With a VoiceSage direct marketing solution you can deliver a range of content to drive engagement and create richer brand experiences.

VoiceSage creates a bespoke solution which integrates your existing CRM and analytics applications. Reach out with content including video, surveys and feedback forms, promotion codes, and more. Simply create content with a simple to use drag and drop Mobile Landing Page Builder which gives all the functionality of an app.

Reach customers and prospects using powerful, stimulating brand-led messaging across all cellular networks and mobile devices with VoiceSage.



# One Time Password and Two Factor Authentication

## Financial services One Time Password SMS security messaging

### The business challenge

Cybercriminal activity is sophisticated; the threat is agile and continually evolving and data security is an over-arching consideration. Cyber security is never more important than where it touches the financial services industry.

Financial services watchdog organizations, PCI DSS compliance and the era of Open Banking are just some of the factors that have collided and led to the creation of a strong regulatory framework which poses some challenges to the financial services industry. One aspect of this is the time requirement for One Time Password (OTP) communication.

### Solved with VoiceSage Integrated Messaging

VoiceSage uses an API to enable the banking industry to authenticate online or mobile payment instructions by customers. Regulations demand that OTPs must be generated and sent immediately. Within the VoiceSage payments solution an API call triggers the process.

The OTP for online or mobile is generated and sent within 2 seconds. For the authentication process resulting from voice calls, the VoiceSage API call triggers the OTP generation and SMS sending process within 10 seconds.

VoiceSage OTP authentication is just one of a range of sophisticated API-enabled functionalities for financial services organizations. Automated, branded optichannel messaging maximizes first-time Right Party Contact for ecommerce payments. VoiceSage rich media text based messaging for credit collection is shown to outperform other common methods of clearing up debts.



# Delivery and fulfilment communication

## Confirm delivery details with event-based messaging

### The business challenge

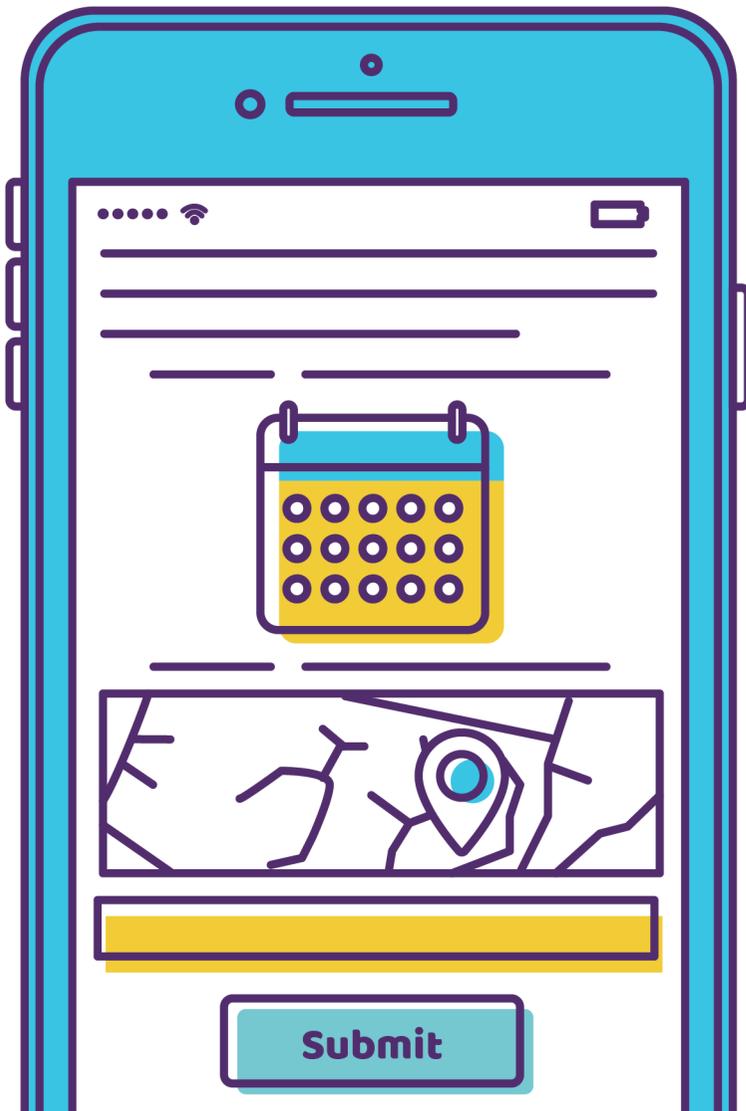
After orders have been placed through ecommerce websites, multichannel retailers often receive telephone calls from online shoppers. Many calls are simply to confirm order and delivery details.

