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Customer contact services - Requirements for collaboration between live agents and intelligent customer service

顾客联络服务 人工与智能客户服务协同要求

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Foreword

This document complies with the provisions of GB/T 1.1-2020 "Standardization Work Guidelines Part

1.Structure and Drafting Rules of Standardization Documents". Drafting. Please note that some content in this document may involve patents. The issuing organization of this document assumes no responsibility for identifying patents. This document was proposed and is under the jurisdiction of the National Technical Committee on Service Standardization (SAC/TC264). This document was drafted by: China National Institute of Standardization, China Southern Power Grid User Ecosystem Operation Co., Ltd., and China Academy of Information and Communications Technology. China Academy of Civil Aviation Science and Technology, Shenzhen Shifang Ronghai Technology Co., Ltd., Beijing Dongfang Caibo Enterprise Management Consulting Co., Ltd., Ant Zone Blockchain Technology (Shanghai) Co., Ltd., Beijing Branch of China United Network Communications Co., Ltd., Guangdong Branch of China United Network Communications Co., Ltd. Provincial Branch, China Mobile Online Marketing Service Center, China Unicom Online Information Technology Co., Ltd., China Telecom Consulting & Design Institute Co., Ltd., and Guangdong Dongguangxin Communication Service Co., Ltd., Guangdong United Electronic Service Co., Ltd., Hunan Provincial Expressway Network Toll Collection Management Co., Ltd. Great Wall Life Insurance Co., Ltd., Hisense Group Co., Ltd., Gree Electric Appliances,

Inc., and TCL Industrial Holdings Co., Ltd. The company, Yadea Technology Group Co., Ltd., Bairong Cloud Innovation Technology Co., Ltd., Taiying Technology Group Co., Ltd., Ningbo Fotile Marketing Limited Liability Company, Qingdao Haier Lexin Cloud Technology Co., Ltd., Ninebot Technology Co., Ltd., Sichuan Tianyi Call Technology Co., Ltd., Ningbo Meimeijia Yuan Electric Appliance Service Co., Ltd., Inner Mongolia Mengniu Dairy (Group) Co., Ltd., Ningbo Qitaotao Information Service Co., Ltd., Customer Observation (Hangzhou) Digital Media Co., Ltd., Hunan Chensheng Information Technology Co., Ltd., and China Resources Gas Holdings Co., Ltd. The main drafters of this document are. Li Zipeng, Fu Qiang, Zheng Juan'er, Jin Zongzhen, Wang Qi, Kang Feng, Xu Rui, Cai Jitao, Hou Fei, Wang Nana, and Shi Zhongjin. Diao Zipeng, Yu Dingyao, Li Hongtao, Cai Huali, Wu Yansong, Lei Langsheng, Pang Junying, Liu Bin, Wang Long, Xu Ning, Fu Haiyan, Li Fangjian, Yang Nan Li Xiaoyan, Yu Lingyang, Li Shenghui, Wang Wenmin, Han Yong, Fu Gang, Liu Deming, Zhou Hang, Gong Boxuan, Gong Xiao, Shao Zefeng, Yan Li, Yu Xin, He Yilin Zhang Rongsheng, Wu Jingyu, Hong Kai, Ji Wenyao, Chen Peng, Wang Debao, Zheng Ying, Li Bianfang, Tang Linli, Fu Bin, Cheng Cheng, Lin Lei, Xiao Zijing, Cui Ming.

This document closely follows the new trend in customer contact services where intelligent customer service and human customer service are deeply integrated, focusing on solving customer issues in this scenario. The core issue is balancing customer service efficiency and service experience. This is addressed through standardized systems for inbound and outbound call processes, service termination, follow-up handling, and information processing. By improving key aspects such as security and collaborative services, we can effectively enhance customer service operational efficiency while further ensuring and optimizing the customer service experience. This document aims to achieve a dual improvement in service quality and operational efficiency for organizations across various sectors in the context of technological change. Quality development provides a comprehensive and practical standardization basis. Customer contact service Requirements for Collaboration between Human and Intelligent Customer Service

1.Scope This document specifies the general requirements, inbound call tasks, outbound call tasks, and service termination procedures for real-time collaborative work between human and AI customer service. Improvements to follow-up processing, information security, and collaborative services. This document applies to the operation and management of organizations that provide both human and intelligent customer service.

