

# Contact Center Success In The Automation Age

2019 CCW Market Study

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# CCW Digital Market Study: Contact Center Success In The Automation Age

When the customer experience landscape changes, great contact centers change with it. Rather than fixating on what once was, they align their operation with what customers want right now – and will want in the months and years ahead.

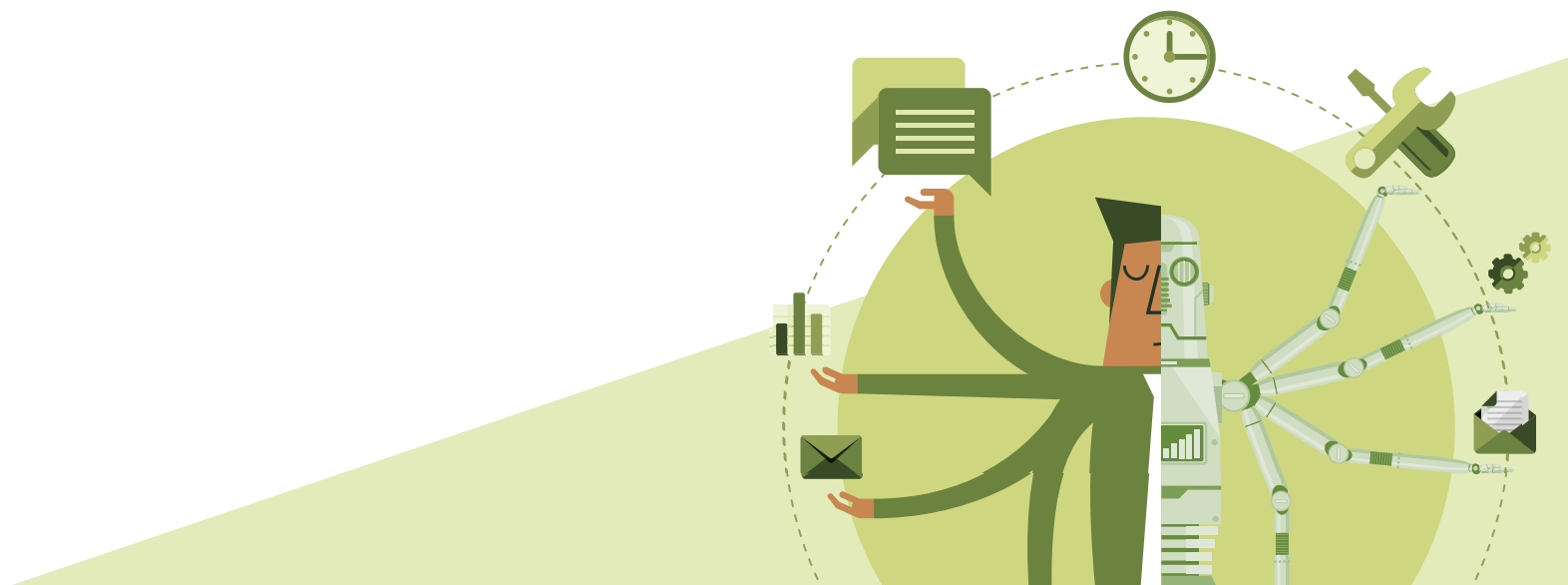
Earlier this century, the contact center objective changed from “supporting customers” into “connecting with customers.” Upon embracing the change, organizations recognized the inadequacy of “efficiency metrics.” They shifted attention from average handle time and call count to factors like customer satisfaction and loyalty. They, more importantly, adjusted their operational strategies to focus on connections rather than deflections.

Due to the rise of automation and the realization of the digital transformation, the customer contact landscape is undergoing another major evolution. What does this mean for contact center performance management? This market study provides answers.

Citing research from a comprehensive CCW Digital survey, it first reveals how organizations are redefining their customer contact objectives in the automation age. It subsequently details the factors inhibiting those objectives, the steps organizations will take to overcome the challenges, the most important signs of great performance, the top focuses for digital engagement, and the most useful metrics for scoring the contact center.

Far from a mere “research report,” the Market Study concludes with a thorough “practicality guide” detailing case studies for optimizing automation, improving digital capabilities, and redefining contact performance management.

Do not watch the ascension of automation and the evolution of digital engagement from afar. Let this report help you turn the new customer experience normal into a springboard for unprecedented results.



## Key Findings

- 1 Today's contact centers have three key objectives for performance: improve self-service and digital engagement, eliminate friction and frustration, and empower agents to make more meaningful connections.
- 2 Disconnected technology makes for the biggest contact center performance challenge. 80% say their agents typically have to access multiple systems when supporting customers.
- 3 Additional performance bottlenecks include agents spending too much time on transactional tasks and an inability to "recognize" customers as they transition from digital to voice.
- 4 When writing the book on the state of the contact center in 2019, pundits will be wise to evaluate self-service. Increasing self-service usage represents the #1 performance goal for 2019.
- 5 Other key performance goals include reducing customer effort, increasing first contact resolution, increasing digital channel usage, reducing agent frustration, and improving the knowledge base.
- 6 Organizations are generally maintaining or increasing their contact center budgets. A substantial 50%, as an example, increased their digital spend this year. Only 4% reduced their digital spend.
- 7 Organizations value the digital transformation, but they are not blind to the challenges. Key concerns include the absence of a 360-degree customer view, lingering concerns about resources, and properly securing customer data.
- 8 To evaluate performance in the automation age, organizations will most notably consider effort level, ROI of agent activity, and the ability to make "connections" with customers.
- 9 Emerging metrics include "agent productivity rate," "proactive resolution rate," and "customer effort score."



## Demographics & Methodology

To collect data for the Market Study on Contact Center Success in the Automation Age, CCW Digital surveyed customer experience, contact center, marketing, customer care, IT, and operations professionals in January and February 2019.

Example respondent job titles include customer service director, senior vice president of customer experience, customer care manager, senior manager of customer experience, assistant vice president of contact centers, global customer experience manager, vice president of marketing, vice president of banking operations, vice president of customer success, senior director of customer support, and chief experience officer.

The respondent pool encompasses a wide range of organizations, including a substantial number of enterprise-level organizations. More than half of respondents say they employ over 100 contact center agents, and 63% confirm they have multiple contact center sites.

## About The Author



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Brian Cantor is the principal analyst and director for CCW Digital, the global online community and research hub for customer contact professionals. In his role, Brian leads all customer experience, contact center, technology and employee engagement research initiatives for CCW Digital's series of reports. CCW Digital's articles, special reports, commentaries, infographics, executive interviews, webinars and online events reach a community of over 150,000.

A passionate advocate for customer centricity, Brian regularly speaks on major CX conference agendas. He also advises organizations on customer experience and business development strategies.





## Key Contact Center Priorities: A Refresher

In the simplest sense, an inquiry into contact center performance is an inquiry into whether an organization is achieving its customer contact goals and objectives. Through its strategies, investments, initiatives, policies, processes, and interactions, a successful contact center helps the organization realize its ultimate vision.

A firm understanding of that vision, consequently, represents the foundation of a great contact center performance strategy. What does an organization believe are the tenets of a great customer contact function? What are the organization's high-level priorities?

CCW Digital's recent Market Study on the Future of the Contact Center provided the answers.

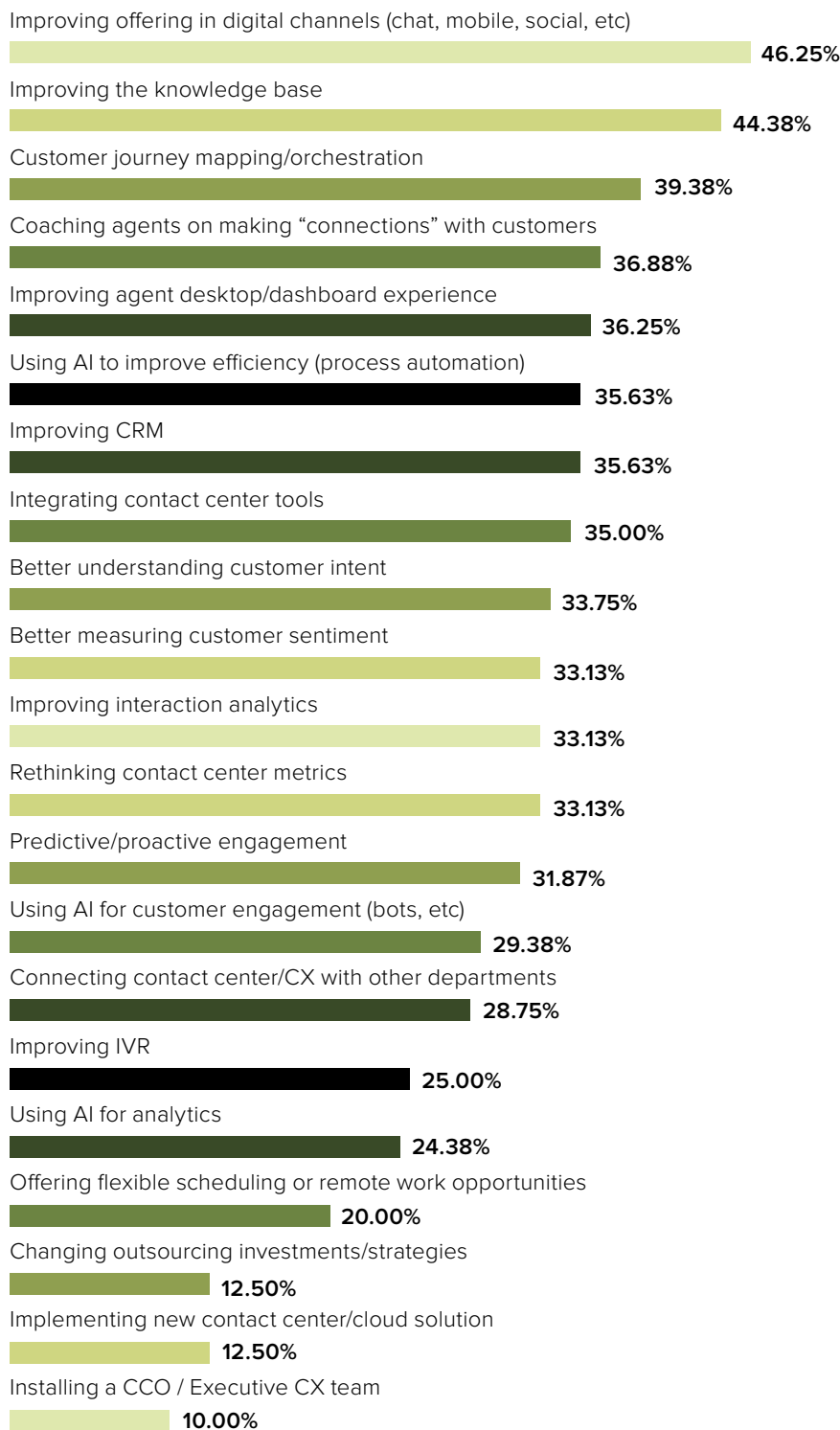
Organizations' "vision" for the future of the contact center most notably involves providing **easy access to live agents, using artificial intelligence to complement rather than replace agents, aligning all contact**

**channels and engagement functions, leveraging self-service for transactional matters and agents for complex ones, and emphasizing speedy interactions.**

Top executive priorities include **increasing digital capabilities, improving the knowledge base, employing customer journey mapping and orchestration, and better automating rote processes.**

Collectively, the vision and priorities provide a clear performance framework for today's customer contact functions.