This is responsible for a large amount of unnecessary, avoidable inbound call center traffic. Responding is grossly inefficient, but to provide the experience customers' expect, the calls have to be answered, right? Inevitably, this soaks up the time of inside sales and customer service. Frequently, margins are tight and ultimately the bottom line takes the hit.

### Solved with VoiceSage Logistics

With VoiceSage API-enabled communication you leverage an API to head-off customers making these unnecessary inbound calls. Triggered by the processing of an online sales order, the API call generates an SMS or an email capturing all the details. This is automatically sent within seconds, confirming the details of every order and pre-empting any intended call by the customer.

Implemented as part of a VoiceSage integrated contact center and customer care solution, this automated event-based messaging eliminates inefficiency and protects margins while promoting customer engagement and satisfaction to make your brand stand out.



# Instore engagement

## Connect with customers close-by with location-based messaging

### The business challenge

A retail environment is an important point of engagement because it provides the face-to-face opportunity that's absent from other channels. But there are challenges in truly integrating this as part of an omnichannel engagement strategy.

Maximizing the engagement opportunity provided by your customers' instore presence gives you the ability to stand out from your competitors. However, you often don't know when they are instore, and the chance to engage, establish a dialogue and build on what you already know about them is frequently lost.

### Solved with VoiceSage Proximity

VoiceSage API calls trigger the sending of branded messaging when customers are in the proximity of a physical location. Smartphones and tablets with Bluetooth active signal the presence of customers in the CRM database, enabling personalized messaging directly to each customer's device. This lets you maximize the potential for engagement.

Build your intelligence around each customer with a mobile data collection survey. Or be really creative; offer personalized experiences such as product demos, tailor exclusive instore 'just for you' deals and give them 'money can't buy' experiences.

Other applications of a VoiceSage proximity based messaging solution include maximizing engagement opportunities on an interpersonal level at an Expo or event. Or personalizing visitor experiences. In hospitals, it may be wayfinding by providing directions to help service users navigate through large sites and alerting of other services. In a visitor attraction, like a museum, it might be to alert about exhibits of special interest.



# Monitoring performance

## Data aggregation to see performance in real-time

### The business challenge

As consumers we want our needs satisfied immediately; similarly in business, we need the latest information about how our businesses are performing at our fingertips. Yet, many business intelligence tools only provide this at the close of each day's business.

Sales orders are a leading indicator of which every sales manager wants a heads-up.

In the contact center you might want to know how well your teams are performing. Logistics managers might want to understand the relationship between first time delivery and fuel costs.

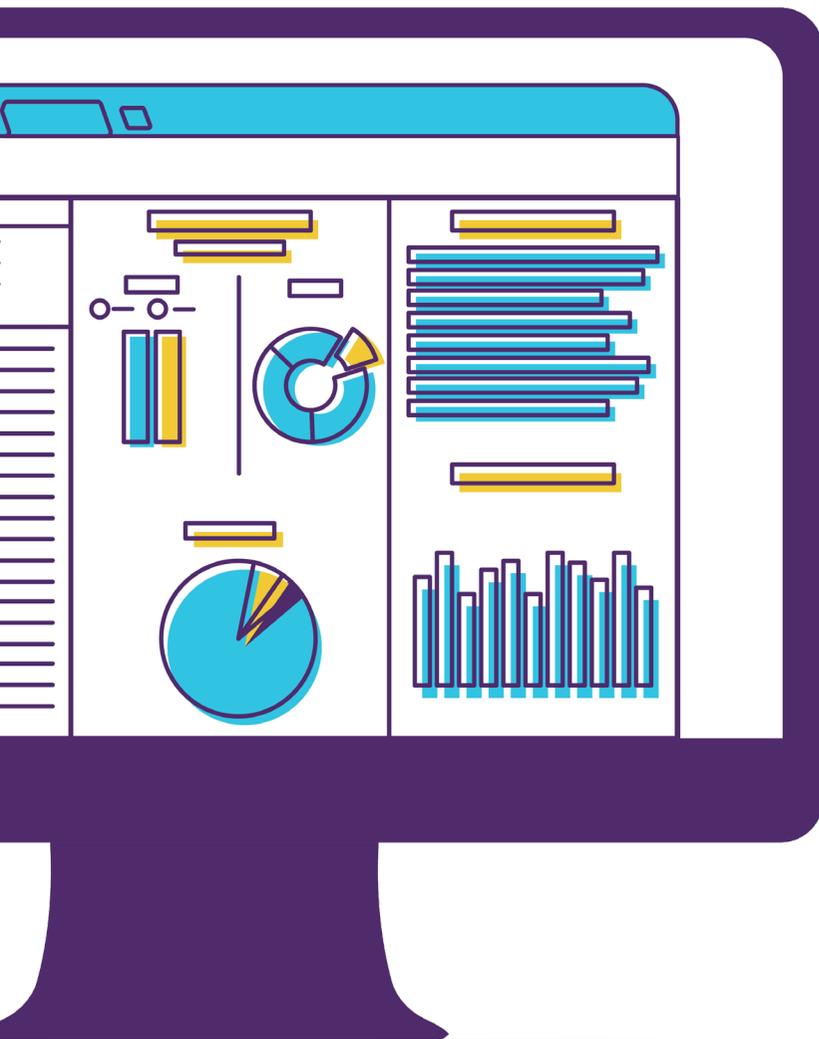
Whatever facet of your business you want to look at, you need access to the latest data, because you can't respond correctly to what's happening right now using yesterday's figures, can you?