4 General Requirements

4.1 Well-established organizational support Customer contact centers should provide appropriate organizational support for the collaboration between human and intelligent customer service, including but not limited to.

---Based on industry characteristics, provide human customer service that matches user needs;

---Establish an organizational system that adapts to the collaboration between human and intelligent customer service;

---Establish emergency response mechanisms for scenarios such as disasters and system failures;

---Clearly define the organizational structure for collaboration between human and AI customer service;

---Build an internal system that includes customer information management and work order processing;

---Provide customer service access in a clear, prominent, and unambiguous manner, such as prominently displaying "Customer Service" in large print at the top of the website homepage;

---Establish a knowledge base;

---Regularly conduct intelligent customer service optimization training to train customer service personnel;

---Other organizational safeguards that support collaboration between human and intelligent customer service.

4.2 Clear division of responsibilities The responsibilities of human customer service and AI customer service should be clearly defined. AI customer service should prioritize standardization. For questions with high difficulty and clearly defined answers in the knowledge base, human customer service should prioritize those requiring multi-step analysis or integration of multiple information sources. The questions answered, and the issues that intelligent customer service failed to resolve.

4.3 Smooth service experience Customer contact centers should prioritize customer experience, seamlessly integrating human and intelligent customer service to ensure customers have a positive experience. The transition between human and intelligent customer service should be seamless, and the system should synchronously transmit customer information when switching between the two. Key data such as information and historical interaction records are collected to ensure service continuity.

4.4 Service security is controllable Customer contact centers should establish information and data security mechanisms, including data acquisition/processing/use, as well as security management of models, personnel, etc. This mechanism ensures data security and traceability throughout the entire service process, preventing data leaks and making risks traceable.

5.1 Incoming Call Task Allocation

5.1.1 General Requirements The customer service system should provide a clear,

prominent, and unambiguous entry point for customer service, such as prominently displaying "Customer Service" in large print at the top of the website homepage. "Service". At the beginning of customer service, the customer service system should assess the system's problem-solving capabilities, overall call volume and handling capacity, and the customer group. (For example, the acceptance level of elderly customers) towards intelligent customer service should be considered when allocating work orders appropriately to either intelligent or human customer service for processing, and through... Provide users with the number of people in the queue or the estimated wait time via text or voice.

5.1.2 Intelligent Customer Service Processing Scenarios The customer service system should prioritize assigning tasks to intelligent customer service processing when one of the following conditions is met.

---The customer's inquiry was either a simple, repetitive, or standardized question;

---The intelligent customer service knowledge base provides clear answers to customer inquiries, enabling it to offer solutions quickly and accurately;

---In special circumstances, the inbound call volume is large, and human customer service cannot handle it immediately.

5.1.3 Human Customer Service Processing Scenarios The customer service system should prioritize assigning tasks to human customer service when one of the following conditions is met.

---The customer explicitly requested to switch to human assistance;

---Customer inquiries are often complex, including personalized needs, vague expressions, and issues involving cross-departmental coordination;

---The customer's inquiry is infrequent, for example, the question has occurred no more than 3 times in the past year;

---The knowledge base for intelligent customer service does not provide clear answers to customer inquiries;

---Scenarios involving the personal safety and property of customers;

---The customer explicitly requested to be transferred to a human customer service representative for further processing;

---The customer service system records that this customer has visited multiple times (e.g., 3 or more times within 24 hours) and has shown significant interest in intelligent customer service. dissatisfied;

---Customers in specific age groups, such as the elderly and minors, have a lower acceptance of intelligent customer service;