## Which of the following initiatives will be PRIORITIES for your contact center/CX team in 2019?







## A Challenging Status Quo

The aforementioned priorities list more closely resembles an instruction manual than a dream board. Rather than an idealistic statement of what contact center leaders want to achieve, it is a reminder to begin by building the appropriate framework – and conquering the lingering challenges.

The reality is that a wide gap typically exists between what contact center leaders want to achieve and what they are actually delivering. While psychological factors like organizational inertia may play a role, much of the gap stems from tangible and significant limitations in the customer contact operation. The contact center simply cannot perform the tasks it needs to accomplish, which in turn prevents the organization from achieving the goals it wants to achieve.

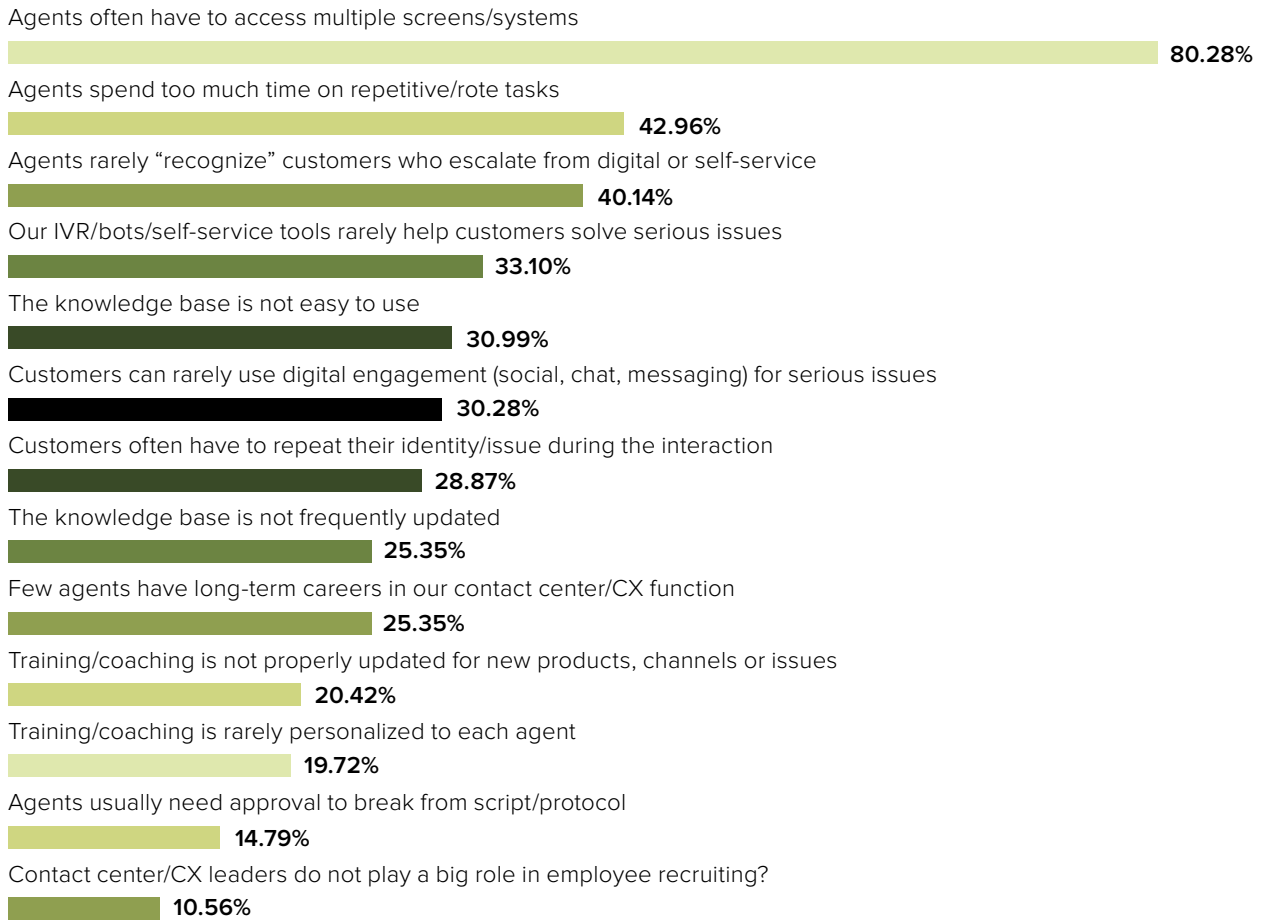
One of the most universal – and crippling – challenges involves the day-to-day agent experience. A whopping 80% of organizations confirm that **agents typically have to access multiple screens and systems when engaging with customers.**

An encapsulation of the “silo,” “misalignment,” “friction,” and “fragmentation” complaints that have become so cliché in the business world, this agent experience issue proves immensely debilitating for today’s customer contact functions. If agents cannot easily access relevant information, they obviously cannot deliver fast, convenient, accurate experiences for customers.

They also cannot *connect* with customers. Agents who fumble through multiple screens cannot pay sufficient attention to the customers with whom they are interacting. They, moreover, cannot readily access the insights they need to *make* meaningful connections.



## Which of the following issues are true for your customer contact/CX function?



Not simply a productivity and customer experience concern, a frustrating agent experience also has damaging long-term ramifications for employee satisfaction.

Other key contact center challenges include agents **spending too much time on rote tasks** (43%), **agents struggling to “recognize” customers who escalate from digital** (40%), **ineffective self-service tools** (33%), and **difficult knowledge bases** (31%).

Like the fragmentation issue, these challenges jointly undermine the customer and agent experiences. They

additionally provide context for the three core priorities: improving digital and self-service platforms, empowering agents to make connections, and reducing effort.

Many contact centers are not offering customers robust digital or self-service options. They are also failing to provide agents with necessary context for accurately and cordially resolving issues. They are consequently putting low ceilings on customer satisfaction, employee engagement, and operational productivity.



## Establishing Performance Goals

Because every aspect of the contact center impacts the customer experience, savvy organizations will doubtfully *decline* opportunities for improvement.

Opting not to reject an opportunity is not, however, the same as enthusiastically pursuing it.

As organizations consider their clearest vision for the contact center, their most pivotal strategic priorities, and their most crippling challenges, they will make choices about the particular forms of improvement to pursue. These areas will consume the lion's share of their attention and resources. Performance in these areas will, consequently, determine whether the contact center is successful.

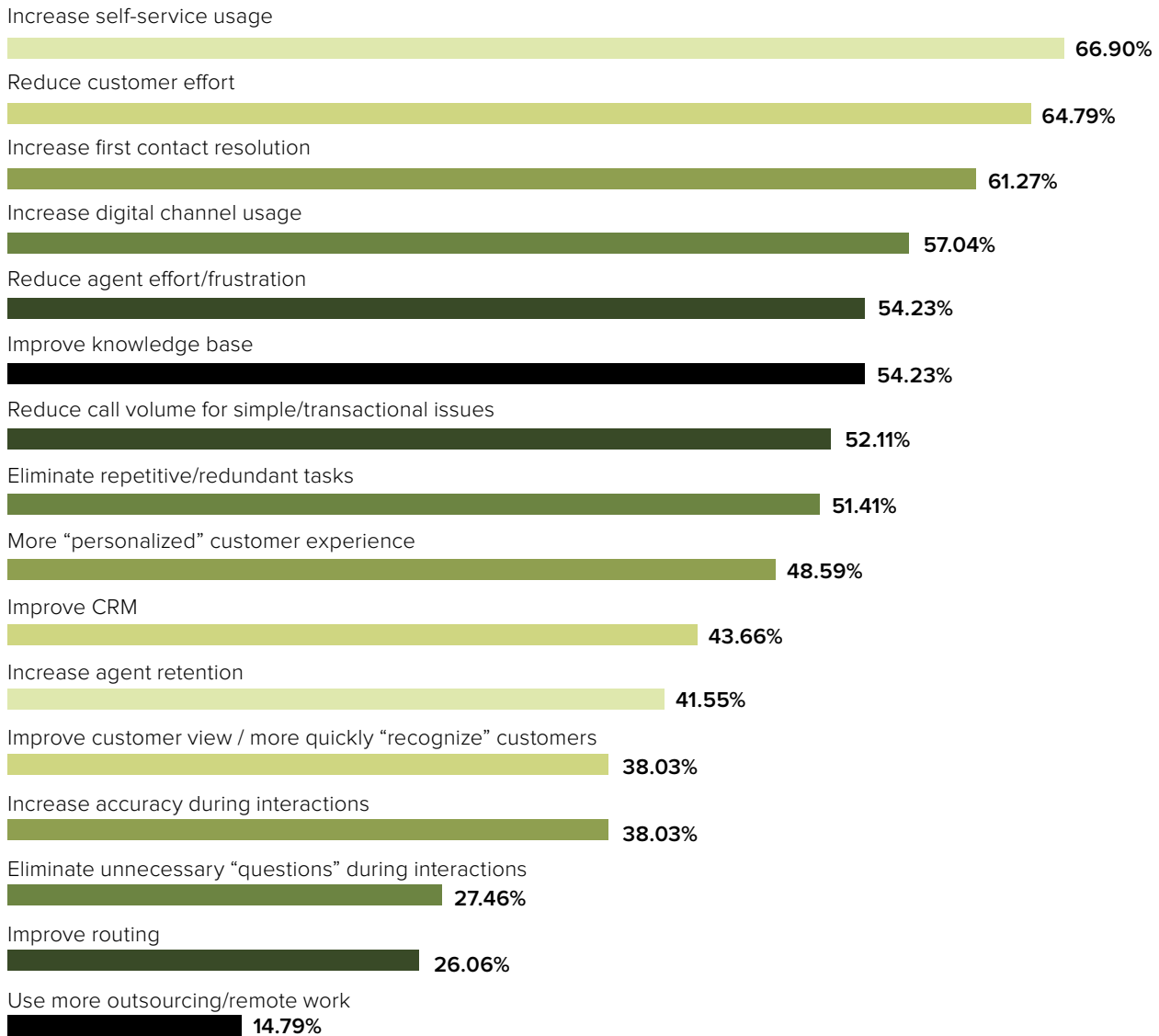
When the book is written on contact center strategy in 2019, self-service usage will play a pivotal role in grading success.

