

The Foundation for a  
Successful Email  
Management System

# The Foundation for a Successful Email Management System

## Overview

Many companies are moving towards providing customer service via email. In some cases email becomes the primary support means, in other cases email is used to supplement existing telephone-based service. In all cases, companies find that the techniques for designing and deploying an email-based customer service system are very different than those used in traditional call center systems. There are new concepts and business models which, when used properly, can be used to deliver quality online service.

This document describes some of the best practices that have emerged during the course of many implementations of eGain Mail. The focus is on how a typical email-based customer service system is often implemented and used. It is written specifically for customer service line managers and technical specialists who are directly responsible for its design and/or deployment.

The topics covered in this paper include:

- How to design ticket boxes and routing rules
- What are the different types of response tools and what is the best way to use them
- How email is received into the system

Online customer service systems use many terms for parts of the systems, and these terms often differ from those used by traditional telephony-based systems. Since terminology varies from application to application, all examples used within this paper are based on the terminology of eGain Mail. Terms used by eGain include: ticket box (similar to a “queue”), routing rule (similar to “business logic”), user (“customer service representative”), and email alias (the email address where customers send their email).

## General Design Considerations

The best way to organize the design process is:

- Step 1: Design your ticket boxes
- Step 2: Design your routing rules
- Step 3: Specify your automatic response rules
- Step 4: Specify your email address aliases
- Step 5: Specify the user logins and user access rights

## Ticket Box Design

Ticket boxes are the basic building block of any eGain Mail system. Ticket boxes contain “tickets.” A ticket is a collection of emails, both sent and received, that relate to a single issue.

When a new email is first received and read into eGain Mail, it becomes part of a ticket and is assigned a ticket number and then routed to a ticket box. Tickets can be forwarded or moved, but only one ticket box owns a particular ticket at any time.

### GUIDELINES FOR TICKET BOX DESIGN:

Use two or more levels of ticket boxes.

1. The **higher level boxes** represents areas or departments such as services, sales, marketing, webmaster, etc. Typically you will have a single incoming email alias for each area.
2. The **lower level box** represents a customer service representative, product, or a common problem (such as lost password).

Managers and administrators should have their own ticket box so they can handle escalations from agents or similar issues.

## Routing Rules

An email management system is built from a collection of individual routing rules. In eGain Mail routing rules are always assigned to ticket boxes. Each ticket box can have as many routing rules as needed.

### “AGENT PULL” VS. “AGENT PUSH” MODEL:

At the highest level there are two types of routing models: “agent pull” and “agent push.” It is critical that an email management system support both types of models.

Agent pull is the older model and is similar to the telephone queues used in a traditional support centers. Call center agents can handle only a single call at a time. To receive the call the system “pulls” the call from a central queue. Once they have finished with the call they answer the next call in the queue.

This model can be applied to email as well. It is well-suited to situations where there is a big incoming pool of issues which are then handled by a large group of agents. This model is especially advantageous when the agents are working in shifts. For example, let’s say you have three shifts of agents. With the pull model, the agents who leave at the end of the shift will only have a few open issues remaining. This makes it easy to transfer these issues to another agent.

The push model, a newer form of routing that has come into use, is based on emails being “pushed” or sent into an agent’s ticket box without the agent having to retrieve the messages. It is useful in many situations where you want to collect tickets with a single agent. The push

model is commonly used in skill-based routing, when all messages regarding a specific issue are pushed to an agent with that particular expertise.

**BASIC ROUTING RULES:**

Routing rules in eGain Mail come in four basic forms: keyword routing, round robin routing, load balance routing and forwarding. Each of these routing rules is described in the table below. These rules can, and often are, combined together to make a more complex system.

<b>TYPE:</b>	<b>DESCRIPTION:</b>	<b>BENEFIT:</b>
<b>Pull Routing</b>	This type of rule enables agents to pull email from various incoming ticket boxes to their active working ticket box.	Allows agents to get and work on a limited number of email. Useful when agents work in shifts or handle a large amount of undifferentiated email.
<b>Keyword (Skill-based)</b>	The incoming email is routed to a ticket box based on a keyword.	The email is sent to the person most suited to handle it, often based on skill or knowledge.
<b>Round Robin</b>	Each ticket box within a group of ticket boxes receives an email in turn, one after another. For example, after a ticket box receives an email, the next email goes to the next ticket box until all the ticket boxes have received an email. This process repeats itself as new emails enter the system.	Ensures an even balance of email between a set of agents.
<b>Load Balance</b>	The incoming email goes to the agent who has the least number of open emails.	The email is routed to the person with the most current "bandwidth."
<b>Forwarding</b>	The incoming email is automatically rerouted to another specified ticket box.	Temporarily forwards email when an agent is on vacation or otherwise unavailable.