### Solved with VoiceSage Analytics

With a VoiceSage API-enabled analytics solution which implements a streaming API, you get a real-time view of how your business is performing. Get updated sales information order-by-order, automated and streamed live to your management applications. See the productivity of individual agents, customer service and inside sales teams. Identify trends and understand how you might be able to improve the efficiency of logistics.

No more waiting and wondering. Make better decisions on the fly. Respond faster to create greater efficiency and reduce costs.

API-enabled reporting seamlessly integrates into your enterprise-wide business intelligence processes. From the fine detail all the way up to the big picture, VoiceSage Analytics lets you zero in on the information which helps you make better data-driven decisions.



# Appointment scheduling

Allow customers to schedule and reschedule any type of appointment

## The business challenge

People are busy, distracted and forgetful. This is a perfect recipe for customers to

forget about appointments. You name it! Visits to home or office for scheduled parcel deliveries and field service technician call outs; or customers' coming to you for something like a clinical appointment for example, whatever the reason, missed appointments cost too much time and money.

These are inefficiencies which are largely avoidable, because offering the opportunity for re-scheduling before the first delivery attempt or allotted hospital time slot would allow the customer to shift the appointment to a more convenient day and time.

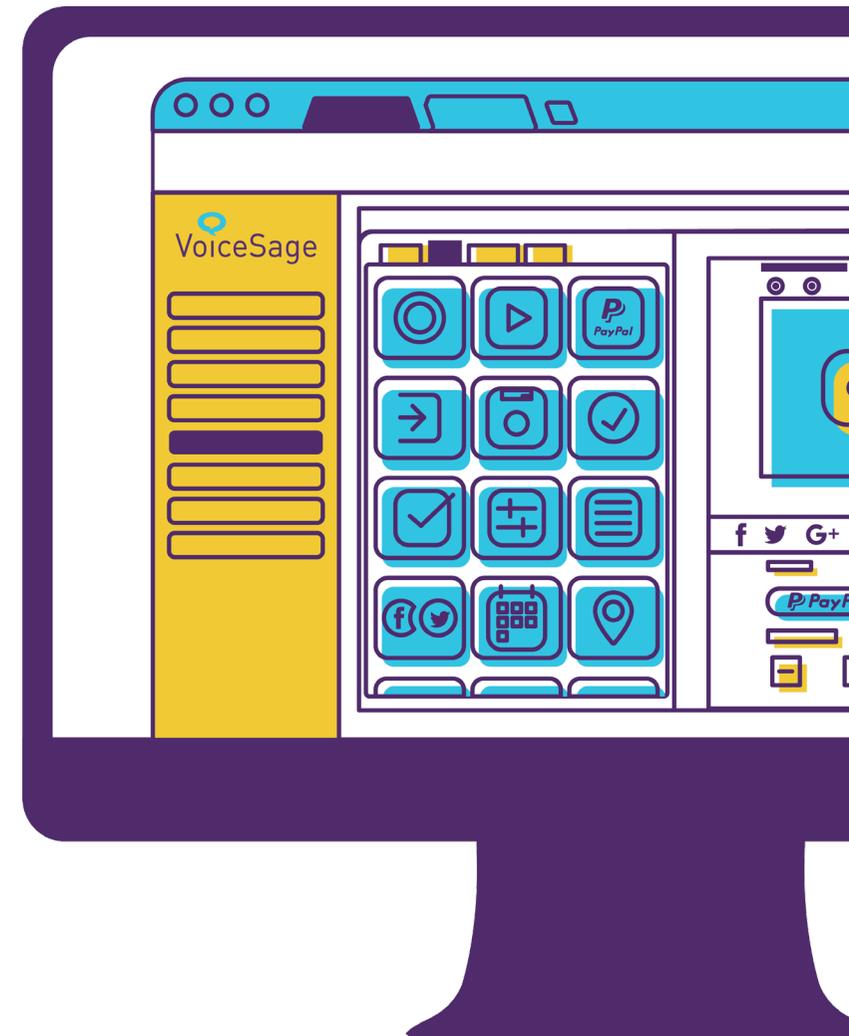
## Solved with VoiceSage Rich Media Messaging, and Automated Two Way SMS