Nearly 67% identify **increasing self-service usage** as a serious performance priority, making it the most popular focus for today's contact centers.

An effective self-service platform is efficient for the organization and convenient for the customer. Those benefits, alone, explain why increasing self-service represents such a widespread priority.

An increase in self-service usage also yields broader performance benefits. By handling a greater percentage of transactional tasks, self-service platforms empower agents to focus more intently on higher-value engagement. More robust self-service tools will also capture more actionable information from customers and can thus provide agents with more context in the event customers do need to escalate.

## Which represent serious performance priorities for your organization in 2019?



To put it simply, when the self-service platform is effective, customers and agents meaningfully benefit.

A serious priority for 65% of organizations, **reducing customer effort** represents the #2 performance goal.

Breaking from a recent trend, effort did not rank as a top executive priority in CCW Digital’s Future of the Contact Center Market Study. This new survey data, however, confirms its ongoing role as a key performance benchmark. Reducing effort is no longer the hottest conversation topic for executives, but it remains a

fundamental tenet of contact center management. A difficult customer experience reflects unequivocally poorly on the contact center.

In CCW Digital’s annual consumer preferences survey, actual customers confirmed **first contact resolution** as the leading sign of a great experience. Aiming to honor that demand, 61% of contact centers treat FCR as a serious priority. It is the #3 performance goal.

FCR is a simultaneous reflection of the experience the organization is offering *and* the customer contact function it is operating.

It, after all, often takes a quick, valuable, sustainable resolution to satisfy customers. If the organization cannot deliver on that cornerstone demand, the bells-and-whistles of its customer experience will largely be for naught.

FCR is, of course, the product of more than mere will. It takes robust knowledge bases, powerful desktop interfaces, actionable customer intelligence, customer-centric processes, and productive training to ensure agents can successfully resolve a customer's issue during the initial interaction. FCR therefore represents a simple way to grade the various elements of the operation.

FCR is also taking on renewed importance in the age of digital engagement. If organizations are serious about creating more robust digital and self-service options, they will commit to increasing resolution rates within these channels.

They will also reconsider the very definition of FCR. To achieve "first contact resolution," does the organization have to completely solve the problem in the initial channel? Or, are escalations permissible (as long as the solution comes during the initial "sitting")?

Organizations are resoundingly clear about plans to increase digital capabilities. To evaluate their efforts, they will consider customer usage.

Just over 57% of organizations view **digital channel utilization** as a serious priority, making it the #4 performance goal.

By specifically focusing on utilization, organizations establish accountability for their digital channels. They will provide meaningful engagement and support – not mere "communication" – in these increasingly popular media.

As customers feel more comfortable and trusting in these channels, they will more frequently use them. A sign of customer centricity, this endeavor will help reduce customer effort and reduce costly inbound call volume. When customers and agents do speak in the voice channel, it will be for high-value work that uniquely benefits from such a conversation.

Priorities for 54% of organizations, **reducing agent effort** and **improving the knowledge base** tie as the #5 performance goal.

As problematic knowledge bases represent a typically great source of agent effort, the goals are closely related. Improving the knowledge base *will* create more productive, less frustrated agents.

Each objective nonetheless runs deeper. The knowledge base will also feed into self-service tools; with organizations aiming to increase self-service usage, a strong knowledge platform becomes particularly important.

The goal of reducing agent effort, meanwhile, will account for all systems – communication tools, dashboards, CRM solutions, routing platforms, and more – that impact an agent's workflow. It will also include providing simpler, more empowering processes and more robust, more personalized training. It reminds contact center leaders that they must perform for their agents before agents can perform for their customers.





## Considering Budgets

Contact center performance is not a game of “who can spend the most.” Breaking the bank is not a prerequisite for success.

As some organizations squander significant percentages of their budgets on misguided initiatives, convoluted processes and ineffective technologies, a case can be made that a great contact center strategy actually involves *saving* money.

The customer contact budget nonetheless carries symbolic importance. By continuing to allocate meaningful resources for the contact center, an organization confirms that it values the function. Further, it sends the message that it is not simply looking to streamline processes; it wants to *invest* in creating more value.

Based on their budgetary plans, organizations are definitely affirming the importance of the digital transformation.

Nearly 50% of organizations increased their **digital engagement budgets** in 2019, making it the most common improvement area. An additional 46% of organizations, meanwhile, say that they maintained their existing budgets in 2019. A mere 4% confirm reductions in allocation.

Other areas commanding substantial budgetary support include **voice of the customer** (49% increasing, 46% maintaining) and **contact center technology** (49% increasing, 44% maintaining).

While budgetary trends may reveal specific interest in digital engagement, customer intelligence and technology, they do not confirm a noteworthy *lack* of support for any particular initiative.

## How did your budget for the following change this year?

Decrease No Change Increase

Salary for agents/CX employees



Outsourcing / remote work



CX/contact center technology



Digital engagement



AI for customers (bots, self-service, etc)



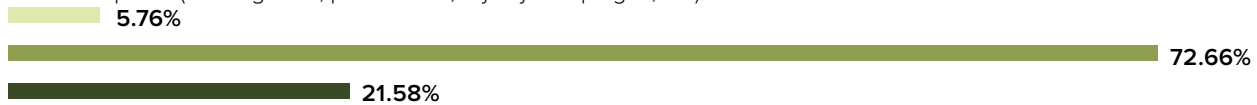
Internal AI (process automation, knowledge management, etc)



Voice of the customer (surveys, analytics, etc)



Customer perks (make-goods, promotions, loyalty campaigns, etc)



**Outsourcing and remote investments** may technically rank as the most common reduction area, but only 11% actually decreased budgets for those initiatives. That figure pales in comparison to the 20% who are *increasing* their outsourcing investments and 69% who are maintaining existing allocations.

To put it simply, today's contact centers are not immune from the budgetary challenge. They will still face

budgetary ceilings, and they will still endure the burden of "making the most" of their limited resources.

They are not, however, enduring marked *decreases* in budgets. Their organizations are generally standing behind the contact center, which means functional leaders have an opportunity to elevate their operations. They have an opportunity to perform.



## Let's Get Digital

Increasing digital capabilities is the #1 executive priority for 2019. Improving self-service and digital channel usage are top performance priorities, and 96% of organizations are either increasing or maintaining their digital engagement budgets.

To put it simply, the digital transformation is a paramount focus for today's contact centers. They want to create more capable, more accessible digital channels.

They do, however, anticipate challenges on the road to a more robust digital engagement experience.

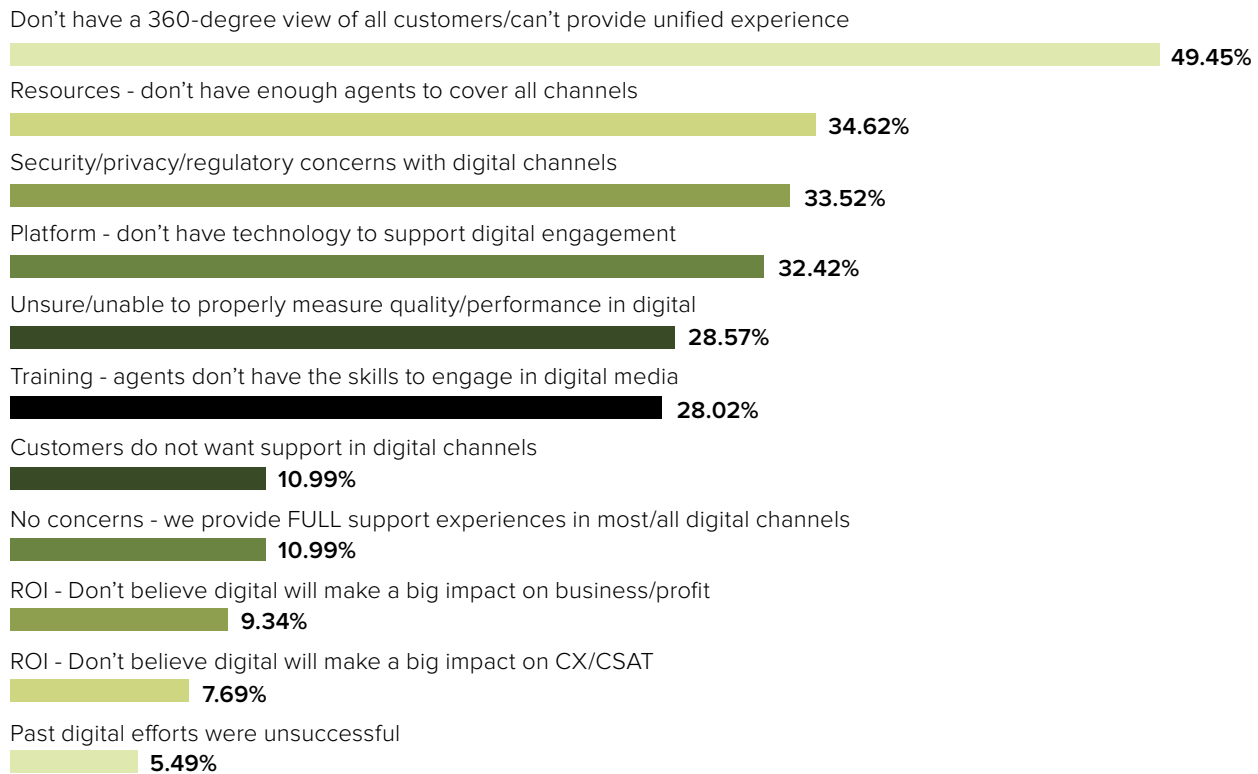
A pivotal concern for 49% of organizations, the biggest challenge involves **the lack of a 360-degree view of all customers**. Organizations and their agents are already feeling the hurt of disconnected systems and insufficient data about customers and their issues. Adding more channels to the mix will only exacerbate this challenge. Customers will endure more effort and frustration while moving between channels, while agents will have an even more difficult time acquiring the necessary context for each interaction.

Other digital engagement challenges include **concerns about resources** (35%), **data security and compliance** (34%), **platform** (32%), and **performance measurement** (29%).

Fewer than half of organizations are actively stressing about these challenges, which means the majority of contact centers believe they are ready to make the digital transformation. They are ready to pursue their biggest priority. Still, the concerns are widespread *enough* to question the overall community's propensity for success.

On the one hand, organizations are directly addressing the resource concern by maintaining or increasing their digital engagement budgets. On the other hand, many organizations lack expertise on how best to allocate digital resources. Fewer than 50% are providing a complete engagement in experience in any digital

## Which are your biggest concerns about providing customer support in digital channels?



channel (let alone all of them), which means they lack clear insight into likely workflow needs.

