

On the Radar: Edify's Huddle platform unites customers and teams along journeys

The vendor's UC/CC platform simplifies and unifies omnichannel engagement

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Mila D'Antonio



Summary

Catalyst

Edify's business communications service platform, Huddle, combines unified communications (UC), communications platform-as-a-service (CPaaS), and contact center (CC) support in one environment, with artificial intelligence (AI) embedded at the core. The integrated platform enables intelligent routing across the enterprise, improves decision-making by matching customers to the appropriate contact without handoffs, and extends access to enterprise databases to all employees across the enterprise regardless of location or role.

Key messages

- Edify's Huddle offers a unified platform for both agent/customer communication and team collaboration.
- Employees will gain broader access to data.
- Machine learning is built into the core for intelligent routing and analysis of real-time data.

Ovum view

Proactively engaging with customers at the right time and with the right messaging requires end-to-end interaction supported by customer journey analytics, end-to-end processes, accountability, and employee empowerment to rapidly fix customer issues as they happen, not after the fact. This means that the entire enterprise value chain must be fully integrated and supported with near real-time information. The front office, back office, and external networks should all work seamlessly toward a common goal.

Uniting employees along a single work stream around the customer is the most critical element for success in enabling an intelligent enterprise that can respond with the right action at the right time. Ovum believes intelligent, collaborative tools should sit at the heart of any digital workplace. Enabled by the cloud and positioned at the heart of customer interaction channels, these tools empower employees to follow customer journeys along their paths, share findings and collaborate with consistent content with other teams, and engage proactively and relevantly with customers.

Platforms like Edify's Huddle that offer combined UC and CC functionality will afford enterprises the ability to connect customer and employee experiences with agility and scalability. The ease, integration, and adaptability of the platform will help to increase operational efficiencies and elevate the customer experience. For example, it will improve intelligence in call routing, connect customer activity and journeys across the enterprise, improve network/desktop integration, enable multichannel voice and digitized customer engagement management, and unite teams for an empowered workforce.

Recommendations for enterprises

Why put Edify on your radar?

Ovum is expecting a convergence between UC and CC. However, as other vendors in the market are tying together these capabilities through acquisitions, Edify's competitive advantage derives from its natively built technology. Because the platform was built with the intention for the features and functionality to work together and in one place, it enables real-time interaction and connects all enterprise functions for viable omnichannel interactions. It also allows enterprises to scale the technology as they grow their customer bases and evolve their digital offerings.

With Edify, agents and customer-facing employees will gain broader access to corporate data, past customer transactional information, CRM and billing systems, and other relevant customer transaction information, which are likely to increase first-call resolution and decrease multiple agent handoffs, benefiting customers, agents, and the corporate bottom line. With machine learning embedded at the platform's core, the result will be more intelligent interaction routing and smoother multichannel contact management over the IP infrastructure.

Highlights

Enterprises share common struggles – enabling agents to access real-time customer information, outdated communications infrastructures, and disconnected employee and customer experiences. The founders of Edify built the Huddle platform with UC, CPaaS, and CC from the ground up to solve those pervasive challenges.

Co-founder Cameron Weeks said the idea behind Huddle is to combine multiple buckets of communication systems to eliminate the traditional siloed nature of business communication tools. It allows customers and agents to move among or combine channels with little friction and within the same conversation – something Weeks calls the "frictionless transfer" – they can talk, text, email, and send photos simultaneously without disconnecting. One of the most interesting tools in the platform is its omnichannel "workflows," which combine aspects such as traditional interactive voice response (IVR) and robotic process automation into a single visual design tool that requires zero code. "As we think about how overall customer strategy works, it doesn't make sense for it all to be separated. The idea for Edify was to bring all three systems (CC, UC, and CP) in one place to make it easier for companies to connect with customers and one another," he said.

Historically, agents have had to bounce between many applications to engage customers on different channels. With Edify, agents benefit from a "single pane of glass" approach, where one common interface serves as the visual dashboard, regardless of a customer's channel or device of origin, which Edify is confident will decrease handle times while also increasing first-call resolution. For example, imagine a customer sending a picture of a support issue while discussing it over the phone with an agent.

This synergy and integration also allows enterprises to track customer activity along the customer journey more easily, whether it takes place in the app or on the web. Huddle allows companies to track in-app usage, online sessions, and overall product utilization. User activity is recorded to allow agents to replay and review all activity data during the interactions. If trends emerge showing

frequently reported issues, agents or bots can proactively engage with customers, handling and solving the issue before it crosses the level of frustration that drives the customer to call support.