**EMAIL ROUTING AND KEY WORD CONFLICT:**

Sometimes when routing is done with keywords, the keywords may conflict. To solve this problem you must examine the order of the routing rules. For example, let's say you have set up a rule to route email containing the word "chair" to Mary and email containing the word "table" to Bob. Now you get an email that contains both "chair" and "table." Where does this email go? It depends on which rule executes first. If you set the order so that the "chair" rule executes first, then in this case, all email containing the words "chair" and "table" will go to Mary, not Bob.

While some small percentage of emails may be mis-routed, most are routed properly. If you find that many emails are ending up in the wrong ticket box you may want to consider adding multiple keyword routing rules, not just one. However, keep in mind that it is best to keep your search to single words such as looking for "new" and "chair" rather than looking for phrases such

as “new chair.” The problem with phrases is that customers often don’t type the phrase exactly as you may expect. Customer may write “new office chair” causing the routing rule not to perform as expected. eGain Mail also allows you to create more sophisticated routing rules using statistically-based artificial intelligence.

To ensure correct routing and increase your email handling efficiency post a notice on your Web site asking customers to send separate email messages for each problem they are experiencing.

#### WEB FORMS AND KEYWORD CONFLICT:

Another option to resolve keyword conflict is to use a Web form with a pull down menu, such as a product or complaint list. If a customer can only select a single item this will encourage the customer to send in a new email for each separate issue.

If you are using keyword routing and the ticket does not match any keyword, you have several options to resolve the problem. You can create a ticket box to hold the non-routed tickets and assign someone to handle them. Or you can use round robin or load balancing rules to distribute the unidentified tickets among a selected set of agents.

### **Responses**

Auto-acknowledgements and automated responses are powerful tools that can dramatically increase customer satisfaction. But it is important to implement these functions properly in order to get the maximum benefit and to ensure you do not upset customers while you implement and fine tune your system.

#### AUTO-ACKNOWLEDGEMENTS:

Auto-acknowledgements are emails that are sent back to users that inform them their message has been received. Other types of information can be included (see guidelines below), but auto-acknowledgements do not answer the customer’s question. Auto-acknowledgements are one of the quickest and easiest ways to increase your customer satisfaction. By letting your customers know their email has been received, you are re-assuring them that their inquiry is being handled. Auto-acknowledgements also give you a chance to set realistic expectations as to when the customer should expect to receive a response to their inquiry.

#### AUTOMATED RESPONSES:

Automated responses are automatic answers to customers’ questions. Automated responses can provide an extremely high degree of customer satisfaction at a very low cost. They can deliver fast answers 24 hours a day. However, automatic responses have some limitations and can be damaging if not implemented carefully. If the automated responses return inaccurate answers, or if they screen away customers who need to reach a live agent, then they may act to lower, rather than raise, customer satisfaction.

There are a number of steps to safely implement complete automated responses. We recommend the following steps:

**STEP 1: *Auto-Acknowledgement***

- Immediately implement simple auto-acknowledgements. This practice has been proven to raise customer satisfaction levels.

**STEP 2: *Auto-Suggest***

- Have your agents use “auto-suggest.” This feature will analyze the email and present your agent with a suggested answer. This method helps you test various answers to see how effective they are as a response. It also helps make your agents more productive and accurate.
- Once the auto-suggest response has been proven to be an accurate answer, agents no longer need to review the message before sending it, hence it can be converted into an automated response.

**STEP 3: *Automated Response***

- Implement automated responses, thus reducing the need for an agent to touch every incoming email. The system automatically scans the email and sends an automated response based on key word matches within the message.
- The customer should not be sent an auto-acknowledgment.
- The ticket is closed automatically.
- Agents will not see these tickets unless the customer responds again. If this occurs, the email will always be sent to an agent (eGain Mail will not follow an automated response with another one).

GUIDELINES FOR AUTOMATED RESPONSE CONTENT FOR  
AUTO-ACKNOWLEDGEMENTS

- Thank the customer for communicating with the company.
- Let the customer know you received their message.
- Tell the customer the email is an auto-acknowledgement. Make sure they do not mistake the email as one coming from a live person.
- Give them the expected service response level (when to expect an answer).
- Give them alternative contact information (such as a phone number) in case immediate attention is required.