A conversation topic for the broader contact center community, customer data carries particular relevance in a digital context. As some media lack the security attributes taken for granted in the voice channel, protecting customer data and privacy represents a clear challenge. The new, uncharted nature of digital channels also creates ambiguity about regulatory compliance. Organizations are right to wonder whether certain interactions are permissible in SMS or social media.

Security also carries significant ramifications for contact center performance. Inefficient, ineffective authentication practices create undue effort for customers and agents.

Creating an omnichannel experience requires more than a 360-degree view of the customer; it also requires a singular platform for seamlessly accessing

data and communicating with customers. Roughly one-third of organizations worry that they do not have the appropriate engagement tool.

An omnichannel experience involves *consistency* rather than uniformity across all channels. While customers should feel as if they are speaking to the same business with the same commitment to resolution, they will obviously not encounter the exact same experience in all channels. Chat conversations, after all, are fundamentally different than emails. Email interactions are fundamentally different than phone calls.

This reality creates a performance measurement challenge; it requires organizations to select metrics that simultaneously capture the nuance of each channel and the overarching commitment to customer centricity.

An additional concern involves volume distribution. As conversations shift from voice to chat or SMS, what will be the net impact on the operation?





## Call Center Metrics Are Dead; Long Live Call Center Metrics

By virtue of their ubiquity, long-time contact center metrics provide organizations with a bragging right. Organizations and employees can quickly demonstrate their worth by trumpeting strong CSAT levels, Average Handle Times, or First Contact Resolution rates.

Not simply useful for pride purposes, these conventional metrics remain immensely relevant for organizations that are ultimately aiming to efficiently connect with customers. It *matters* when an organization greatly increases (or decreases) customer advocacy. It *matters* when an organization improves its retention rate.

The downside to these “outcome” metrics is their breadth. An increasing CSAT may paint a generally favorable picture of the contact center, but it does not precisely articulate which parts of the operation are moving the needle. It, accordingly, does not firmly reveal what the organization can do to maintain – and even grow – its success.

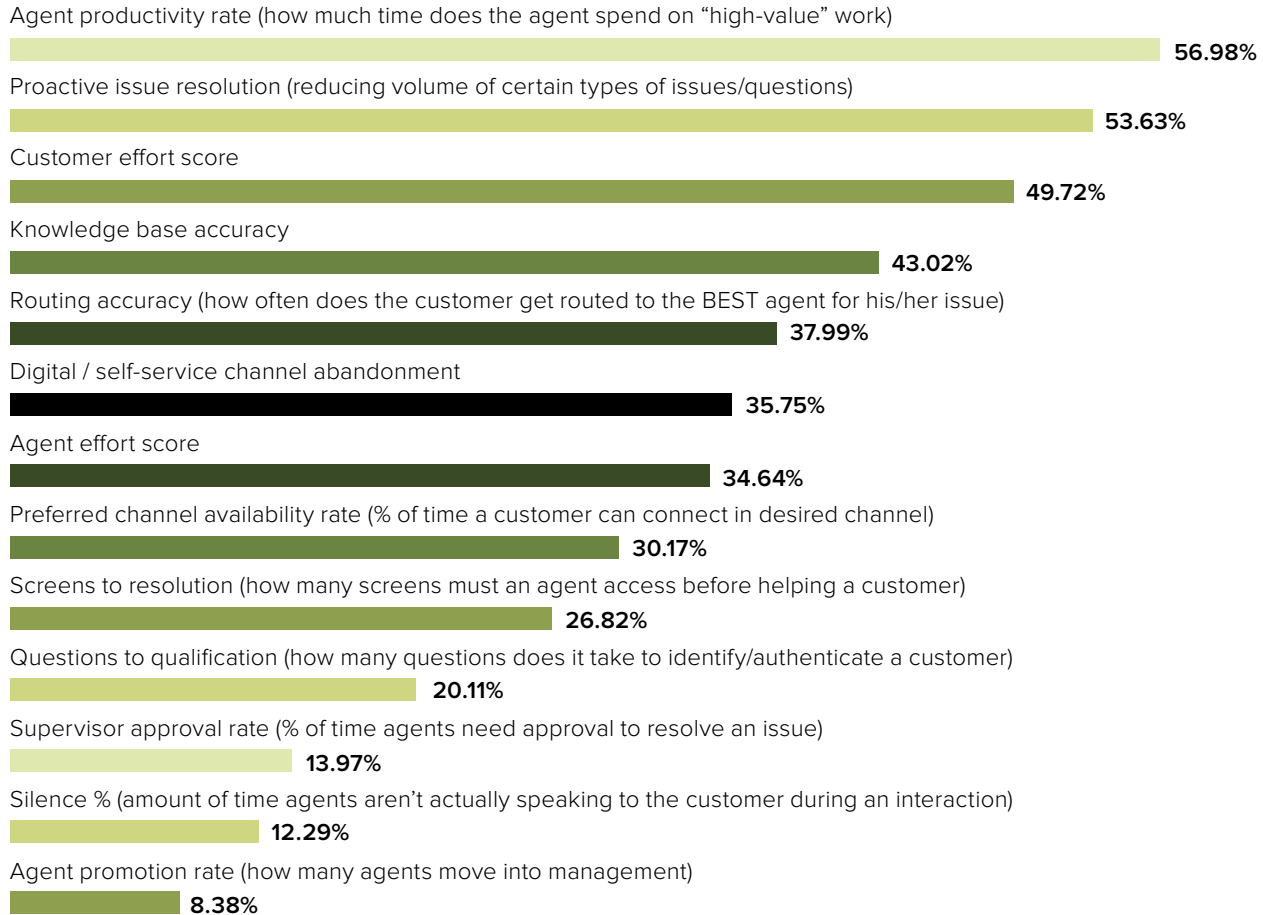
Since many of their performance priorities involve specific, day-to-day components of the contact center

operation, organizations require a new class of metrics. They require alternative metrics that better reveal whether the framework they are creating supports the outcomes they are desiring.

The most appealing “alternative” metric is “**agent productivity rate.**” A whopping 57% of organizations believe it is important to measure how much time agents spend on high-value work.

The enthusiasm for “agent productivity rate” perfectly aligns with how organizations are approaching performance in the automation age. By leveraging automation and eliminating frustrating processes and systems, organizations aim to minimize the time agents spend on rote, repetitive, transactional matters and maximize their availability for high-value engagement.

## Which of the following metrics/scores/concepts are (or will be) important when evaluating the success of your customer contact/CX function?



Agent productivity scores this effort, thus allowing the organization to assess factors like return on automation investments, process efficiency, and agent frustration.

Other popular “alternative” metrics include “**proactive issue resolution**” (53%), “**customer effort score**”

(49%), “**knowledge base accuracy**” (43%), and “**routing accuracy**” (38%).

Collectively, these metrics robustly address key aspects of the contact center operation.



### Effort Level:

Proactive issue resolution, more accurate routing, and more accurate knowledge bases reduce customer effort. Success in these three areas will yield a lower effort score, which will in turn contribute to factors like customer satisfaction, customer retention, and cost per interaction.

 Agent ROI:

Organizations want their agents to focus on more productive tasks; these metrics reveal whether they are fostering that proactivity. By proactively resolving simple matters, they allow agents to focus on more complex interactions. By routing customers to the best agent, organizations allow employees to more thoroughly focus on the task at hand. Improving the knowledge base helps agents spend less time “searching” and more time “connecting.” Holistic efforts to reduce effort will minimize customer frustration, thus yielding more productive conversations.

 Maximizing connections:

The metrics, ultimately, speak to the organization’s success in providing the right information to the customer at the right moment. In some cases, that effort will come in the form of proactive outreach. In others, it will entail quickly routing the customer to the best available agent – in the most convenient possible channel. It will always involve providing accurate, intuitive information.

Less appealing “alternative” metrics include **agent promotion rate** (8%), **silence percentage** (12%), and **supervisor approval rate** (14%).

Organizations are doubtfully *dismissing* the former two factors. Promotion rate addresses long-term career trajectories, which should be a natural concern for a function infamous for its high attrition. As “silence” occurs when the agent is *performing tasks* rather than *supporting customers*, it should be a logical concern for organizations emphasizing greater agent productivity.

The lack of support, more likely, stems from a lack of urgency around optimizing these factors. Agent promotion is an admirable long-term goal, but simply

addressing day-to-day sources of agent frustration and inefficiency will lead to more immediate improvements in performance. This reduction of agent effort will likely result in greater agent longevity anyway.

Similarly, why prioritize measuring “silence” over eliminating the inefficient processes, training curricula, and technologies that create the silence?

As only 15% of organizations say agents typically need approval to break from scripts, that form of empowerment is not a major challenge for today’s contact centers. Leaders thus see little reason to emphasize a “supervisor approval rate” metric.



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## 4 Ways To Raise The Bar On Contact Center Performance

When it comes to discussing the importance of the customer experience, contact center leaders generally have their heads in the clouds. When it comes to actually managing the performance of their contact centers, these leaders typically set the bar too low.

It is time to escape this reality. It is time to build a contact center operation that truly rises to the highest customer experience standard.

This ideal customer contact environment does not simply address customer complaints or process transactions. It instead fosters meaningful, nuanced, personalized connections with customers without compromising internal efficiency. It, in fact, recognizes that *efficient* operations and *effective* customer experiences often go hand-in-hand.

The customer contact community spent decades working to escape the “cost center” stigma. It built many cases in support of firmer buy-in from the executive rank. This brief will ensure those ambitions and efforts were worthwhile.

It will reveal factors that undermine contact center performance, before sharing strategies for reaching new operational heights. It will close with case examples of organizations leveraging their contact centers to achieve legitimate customer centricity.

## Contact Center Performance: The Common Mistakes

In prioritizing the digital transformation, committing to reducing customer effort, demanding better first contact resolution, and acknowledging key sources of agent frustration, customer contact leaders demonstrate an awareness of the landscape. They know what opportunities exist, and they recognize where they are struggling.

Many, unfortunately, make mistakes when trying to approach these issues. These common mistakes place bottlenecks on contact center performance.

### Ignoring Issue Context

Different customers want different things. Different issues warrant different things. Dismissing this reality, many organizations aim to deliver a “one size fits all” experience.

They may train on process and product, but they rarely prepare agents to adapt to specific customers. They focus on broad metrics like average handle time and first contact resolution rather than diving deep into customer intent and sentiment. They deploy stock security measures, forgetting that some issues warrant higher levels of authentication and others do not require any additional questioning.