Huddle can also automatically send post-interaction surveys to gain customer feedback through multiple channels such as voice, SMS, or email.

Machine learning is built into the platform's core

Weeks said the philosophy he and co-founder Bracken Fields share focuses on the use of machine learning to empower agents and employees, not remove them from the conversation. Therefore, they embedded machine learning at the core of the platform to identify opportunities and alert the right people when necessary. "We designed this to work alongside the team, there are major opportunities for AI in both customer and agent-facing communications," Weeks said.

Internally known as Hammond, this AI-powered bot serves as the intelligence engine of Edify's Huddle platform. It uses natural language understanding (NLU) and intelligent, conversational-based routing to comprehend text or spoken language. Hammond allows companies to deliver chatbot-based self-service abilities, while leveraging sentiment analysis to move conversations to a live agent when and/or if needed. This allows customers to get the needed information faster, but also protects against elevated potential frustration when the bot is not able to help.

Huddle unites teams along the customer journey

While Huddle unifies external communications channels and provides a "single pane of glass" for agents, it also unites teams beyond the contact center via one intelligent interface. Team dashboards are customizable per user or per department and managers can set goals for their teams, measure individual user performance, view team activity, and analyze outcomes. Edify's visual design tool creates custom workflows and unifies all conversation routing plans into one visual document. Automatic versioning control allows for easy review and rollback to previous versions.

Hammond finds coaching opportunities and recommends training modules based on agents' real-time activity. They then integrate directly into earning badges that are featured on an agent's internal dashboard profile.

Managers can also access the data from one place to manage staffing levels and gauge performance. Individual score cards are attached to reports for coaching and they can notate and discuss their findings with the respective agent or with their team during coaching opportunities. Managers and team leads can monitor and isolate interactions as they happen, providing immediate feedback and coaching to individuals or the entire team. Hammond even recommends training modules related to areas where users can improve.

Background

Edify Labs, Inc. is a global communications platform with the goal of strengthening connections with customers and across teams, and fixing CC communications (the company has no relationship with the previous IVR company, also named Edify). Edify was co-founded by Cameron Weeks and Bracken Fields, who created their first VoIP company in 2007, and grew it into a global customer service platform. Their goal of taking business communications technology to the next level led to the realization that they need to build a better solution from the ground up.

Current position

Edify's headquarters are located in Carmel, Indiana, and the company maintains an office in Santa Monica, California. On the platform side, Edify is deployed equally on both Amazon Web Services and Google Compute Cloud, it operates in 12 regions as a single unified cloud, and each region maintains multiple data centers.

The vendor's telco partnerships include agreements with all major telcos throughout the US, Europe, and Asia. It integrates with the agent desktops of Salesforce and Zendesk CRM systems. The company offers a two-bucket pricing model – the first model is a usage-based model geared toward traditional agents, and the second is for more traditional users of UC products. The first five users are free for the lifetime of the technology. The agent model is usage based and is \$7 per day, per user, after the first five. The UC model is a more traditional approach that charges \$10 per user, per month. Edify also offers 100% of the entire platform service-level agreement (SLA) and pays back up to 10 times the contract value if any downtime should occur. Ovum believes the usage-based pricing model and free usage for the first five users will realize greater appeal in the mid-sized segments of the market.

The company currently focuses on the healthcare, financial services, and technologies categories. It has already completed HIPPA requirements for healthcare and other regulatory compliance for financial services.

Data sheet

Key facts

Table 1: Data sheet: Edify

Product name	Huddle	Product classification	Business communications and service
Version number	n/a	Release date	June 2019
Industries covered	Healthcare, finance, and technology	Geographies covered	Global
Relevant company sizes	n/a	Licensing options	SaaS based
URL	www.edify.cx	Routes to market	Direct and channel
Company headquarters	Indianapolis, IN	Number of employees	n/a

Source: Ovum

Appendix

On the Radar

On the Radar is a series of research notes about vendors bringing innovative ideas, products, or business models to their markets. Although On the Radar vendors may not be ready for prime time, they bear watching for their potential impact on markets and could be suitable for certain enterprise and public sector IT organizations.

Author

Mila D'Antonio, Principal Analyst, Customer Engagement

mila.dantonio@ovum.com

Ovum Consulting

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askananalyst@ovum.com

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