SMS is the top-performing channel for engaging with customers. Contacting and reminding by SMS is the most successful form of direct messaging and engagement. Enhancing this with Rich Media and Automated chat can bring more efficiencies and better customer experience.

With a VoiceSage API-enabled solution, an automatic reminder notification sent via SMS is more likely to be read than an email. SMS provides flexibility in allowing customers to interact.

Automation allows customers to reschedule or confirm availability, by sending "Will you be able to attend? Y or N" as part of the message. If not, they can reschedule through a follow up Rich Media Message, a call to/from an agent, or even via text SMS. A 'save the date' feature can insert the appointment into a calendar app.

With messaging automation and rich media, the costs of missed first time deliveries, house call appointments and 'Did Not Attends' for outpatients are squashed, improving operational efficiency and reducing unnecessary costs.



# Ecommerce and Retail

## Reduce Shopping Cart abandonment and enable Click and Collect

### The business challenge

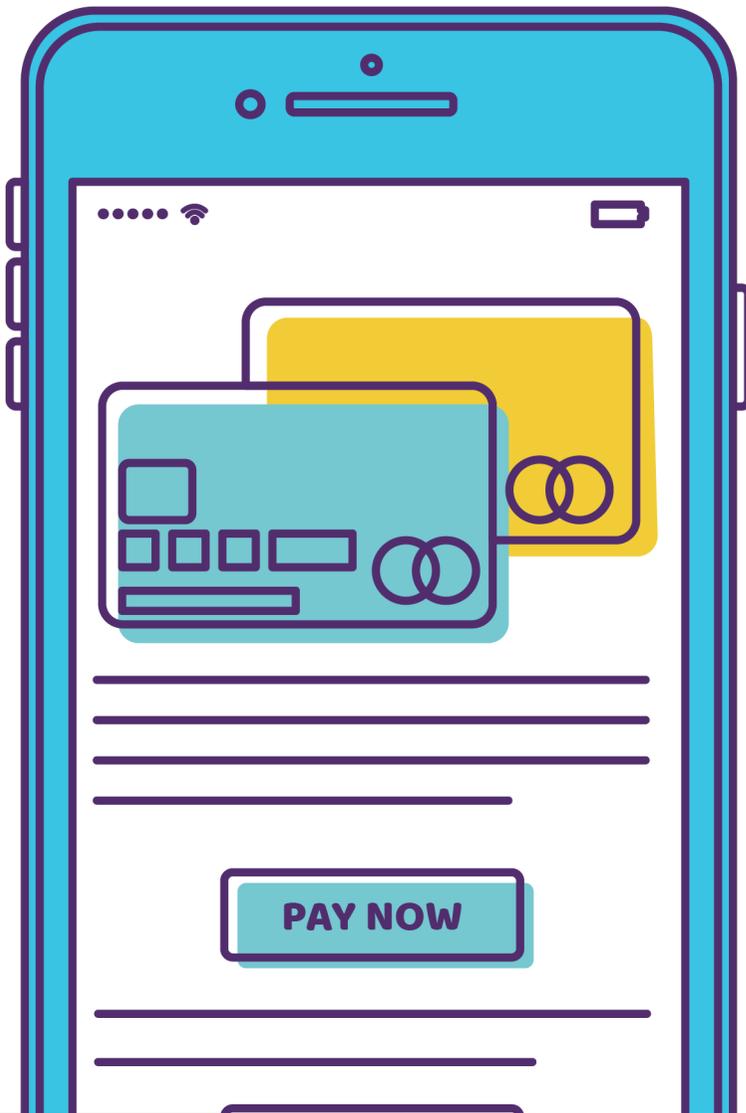
Shopping Cart and Basket abandonment is one of the big challenges facing ecommerce stores. Losing sales and often, without knowing why is a frustrating puzzle. Email reminders to revisit an abandoned ecommerce shopping cart have proved useful, but they don't always bring about the desired response.