#### FOR AUTOMATED RESPONSES

- Identify your company.
- Thank the customer for communicating with you.
- Tell the customer how to respond if the email does not answer their question. In particular, tell them **NOT TO REMOVE THE TICKET NUMBER** from the subject. This will ensure that subsequent replies from the customer are attached to the same ticket.
- Let your customer know the email is an automated response. Make sure they do not mistake the email as a message from a live person.
- Apologize if the response does not answer their question.
- Give them alternative contact information (such as a phone number) in case immediate attention is required.

#### BEST PRACTICES FOR THE SUPERVISOR:

- Set up alarms on agent ticket boxes to ensure that no one agent is “overloaded” or falling behind in responding to emails. There are two types of alarms you can set up. One warns you whenever an agent has more than an allotted number of open tickets. The second alarm warns you whenever an agent has any tickets for more than a specified time period (such as 48 hours).
- Set a precise corporate guideline for all your agents, such as “all emails must be responded to in 24 hours.” Remember you can change your guideline depending on your resources and objectives. Once you are comfortable you can meet the guideline, publish it on the Web for your customers to see.
- Encourage your agents to escalate issues which they are unable to resolve to your ticket box. This will help you identify trouble spots for additional training.
- Don't forget you can “drop in” on your agent communications as desired. Do this by simply switching to your agent's ticket box and scanning random selection of answers.

#### Email Aliases

Email aliases are the email addresses where your customers send their questions, e.g. “services@yourcompany.com” or “info@yourcompany.com.” eGain Mail allows you to retrieve email messages from as many different aliases as you wish. For each alias you will need to specify the initial ticket box into which the email should be routed.

It is good practice to set up a separate email alias for each incoming area, such as sales, support, services, etc. This helps with tracking and reporting. It also encourages customers to send the “right” topic to the right place, and not to mix different types of questions in one email.

#### RECEIVING EMAIL INTO THE EMAIL MANAGEMENT SYSTEM:

The eGain system is completely independent from the POP3 email server. In general, companies use their own POP3 server to receive customer email and their own SMTP server to send email responses back to the customer.

#### HERE IS AN OVERVIEW OF HOW THE SYSTEM WORKS WITH AN EMAIL SERVER:

- The eGain system retrieves email from specific email addresses on the POP3 server and stores them in the eGain database. The administrator determines how often the system retrieves incoming email.
- The administrator must decide if a copy of the retrieved email should be left on the POP3 server. Leaving copies on the server is useful as a backup during the initial implementation and testing stage.
- eGain Mail retrieves email from multiple incoming email addresses and re-routes the incoming email to the appropriate ticket boxes for processing.
- Outgoing email is sent from the eGain system to an SMTP email server and then to the customer.

eGain allows you to keep copies of your emails on the POP3 server. Leaving copies on the server is useful during the initial implementation and testing stage. Those emails left on the server are a backup in case something goes wrong. After the system has been fully deployed it is best, for performance reasons, to download the email from the server and to perform regular backups of the eGain database.

#### **Users and Security**

User logins exist for two reasons: security and tracking. The user login controls who can access the system and what data and functions they can use when they are logged on. The login also tracks all the activity of a person whenever they are using the eGain system. Each person, including agents, managers, and administrators, should have their own login IDs.

#### AGENT ACCESS RIGHTS:

- Usually agents can only access their own incoming ticket box. Some systems are set up where agents can access multiple ticket boxes. Agents are often limited in their access to reports.

- Regardless of access, agents should be able to escalate, or re-route tickets to any other ticket box.

#### MANAGER ACCESS RIGHTS:

- Managers usually have their own ticket box.
- Managers should be able to see their own ticket box, the ticket boxes of their agents, and the departmental or area ticket box.
- Managers can usually access all reports.
- Some managers will be allowed system administration level access, some will not. This varies by implementation.

#### SYSTEM ADMINISTRATOR RIGHTS:

- System administrators have access to the entire system.
- System administrators generally do not have a ticket box.

### **Summary**

As companies evolve their contact centers to include email management, they must remember that each email sent to a customer is a reflection on the company as a whole. By setting up proper ticket box designations, routing rules and automated responses, companies will ensure that their customers receive prompt, accurate, professional answers to their questions. Customer service representatives, supervisors, and administrators will reap the benefits of a thoughtfully designed workflow each time they login to eGain Mail.