In addition to yielding generic, impersonal experiences for customers, the “one size fits all” approach is bad from an operational standpoint. If the organization does not understand the specific context and needs behind each interaction, it cannot optimally allocate its resources. “High-value” agents will end up spending time on transactional interactions, and vice versa, creating costly inefficiencies.

## Neglecting The Journey

“What happens if a customer is on an online chat and is told that they can solve a problem by contacting this department at some phone number and they will take care of it?” wonders Matthew Schuster of Eastern Account System. “The customer then rates that chat as a great experience. Now they call that other department and are told that they can’t help them and that the information they received from the chat was incorrect. The agent on that call may have been nice and empathetic, but now the customer is less than thrilled overall.”

For all the talk about customer journeys and the omnichannel revolution, customer contact management tends to be very fragmented. Organizations focus on whether specific touch points or processes technically performed their job, without considering how they fit into – and affect – the overall journey.

In Schuster’s example, the contact center may blame the voice agent for the bad experience even though the real culprit is the ineffective chat channel that could neither solve the problem nor communicate accurate information. The organization, in turn, gets an inaccurate view of contact center performance and the wrong idea about how to drive improvement. Performance suffers.

### Dismissing The Importance of Technology, Frontline Agents

“Digital is for low-touch, voice is for high-touch.” “Frontline agents are for handling basic support issues; specialists are for complex matters.” Common within the customer contact space, these statements paint a reductive portrait







## Contact Center Performance: The Improvement Opportunities

The bad news: the common contact center mistakes are creating frustration, inefficiency and dissatisfaction.

The good news: customer contact leaders can easily avoid these mistakes. More importantly, they can take steps to actually derive new value from their operation. They will turn the idea of a “customer-centric contact center” from an idealistic pipe dream into a statement of unexaggerated reality.

### Establish A *Versatile* Contact Center Vision

A clear vision is the key to raising customer contact performance standard. When an organization establishes clear goals for the contact center, it will optimize the entire customer experience journey, make better technology decisions, select better partners, and choose more effective metrics.

While this vision needs to be cohesive and clear, it cannot be impossibly rigid. The marketplace is constantly changing, and new channels and technologies are constantly emerging. Individual customers, moreover, have different preferences for different interactions.

The best vision is therefore predicated on versatility. The organization maintains a broad sense of what it wants to achieve – greater customer loyalty, as an example – and then empowers its stakeholders to adapt to specific scenarios. They are just as capable of serving customers who want a speedy interaction as they are those who want deep conversations and detailed guidance.

### Develop A Robust Voice of The Customer Strategy

“A customer may interact with your company multiple times in a day, week, month or year,” notes Schuster. “How do you capture that total customer journey?”



Context of the entire journey is a prerequisite for understanding customer intent, identifying performance gaps, and tailoring the experience. A robust, omnichannel approach to the voice of the customer empowers organizations to acquire this insight.

Through a combination of strategic surveys, interaction analytics, consumption analysis, and social media monitoring, organizations can gain a complete, journey-wide view of their experiences. They will understand which aspects of the journey create the most customer frustration. They will also understand how contact center performance and customer sentiment differ across the spectrum of channels and interaction types.

To jumpstart or strengthen the analysis, organizations can partner with organizations who have existing voice of the customer tools or access to industry-wide data for benchmarking purposes.

## Emphasize The Right Kind of Specialization

In the interest of reducing customer effort and maximizing first contact resolution, savvy contact centers try not to be restrictive about “who can handle what.” They do not necessarily subscribe to a traditional view of specialization.

They do, however, understand the importance of tailoring the customer experience to specific needs.

They recognize and accommodate inherent differences in channels. They prepare agents and systems to adapt to specific issue context and specific customer preference. They identify opportunities in which “upsell” efforts make particular sense. They exercise best practices for security, privacy and compliance in suitable situations.

Not simply a determinant in how they interact with customers, this “specialization” also applies to how they select technologies and partners. Finance or healthcare companies, as an example, will select chatbot and SMS technologies that meet their unique regulatory needs.

Companies will meanwhile select outsourcers based on specific expertise and experience. Rather than simply contracting based on headcount, they will consider factors like industry experience, channel support (hiring an outsourced social media team, as an example), and preparation for complexity.

## Build For Empowerment

Per CCW Digital’s research, “improving digital capabilities” is the #1 priority for 2019. In the interest of better honoring customer preference and improving efficiency, organizations will make good on that commitment. They will additionally deploy bots that solve real, specific tasks.

Through stronger training, they will also empower frontline agents to handle a greater array of issues. When frontline agents can handle complex issues and tailor their support to specific customer needs, they will drive increases in CSAT and FCR.

Not simply about strengthening the frontline, empowerment also involves ensuring Tier-3 experts have proper customer service skills. These experts should not simply have knowledge; they should be able to communicate it in a customer-friendly manner.

The idea of empowering the frontline may seem intimidating to leadership, but there are ways to manage the situation. For starters, building a firm security protocol will ensure the frontline agent can win the customer’s trust earlier in the call.

Savvy organizations, additionally, build a transparent contact center framework. They ensure leaders have real-time insight into how agents (whether in-house or frontline) are performing.

“Our technologies allow our clients to have complete transparency into our center,” says Schuster regarding his firm’s commitment to transparency. “In addition, we can connect to any platform or tool they are using to measure their customers’ experience.”



## Turning Great Ideas Into Real Value

On paper, it is hard to argue that establishing a clear contact center vision, focusing on specialization, better harnessing the power of customer intelligence and fostering operational empowerment will remedy lingering contact center issues.

Does this theoretically sound approach hold up in practice? The answer is a resounding yes.

By partnering with Eastern Accounts to adopt some or all of the four steps, organizations have radically improved their customer contact operations. They have not simply set a higher bar for the customer

experience but made good on their promise to create more value for customers, employees, executives and other stakeholders.

## About Eastern Accounts

Eastern Account System is a full service premier BPO organization that offers omnichannel contact solutions for companies of all sizes in many industries. Utilizing cutting edge technologies paired with highly trained employees, Eastern helps achieve desired results while providing world class customer experiences for their clients. With vast experience in customer care, collections, billing, and sales, Eastern will design a customer contact solution for your organization. Reach out to us today at [info@easternaccounts.com](mailto:info@easternaccounts.com) to schedule a consultation.

## Challenge

A leading telecommunications company is looking to increase contact with customers that are in jeopardy of going delinquent and potentially having services shut off.

In the past, the company simply blanketed these customers with phone calls over a set period of time. However, as more customers prefer to communicate in different ways, there is a need to design a more efficient, complete contact solution.

## Solution

Using Eastern, the company was able to design a more efficient and customer friendly way of contacting its customers. Eastern uses a combination of TCPA-compliant phone dialing and SMS messaging that allows for chat functions. This allows Eastern to reach out to customers via both call and text. Eastern can then build a database of the customers' preferred contact method and times based on past history and then choose to contact them that way next time. Furthermore, using a contactability score on the phone numbers assigned helped to determine which customers actually answer their phones.

## Outcome

The company was able to achieve a significantly higher response rate and ultimately save more customers from going delinquent. Furthermore, it was able to increase the customer experience by reducing the number of calls made and contacting customers via their preferred channel.

## Challenge

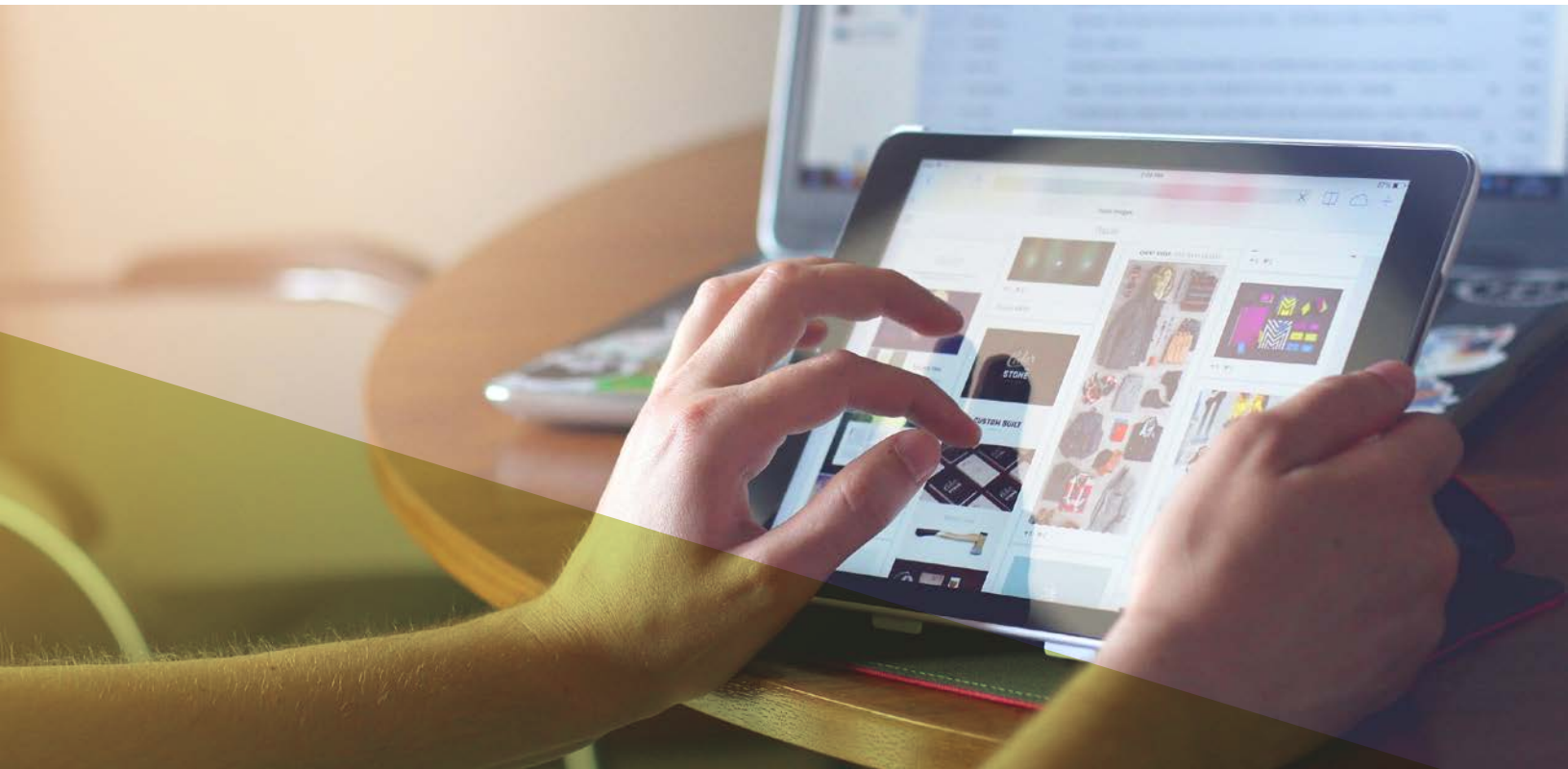
A leading Cable provider is looking to increase the FCR and customer experience on delinquent customers calling in to its operation. This "inbound collections department" was only trained to discuss the balance and work on a solution to bring the customer current. This usually resulted in the customer needing to be transferred to after the balance was discussed to either right size the customer or handle any other issues.