Demand for more customer convenience is driving the growth of Click and Collect instore or from outlets of a third party partnership. But sometimes customers are often left waiting or misinformed about fulfilment dates leading to dissatisfaction, simply because the dots are not all joined up.

### Solved with VoiceSage Analytics

Voice Sage API-enabled messaging provides an intelligent approach to tackling these challenges. You can send a reminder to customers about their abandoned cart, including a link to recover it. To incentivize purchase, you can automate the inclusion of a promo discount code using rules that let you set a minimum order value.

To join up Click and Collect so that it doesn't lead to disappointment and frustration, automatically keep customers up to date on the status of deliveries and let them know when it is going to be instore. Also, communicate with the instore team to let them know the instore location of items. With VoiceSage, you create the positive brand experiences that keep customers coming back.



# Summary

Technology-enabled customer service is increasingly being used by brands to provide better customer engagement, enabling standout in crowded and noisy marketplaces.

Leading brands use the VoiceSage optichannel communications platform to add value to customer engagement. On its own, API is a 'naked' technology. To truly serve the purpose of driving engagement with today's consumers using optichannel communications, VoiceSage integrates API functionality within a suite of well thought out and expertly engineered solutions.

Across the four core solutions areas of Contact Centre, Credit Collections, Logistics and Direct Marketing, deployment is customized and fine tuned to the requirements of each client's requirements.

Deploying technology is not like a card game. You cannot choose to sit out a round or fold a hand because your cards are not favorable. You have to remain constantly engaged with tech, deploying solutions, reviewing results and adjusting your approach in line with changes in the marketplace and advances in technology.

For businesses that want to remain at the forefront of advances in customer engagement technologies, VoiceSage is an essential partner which delivers value now and which has the vision and expertise to enable it to continue to do so in the future.





# The VoiceSage Difference

Flexibility combined with first-class technical expertise and client services

VoiceSage brings together three key elements:

- **Supreme flexibility:**  
VoiceSage can deploy as a Full Managed or a Self-Service solution, depending on the capabilities and needs of your business or organization.
- **Outstanding technology:**  
VoiceSage is designed and built to the highest standards by experienced experts in digital communications with industry-recognized credentials.
- **Client-focused customer service:**  
Because the quality of brand experience you deliver to customers reflects the quality of our support for your optichannel communications.

# Why VoiceSage?

We deliver proactive customer engagement solutions that help companies and public sector organizations, including the Shop Direct and PayPal, streamline and add value to their outbound contact activities.



*"VoiceSage listened to what we wanted to achieve, added value and met our challenging timescales, delivering what we needed within an exceptionally tight timeframe."*

**Shop Direct**



*"We use VoiceSage primarily for contacting customers in arrears with PayPal. Their systems and platforms are straightforward and easy to use – and their online user interface and portal for launching campaigns is really best in class."*

*From a compliance and legal perspective, we have found them professional and buttoned-up, have had no issues with them in this regard. We have also found them flexible and good partners overall where they understand our requirements, and work to our standards."*

**Director of Collections | PayPal**





## Contact

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# About VoiceSage

Founded in 2003 and headquartered in Dublin and Birmingham, UK, VoiceSage has deep heritage and experience in delivering transformational interactive customer communications solutions that streamline and add value to high-volume contact activities.

Household brands, including PayPal, ShopDirect and Capital One, rely on VoiceSage to reduce inbound call volumes, increase appointments and deliveries, reduce debt and enable real-time customer conversations.

VoiceSage cloud-based messaging products and services deliver more than 2 million messages a day. In the UK alone, more than 44 million individual phones have received a VoiceSage message at some time.

As a privately held international communications technology company leading the way in automated customer contact communications, we deploy class leading interactive messaging solutions.