DESIGNING A MULTICHLANDEL ASSISTANCE SERVICE INTEGRATED WITH AI SOLUTIONS FOR RESPONDENTS
Assistance service in Istat

Service
Specialized Contact Center - outsourcing of agents and CRM platform

Design
Project for a new assistance service - ownership of CRM platform

Service
The new system will be online

2016...
2023
2024
Features of the current service

- Outsourcing of operators and CRM platform to external supplier
- 80 surveys supported, with target enterprises and households
- Access for respondents by telephone and e-mail
- 2 levels of specialization for managing the service requests: External operators and internal Istat experts
- No automated process: operators collect all information
Volume of Service Requests in 2023

Service Requests managed
Minutes of assistance

77.2 % by phone
22.8 % by e-mail

60.4 % enterprises
38.6 % households

Service Requests - Distribution for months, 2023 year:
Categories of Service Request in 2023

84.8 percent of SR concerned access problems and general information

SR motivation - 2023 year

Access problem: 60.3%
General information: 24.5%
Variation of status of respondent: 3.8%
Mandatory and penalty: 3.0%
Data collection mode: 2.8%
Usability: 2.7%
Thematic assistance: 2.5%
Refuse: 0.4%

Only 8.8% of cases is transmitted to Istat experts

Resolution level - 2023 year

91.2% first level
8.8%
Correspondence-analysis (SR motivation and Resolution Level)

Most access problem and general information issues contain recurring tasks and are easily resolved at the first level.

Thematic and usability questions concern questionnaire variables and compilation path, so they require the intervention of Istat experts for resolution.
Benefits an weakness of current service

- **Optimize human resources** for frequent manual tasks to reduce costs and errors
- **Saving time and costs** in ticket resolution process
- Ensure **consistency and quality in communication**
- **Oversight** of all platform users
- **Improving** of the usability and functionality of **data acquisition systems**

- **Supplier turnover** (every 2-3 years):
  - long implementation time for a new software platform
  - training activities for Istat employees for the new platform
- **No automated process**:
  - an operator collects all the data
  - an operator answers even to more simple and recurring issues
- **Ambiguous classification** of motivation which does not allow a clear identification of the type of request
Outsourcing of operators and CRM platform

Phone and email interaction

Operators collect all the information

2 resolution levels: external operator (CC) and Istat

Outsourcing of operators - ownership of CRM platform

Multichannel interaction: phone, email, legal mail, web, chatbot

Automated approach collecting information

3 resolution levels: Artificial Intelligence, external operator (CC) and Istat

Assistance service towards the future
# A new classification system

<table>
<thead>
<tr>
<th>Need …</th>
<th>new classification</th>
<th>sub-classification</th>
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</table>
| help to access the portal or questionnaire? | A Accessing and navigating the questionnaire/ survey portal | Different levels of classifications for different uses (IVR, web, chatbot, phone…)
| information about regulations, privacy or obligation to respond? | B Regulatory aspects |
| information and clarification about the survey or questionnaire? | C Sample composition |
| booking an interview? | D Interview booking |
| information about an assessment and dispute report? | E Finding and dispute report |
| | F Information about the survey and questionnaire contents |
| | G Communication with Istat |
| | H Other |

- A1 Difficulties with first login/first registration
- A2 Changing registration data or proxies
- A3 Credentials
- A4 Portal usability/navigation difficulties
- A5 Accessing the questionnaire
- A6 Session expired
- A7 Server malfunction
- A8 Loading screens/system slowness
- A9 Browsers supported
- A10 Completion via smartphone
A multi-channel system
A multi-channel system
A multi-channel system
New automated process based on three-levels of assistance

Green lines represent solution paths
Black lines represent evaluation paths across multiple levels of assistance
Automated Multichannel Requests Management

AI Chatbot

Phone channel
AI: Classification for request routing
Further insights on 2023 resolution levels

In 2023 91.2% of requests are solved by external operators.

Issues at this levels concern mostly access and general information requests, easily solved by Artificial Intelligence solutions.
Estimates expected from the new three-levels process

Correspondence-analysis (SR motivation and Resolution Level)

Literature on this subject reports that AI solutions can process 50% of service recurrent requests (40% with additional conservative assumption).

Full operational savings come from AI operator with 37% of requests processed.
Thank you for your attention

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