## Solution

Eastern was able to work with the company and design a training program to up-skill the agents to handle basic functions of some of the other departments. Agents were trained in basic customer care/billing functions, tech support, and retention. This allowed these agents to speak confidently to customers about billing issues, perform basic troubleshooting, or apply small credits where needed.

## Outcome

Eastern was able to significantly increase CX scores, including FCR, by being able to handle more than just one function in each department. Handle times had a slight increase, but the cost savings in additional transfers to other departments far outweighed it.



## 5 Ways To Increase Customer Centricity With Automation

Is it strictly good for the business, or does it actually help the customer?

When evaluating new technologies, customer contact leaders routinely wrestle with this question. A solution may promise significant gains in operational efficiency, but if it has a neutral or negative impact on the customer experience, it is not worth pursuing.

IVR systems infamously brought this dilemma into the limelight. The idea of deflecting calls was enticing to business leaders who wanted to save time, money, and resources. Unfortunately, many IVR experiences were slow, frustrating, and ultimately ineffective for customers. These customers developed a negative perception of the brand *and* still required support from a live agent anyway.

Given their history with the IVR, customer contact leaders are reasonable to approach digital-era forms

of automation with skepticism. Do not, however, let this skepticism close the door on your automation interest. When implemented correctly, automation will simultaneously increase efficiency *and* customer centricity. Not merely “acceptable substitutes,” robotic process automation (RPA) bots can actually handle certain functions better than human workers. They simultaneously empower employees to perform “human” tasks more effectively.

This briefing details five ways automation can actually boost customer experience. By following these steps, you will create more efficient, more personal, and ultimately more satisfying interactions for your customers and agents. You will realize the true potential of automation technology.

## Can Automation Do It Better?

Rote, repetitive tasks are frustrating for agents and costly for the business. By automating these processes, you stand to boost morale and reduce contact center spend. The “augmented agent” will be freed up to do higher value tasks and provide even better customer service.

But in today’s era of competing on the customer experience, “good enough” is not enough. Instead of settling for operational gains alone, why not also pursue opportunities to elevate the customer experience? Why not be certain you are realizing the full potential of your human workforce?

By focusing on the five advantages listed below, you will identify opportunities where automation can *add value* rather than simply prevent you from losing value.

### Task Performance

Customer-centric organizations do not automate tasks simply because they are mundane. Some tedious tasks still require a human touch. Automation is a tool that enables a higher human touch by automating the mundane tasks.

These organizations do, however, recognize that *many* internal tasks and processes will actually benefit from the consistency and computing power of RPA. Automation tools, as an example, can perform CRM data entry and customer insight analysis more quickly and accurately than human workers. By shifting these tasks to technology, you will not simply free your agents of repetitive work but actually *increase* the quality of that work.

“Once programmed correctly, the bots are virtually flawless; they are nearly 100% accurate,” explains Mihir Shukla of Automation Anywhere. “They never have bad days - and those are 24/7 days, by the way. These bots also free up humans to do more high-value work, such as provide additional service to customers, as in the case of a customer service agent.”

“RPA is especially powerful for heavily regulated industries like banking and healthcare,” declares Shukla. “RPA bots can be programmed to do regulatory reporting with nearly 100% accuracy. This not only ensures compliance with regulatory laws, but it also saves massive amounts of manpower. In fact, one life sciences company reports that it spends 240,000 man-hours performing compliance-related work. That’s 120 full-time employees per year!”

### Regulatory Issues

Accuracy is always important in the contact center, but it is absolutely essential in matters with legal or regulatory ramifications.

Cognizant of the stakes, organizations within certain industries will devote significant manpower to compliance-related tasks and interactions. Highly inefficient, this approach is also imperfect: humans are always capable of error.

Since properly programmed automation tools are immune from singular lapses in judgment or mistakes, they represent a superior option for handling these tasks. The organization, in turn, enjoys compliance processes that are substantially more efficient *and* less risky.

“A customer was not contacted when promised and wrote an angry email to an insurance company,” details Shukla. “A bot read this email, interpreted the sentiment and immediately routed to a customer service agent who had been assigned to this upset customer. The bot also notified the customer service agent of the situation.”

### Qualification And Routing

Agents’ propensity for empathy and connection typically represents a positive within the customer experience. There is, however, one downside to this human characteristic – it can become an overused strength. As agents seek to meaningfully connect with *everyone*, they compromise their

ability to prioritize certain customers or issues. This does not simply create an inefficiency; it also means high-value customers with mission-critical issues will not receive the appropriately urgent care.

By virtue of their ability to objectively and instantly analyze key data, automation tools can more successfully prioritize and route customers. For example, a chatbot can more swiftly assess the lifetime value of a customer, the tone of the conversation, and the urgency of the issue. Based on this analysis, the automation tool can route the customer to the right queue for the right agent. Customers will always receive a contextually relevant experience, which is the epitome of customer centricity.

“In a contact center setting, attended automations, where bots are deployed to help service reps gather information quickly to resolve customer inquiries is a common use case,” says Shukla. “In these scenarios, call handling greatly reduces call resolution time (CRT), which can improve operational costs and customer satisfaction.”

## Agent Augmentation

The customer contact community almost universally agrees that automation is not about replacing the human workforce. It is about augmenting human performance.

One key method of augmentation involves customer service workflow. By handling tasks that make more sense for technology, RPA allows humans to focus on the work for which they are best suited.

The other key method involves interaction empowerment. Bots are uniquely capable of gathering and reporting context about a customer, an inquiry, or a product issue. By providing this information at key moments of truth, they empower agents to make the most of interactions. Agents will not have to become silent or rattled as they fumble through the knowledge base or scramble to look at seven different screens; they can simply use the information in front of them to delight the customer.

## Transactions And Order Processing

In today's era of web banking, online shopping, and smartphone calendars, customers are demonstrating an affinity for handling transactions in the digital world. Why try to remember account information or buy clothes over the phone when they can process these transactions with the click of a button?

This reality underscores the relevance of using automation for transactions, account management, and order processing.

Instead of asking customers to call to revise a delivery order (and deal with background noise and potential error as the employee looks up the order), you can allow them to make changes in a bot. Instead of asking customers to wait for a live chat agent or trust a phone agent to properly process an order, you can let customers make purchases using an automated web platform. Instead of asking customers to leave their computers and call for assistance accessing their accounts, you can build an account restoration tool into the bot experience.

In each case, the error rate falls as the convenience rate rises. Customers can process the transactions they want in the channel they want. Your organization, meanwhile, empowers its agents to focus on less transactional endeavors.

## Jumpstarting Your Automation Journey

An automation journey requires more than the right mindset. It also requires a strategic approach to execution.

By approaching automation investments from a careful, strategic perspective, you will ensure your initiative does not produce any unintended consequences. You will ensure you achieve gains in both operational efficiency and customer centricity.

The most successful automation journeys involve a few key steps. 1) identify the need, 2) develop a pilot, 3) deploy the system, and 4) scale the system.



## Identify The Need

Think about your customer experience journey. Where are the gaps? Where are the opportunities? By identifying the functions most conducive to automation, you establish an appropriate starting point.

## Develop A Pilot

Once you identify automation opportunities, it is time to begin testing. As part of the pilot, assess how automation performs the task at hand as well as how it impacts overall workflow.

## Deploy

Using data from the pilot, deploy and then measure the impact of your automation solution. To maximize the result, ensure you are also accounting for any overall changes to the operation. If bots eliminate 20% of an agent's calls, as an example, prepare agents to optimize this newfound availability; enable them to do higher value work.

## Scale

Contact center performance is a never-ending endeavor, which means there are an infinite amount of opportunities for automation. Once you have perfected the process for one task, expand automation to include other high-value functions. In addition to buying new technology, the scaling process will include establishing an internal center of excellence that can best manage, tune, and optimize automation and artificial intelligence initiatives.



## Automation - A Valuable Reality

The idea of automation driving meaningful business value is not an empty promise. It is a legitimate reality for many organizations.

Numerous Automation Anywhere partners have achieved particularly impressive results. The solution provider partnered with them to deploy RPA at various points of the customer contact journey, leading to high-impact business rewards and compelling improvements to the customer experience.

### Bancolombia

#### Challenge

Needed to automate to enhance banking customer experiences and improve the bottom line

#### Automation Solution

Implemented RPA Bots, automating hundreds of processes and greatly increasing back office efficiency

#### Outcome

127,000 hours freed per year in branches; 11,000 person-days saved; 51% Increase in efficiency of service time; \$7M income from new revenue streams; \$ 19M reduction in provisioning costs; 1300% return on investment.



## Stant, Inc.

### Challenge

Invoice-matching backlog; cannot keep up

### Automation Solution

Invoice-matching bot with exception processing

### Outcome

Reduced backlog from 3 weeks to under 4 days (and declining); zero errors.

## Human Resources in Leading Life Insurance Company

### Challenge

Backlog of 60,000 employee records; 2.5 years behind

### Automation Solution

Created a Digital Workforce with RPA, automating the entire process

### Outcome

Cleared the 2.5 year backlog of work in just two months. The bot continues to process HR documents, saving over 120 hours of manual effort per month, saving over \$200K per year.

## TreasuryONE

### Challenge

Needed automation to remain competitive

### Automation Solution

Use RPA to eliminate repetitive, manual aspects of its back-office operations, including performing settlements and sending out deal confirmations

### Outcome

Four end-to-end processes were automated, reducing errors by 100%, and giving back 70 hours to employees for customer relations and other CSAT-related activities.

## Juniper Networks

### Challenge

Needed to find innovative ways to cut costs and add value

### Automation Solution

Automated billing portal process for its six largest customers, automatically triggering and uploading invoices every time a new order was delivered, automating the invoice submission process of matching order number, item, quantity, price, and tax, eliminating all intensive, high-volume, and error-prone manual tasks. Juniper was able to add better controls to the process, helping to reduce overall risk.

### Outcome

100% reduction in process cycle time; 2 days reduction in average days late; 24/7 unlimited billing capacity; 33% reduction in manual labor; 2 days improved cash collection; Accuracy = 100%



## 5 Ways To Rethink Contact Center Performance

Contact center leaders may not always make the right investments or take the right actions, but they are not naive or stubborn. They know they have performance gaps, and they know they have the opportunity to become more customer-centric.

