

PROCESS HEATMAP: CUSTOMER SERVICE AND CONTACT CENTER

● Attended Robot Potential

Highest Automation Potential 

Self-service		Assisted service				WFM
Channels	Processes	Start of interaction	Sales and marketing	Inquiry	Service	Service
Voice bots	Password reset	Application login / single sign-on	Account/customer creation or lookup	Order or shipping status	Change of address or account details	Schedule creation and maintenance
Chatbots	Account inquiry or update	Screen pop	Product or service lookup	Find a location/store	Change of plan/service/order	Agent KPI analytics
Email	Find a location/service	360° View	Configure, price, quote	General product or service inquiry	ACW, notes, and wrap-up	Agent engagement and gamification
SMS	Order processing or inquiry	Cross-app data sharing	Order processing	Account inquiry	Lookup knowledge article	Agent offboarding
Fax, mail	Make a payment	Transfer	Next best action (upsell / x-sell)		Collaborate with SMEs	CallcentreKPI analytics
Social	Purchase order mgmt.	Sentiment analysis	Payment processing		Fraud detection and management	
Web & mobile	Report fraud or complaint	Agent scripts or task flow	Campaign linkage and attribution		Create case or complaint	
	Appointment or service scheduling					