The market study research, as an example, reveals an awareness that agent tools are frustrating and unproductive. It confirms a pledge to make digital and self-service platforms more robust and customer-minded.

Acknowledging pressing challenges is not, however, the same as identifying particularly powerful opportunities. It may indicate that contact centers want to improve, but it does not guarantee an intention to reinvent.

Given that you are competing on the customer experience, reinvention should be your aim. Instead of ensuring the contact center does what it is supposed to do, why not empower the contact center to do everything it can do?

This guide provides five opportunities for such reinvention. By transforming how you approach common contact center objectives, it eliminates limitations on how well you can connect with your customers.

## Appeal of Self-Service Tools

Do not settle for deploying self-service tools that your customers *can* use. Create a self-service platform that your customers want to use.

Thanks to the low bar set by IVR technology, many organizations have adopted the incorrect belief that “not bad” is “good enough.” Their only goal is to offer bots that can adequately perform basic tasks.

While decently functional bots may result in higher self-service utilization and greater contact center efficiency, they will not meaningfully elevate the customer experience. They will not make the customer feel as if they are receiving a more valuable, more personal experience.

To achieve that standard, ensure you are offering self-service capabilities at relevant moments of the customer experience journey. Power these tools with AI, natural language processing, robust user portals and multilingual conversational ability, and build familiarity by educating customers on the value of self-service options.

Most importantly, hold these tools accountable for *real* contact center outcomes like first contact resolution, advocacy level and CSAT score.

## Navigability of Customer Intelligence

More than four-fifths of contact centers require agents to view multiple screens when serving customers. Many fail to offer a 360-degree view of the customer

experience, and a substantial percentage provide little-to-no context when customers escalate to a new channel.

Suffice it to say, organizations understand the importance of integrating contact center and enterprise systems. They value the notion of collecting data from a myriad of internal and third-party sources and then putting that data at the fingertips of their agents.

The most customer-centric organizations will not, however, stop there. They recognize the risk of data overload – providing agents with *too much* information can be as unproductive as providing them with nothing at all.

Leveraging effective journey mapping, voice of the agent feedback and artificial intelligence, organizations focus on putting the *right information* in the hands of the *right agent* at the *right moment*. Rather than bombarding agents with the minutiae of every product or the full backstory of every customer, they aim to minimize clutter. Their interfaces prioritize what agents need to know in the moment rather than everything they could ever want to know about a particular customer or issue.

Navigability, indeed, represents an important benchmark for the contact center. Instead of celebrating the breadth of data available in enterprise systems, emphasize the relevance of the data that is instantly accessible. When your contact center framework can parse survey feedback, interaction analytics, social media comments, field services insights, and industry benchmarks to provide crucial insights to agents and bots at key moments of truth, you have a real reason to celebrate.



## Actionability of Customer Intelligence

If you can locate relevant insights within the sea of available customer data, you will markedly distance yourself from the competition.

Do not settle for that advantage. You can actually create even more competitive differentiation.

Once you are certain you can get the right information to the right touch points, focus on making this data *actionable*. Not another word for “descriptive,” actionable data is that which specifically empowers advantageous behavior. Instantly available to agents and bots at key moments of truth, this data provides *clear* recommendations on which steps to take. It also provides risk assessments and backup plans to preserve a great experience in the rare event the conversation does not flow exactly as predicted.

All contact centers have a list of things their leaders, supervisors, and agents can do. By committing to actionable intelligence, you will provide stakeholders

with clear guidance on what actions to take exactly when they need to take them.

## Opportunism of the Customer Contact Operation

“Customers ultimately care about getting their problem solved.”

On the one hand, this customer service cliché is immensely valuable. It reminds the contact center community of its core priority: no amount of bells-and-whistles can compensate for failing to answer questions and solve problems.

On the other hand, the adage can close our mind to the vast opportunity that exists within each interaction.

In the name of customer centricity, do not fall into this “resolution” trap. When assessing the quality of your contact center interactions, look deeper than “first contact resolution.” Focus on what more you can do for each customer as well as what value you can generate for the business.

Instead of celebrating a quick resolution to an inbound call, as an example, consider whether you can prevent similar issues with proactive engagement. Instead of ending calls once the problem is solved, identify opportunities to either upsell the customer or at least provide preemptive guidance about future issues that may arise.

By carefully mapping your journeys and diving deep into sentiment analytics, you can make every “moment of truth” as meaningful as possible.

## Quality of Agent Development

“Automation handles simple tasks so agents can focus on complex ones.” “Automation does not replace agents, it augments them.”

We all know the story: automation solutions stand to make our agents more productive than ever. They allow agents to devote more attention to higher-value tasks, while also providing them with the guidance and support needed to excel at this work.

Recognizing the obvious value of this dichotomy, the customer contact community justifiably raves over “next best action recommendations” and “intelligent routing.”

To truly elevate your contact center, look beyond agent performance within individual interactions. Focus on the bigger picture – and the future. Focus on meaningful agent development.

Using robust analytics, identify “best practices” worth incorporating into group and one-on-one training. Leverage broader market data to predict trends in customer demands and then prepare agents to cultivate the necessary skills.

As you incorporate automation into your contact center, map changes to agent workflows. Using these insights, gaps in skills as well as opportunities to further enhance the agent experience journey.

To put it simply, do not simply use automation and analytics to empower agent performance in today’s landscape. Use technological innovation to create better overall agents who can make lasting contributions to your contact center.





# talkdesk

## How To Increase Call Center Agent Productivity

Enhancing productivity within the contact center is on the top of the to-do list for most customer service managers and executives. At first glance, this may seem like a daunting task. But when armed with information, motivation and dedication, managers can significantly improve the productivity of their agents and contact center as a whole with relative ease.

This e-book recommends tips, tools and practices to enhance agent productivity within the contact center. It compiles information from contact center industry leaders, workplace productivity best practices and psychological principles to provide everything you need to increase agent productivity within your contact center.

## Improving Managerial Practices to Enhance Contact Center Agent Productivity

Typically, boosting productivity within the call center starts with optimizing managerial practices. There are so many changes that managers can make to enhance productivity within their team and many are simple to execute and produce lasting results. Check out our top nine below and see how you can improve agent productivity in your contact center:

### 1. Enhance Agent Training

Most call center agents receive little training. According to Colin Taylor, CEO of The Taylor Reach Group, “Many of today’s contact centers train an agent just once; the remainder of his or her employment education comes from co-workers over the next six months — not exactly a reliable source of information.”

If your goal is to increase your contact center’s productivity, the first place you should start is with adequately training your agents.

Providing top-notch training will decrease average handle time, increase first contact resolution, reduce errors and improve overall call center productivity. Additionally, enhancing agent training will drive up employee and customer satisfaction and loyalty.

Are you ready to start revamping your agent training processes? Here are some tips to help get you started:

- ✓ Orient new agents to the company culture
- ✓ Introduce agents to the key team members and departments
- ✓ Provide agents with information about company policies, procedures and work ethic guidelines
- ✓ Provide agents with a comprehensive overview of their job requirements
- ✓ Provide in-depth training on contact center software and business tools – let agents get their hands dirty and provide in-the-moment feedback until they nail it
- ✓ Teach agents basic troubleshooting tips (i.e., what to do when your headset isn’t working, software goes down or internet connection is weak)

- ✓ Inform agents of company best practices
- ✓ Provide agents with detailed training manuals, recorded videos, recorded calls that demonstrate a specific point (i.e. how to handle a difficult customer, what to do when you don’t know the answer, etc.), use cases, FAQs, etc.
- ✓ Role play common scenarios and provide agents with in-the-moment feedback
- ✓ Teach agents how to use the knowledge base
- ✓ Educate agents about your customer base and target market
- ✓ Train agents on proper call center etiquette
- ✓ Monitor agents throughout the training process and provide feedback (both quantitative and qualitative) along the way
- ✓ Partner new agents up with a more experienced agent (mentor) who is trained in managing new employees – make this their go-to person for the first six months
- ✓ Have frequent 1:1 check-ins with agents during their first six months
- ✓ Constantly refresh and revisit training throughout the agent’s tenure – training should never stop

If your training protocol skips some of these basic steps, make sure you add them immediately. Skipping on contact center agent training can be a huge productivity drain down the road.

### 2. Cross-Train Agents

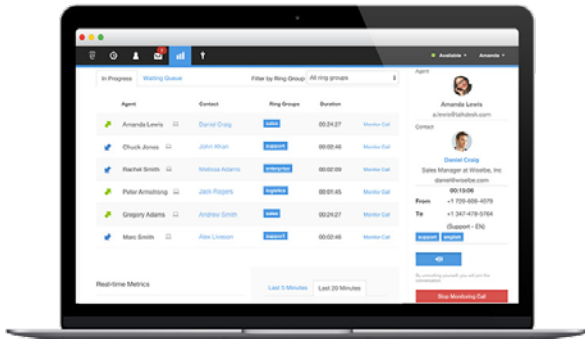
Another way to boost agent productivity is to cross-train agents so they are proficient in more than one channel or contact type. For example, USAA started cross training their contact center agents over a decade ago to ensure that they could answer both investment and insurance related calls. This increased productivity, decreased the number of transferred calls and eliminated the need to hire extra staff during times of increased call volume.

Cross training agents is also very effective for smaller contact centers with lower volumes that are hoping to reduce idle time in order to boost productivity. When agents are trained to handle different contact types (i.e., sales and support), they are less likely to be idle and productivity will increase.



In sum, cross-training agents dramatically increases productivity within the contact center by reducing transfers, increasing first contact resolution, reducing agent idle time and decreasing the need to staff extra agents during periods of high volume.

### 3. Enhance Quality Control And Quality Assurance Practices



No contact center manager should take a set-it-and-forget-it approach to managing their team. Once you've ensured that your agents are well-trained you have to monitor their performance. Listen to live calls without the agent or customer knowing to evaluate the effectiveness of the agent. If during monitoring sessions you notice that certain agents struggle with specific questions or your team isn't efficient at resolving specific issues, go back to square one and conduct training on the issue. Eliminating extra steps,

or correcting ineffective processes, can help improve contact center agent productivity by reducing average handle time, thus increasing an agent's capacity to handle a greater number of interactions.

When monitoring, don't just stop at identifying areas for improvement. If you feel that an agent did a particularly excellent job at resolving a tough issue, defusing an angry customer or troubleshooting in an effective way, pull that call recording and use it to train other agents. This can dramatically improve the training process while acknowledging and reinforcing the positive behavior of top agents.

In addition to pulling call recordings when things go well, analyze the call recording when things don't go so well. Have a particularly frustrated customer? Dig deep into the call recording to find out what went wrong. Use this as a tool for training and feedback and your team will have concrete examples of what not to do. If your agents can become skilled at avoiding confrontation or de-escalating angry callers, their average handle time will significantly decrease. This will not only have a large impact on customer service quality, but will also greatly improve productivity.

Enhancing your quality control and quality assurance practices starts with improving your call monitoring techniques. It is not enough to simply monitor live calls, you must be willing and able to provide immediate feedback and use call recordings to help bolster team productivity and performance.



## 4. Monitor And Assess Idle Time

Do you know exactly how your agents are spending their idle time? Can you answer this without strolling the floor and taking a head count? If not, you can definitely stand to improve contact center agent productivity by increasing your awareness of how your team spends their idle time and then correcting policies and procedures to reduce inefficiencies and boost productivity.

To do this, invest in contact center software that shows exactly what your agents are up to when they are idle and monitor this throughout the day. You can also take a look at detailed reports to pinpoint inefficiencies. Use this information to provide informed feedback and concrete instructions on how to improve their productivity.

For instance, if you notice that Sally takes 15 minute breaks after each call, check in with Sally to uncover the root cause of this behavior. If she says her back hurts and she needs to stretch it out, provide her with more ergonomically appropriate working space. Or if it is because she is overwhelmed with handling angry customers and she has to blow off steam after each call, provide her with more effective tools to handling angry customers. Once you have an understanding of how your agents are spending their idle time, do your best to troubleshoot and resolve any issues so they can be more productive.

## 5. Consider Outsourcing Non-Core Competencies

Have you noticed that certain types of contacts or tasks are productivity-zappers? Would you love to eliminate them from your core-team's designated tasks? If customer service, sales, marketing, or IT isn't a high priority for your business, then outsourcing all or one of these non-core competencies to an off-site contact center may make a lot of sense. You can then focus your team's energy on what is most important for your business and watch as productivity skyrockets.

## 6. Employ Remote Agents

Various pieces of research on remote contact center agents arrive at the same conclusion: agents who work from home experience an increase in performance and productivity, improved work satisfaction and decreased attrition. With benefits like these, most contact center managers are onboard with the idea of employing a remote workforce.

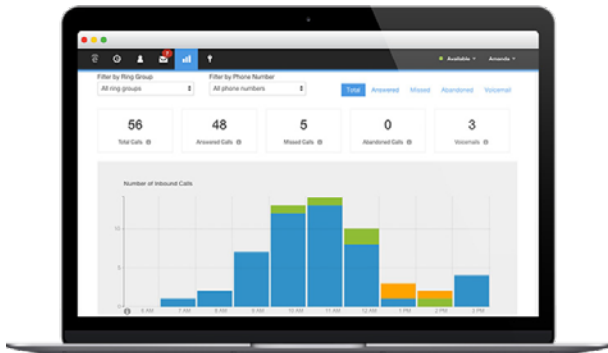
In fact, more progressive companies are already benefiting from increased productivity by allowing their agents to work from home. "We're open from 6:00 a.m. to 10:00 p.m. [and] nobody wants to work until 10:00 p.m. in office," says Mike Foster, manager of technology development at Tower Travel. "But if they're a home-office agent...[working from 1:00 p.m. to 10:00 p.m.] it's not as big a challenge than if they had to be physically in an office on a second shift." Foster goes on to say that he found his team is not only able to cover more hours, but is also more productive. In fact, working from home is such a popular request and has such a great impact on productivity that they even use it as an incentive.

If you are interested in employing a remote contact center workforce, or allowing your agents the option to work from home, check out these helpful resources:

- [Employing At-Home Call Center Agents is a Win-Win-Win](#)
- [The Basics of Employing Remote Call Center Agents](#)
- [How to Hire and Manage At-Home Call Center Agents](#)
- [11 Tools Required for Employing an At-Home Workforce of Call Center Agents](#)
- [7 Advantages of Call Center Co-Sourcing](#)

## 7. Reassess Your Metrics

Analyzing workplace and agent productivity accurately can be a complex endeavor. But, it doesn't have to be. If you know which metrics to analyze and how to interpret them, you'll be well on your way to having a solid understanding of how productive each agent, team and your contact center as a whole is at any given moment.



By focusing on the metrics that matter, you can refine your approach to managing and provide more effective feedback to boost productivity.

## 8. Solicit Employee Feedback

As a manager, in order for you to have your finger on the pulse of your customers, processes, and operations, you have to ask your frontline employees. They are the ones in the trenches, battling it out each day with your customers, employees, software, policies and procedures - so who better to ask what is working and what can be improved.

Ask agents for feedback on specific tools or processes (i.e. "Tell me one strength and one weakness of our contact center software"). Solicit this information in

confidential surveys, one-on-one meetings and focus groups. Once you collect the data, act on it. When your employees see changes being implemented based on their feedback, they will feel as if their opinions are valuable and that they are a vital member of the team. In addition to improving productivity within the contact center, acting on this feedback will also boost agent productivity as they will be more motivated and engaged with their work.

## 9. Solicit Customer Feedback

In order to improve contact center agent productivity, you must go straight to the source to see what is working and what isn't. Ask your customers targeted questions about their experience, their level of satisfaction with your company and ideas for improvement. You might find that the policies and procedures you thought were sound are actually sources of customer dissatisfaction and frustration.

Acting on customer feedback to streamline business processes and adjust the approach to addressing your customer's needs will not only improve average handle time, but increase the overall efficiency and productivity of your team.

Enhancing agent, team and contact center productivity is often at the top of the to-do list of many managers. And, it should be. Where managers can go wrong is putting the pressure on the agents and teams themselves to "work harder" in order to boost efficiency and productivity. Instead, managers should start by optimizing their own practices – revamp training, enhance quality control practices, outsource non-core competencies, allow agents to work from home and continually monitor and optimize these changes. Doing so can increase agent satisfaction, reduce agent turnover and streamline business processes - all of which enhance productivity.



## Enhance Contact Center Agent Productivity with the Right Tools

Looking to enhance call center agent productivity by leveraging the right tools? The best place to start is with your call center software. Call center software has made huge technological strides within the past few years. Now you have the luxury of picking a solution that has all of the features that your team requires at a price point that is surprisingly affordable. Whether you're in the market to pick a new contact center software solution to increase your team's productivity, or just want to see how your solution is stacking up, exploring the tools and features below is a great place to start.

### 1. Cloud-Based Contact Center Software

The contact center environment is changing. Companies are increasingly reaping the benefits from employing an at-home, dispersed, mobile, and/or a global workforce. These forward-thinking companies require a contact center software solution that can keep up with their needs. Cloud-based contact center software is the best solution that allows these companies to maintain a flexible workforce.

With cloud-based contact center software, agents need only a computer, internet connection and a headset to they can make and receive contacts from anywhere in the world. Managers can also keep track of how their dispersed team is performing with real-time metrics, call monitoring, call conferencing, call recording and historical reporting. Cloud-based contact center software will ensure that your team remains connected, collaborative and highly productive, no matter where they are located.

Cloud-based contact center software also brings significant advantages to teams located on-site. They are often more affordable, simple to deploy, simple to use and less costly to maintain. By eliminating on-site hardware and software, cloud-based contact center software also eliminates a lengthy setup process as well as any need for up-keep. Thus, your technical team will breathe a sigh of relief and can spend their time taking care of more pressing technical issues.

With benefits like these, if you had to make one change in order to increase the productivity of your team utilizing cloud-based contact center software should be it!

## 2. Integrated Contact Center Software



Do your agents utilize a helpdesk, CRM, back-office solution, a personal Excel worksheet, etc? Are these integrated? Do they have to update each business tool with redundant information after each interaction? If so, this is a HUGE productivity zapper. It makes tasks unnecessarily complex, compromises agent productivity and impedes the quality of the customer service they provide.

It's not uncommon to see contact center agents using multiple systems with several screens open at once. Anyone who's toured a few call centers understands that this complexity is a big inhibitor to

agent productivity. The result is the constant rekeying of the same information into several disparate systems — a huge waste of time and money. Putting an incentive on reducing average handle time is not as effective as eliminating one or two of those windows.

Utilize contact center software that integrates all of your business tools into one unified desktop. They give the agents a comprehensive overview of the customer (i.e., call logs, tickets, cases, events, chat transcripts, social media interactions, etc.) and allow agents to complete tasks (i.e. close a ticket in Zendesk, update a contact in Salesforce) all from the contact center software interface. These solutions increase agent productivity by streamlining workflow.

## 3. IVR

Another contact center software tool that will have a huge impact on agent and team productivity is an interactive voice response (IVR). IVRs are automated telephony systems that enable identification, segmentation and routing of callers to the most appropriate agent within your team. Some of the benefits of IVRs that will improve productivity are that they:

- **Increase first contact resolution** – With IVRs, callers are always directed to the agent who is most capable of meeting their needs or the most appropriate department.
- **Increase agent and company efficiency**– agents who are only assigned callers within their competency areas are more skilled at addressing specific issues, less likely to consult with colleagues or a manager and less likely to transfer the customer to another agent.
- **Reduce operational costs** – IVRs effectively replace a receptionist or a customer service agent who answers calls and directs calls to agents, saving teams time and effort.

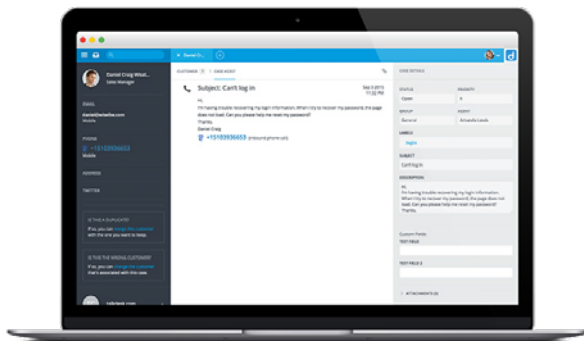
Taken together, IVRs will significantly streamline business processes and allow your agents and teams to be more effective. The result? Increased agent and team productivity.



#### 4. Skills-Based Routing

Utilizing skills-based routing to direct contacts to the most appropriate agent can have a huge impact on team and agent productivity. Skills-based routing systems will route calls based on agent department, skills, knowledge, language, geographic location and other customized options. Additionally, the phone number the customer called, the choices the customer selected in the IVR and the customer's previous interactions with the company can be stored and used to direct the customer to ideal agent for their issue. Greg Steiner, eHarmony COO says they use skills-based routing "to improve the productivity of our agents, the accuracy of response, and the timeliness of the response." Skills-based routing tools streamline business processes, enhance agent effectiveness, reduce transfers and increase first contact resolution – all of which have an impact on call center agent productivity.

#### 5. Click-To-Call



Utilizing contact center software with a click-to-call feature will allow your agents to simply click on the phone number in your CRM, help desk, sales software or website, to make an outbound call. This feature eliminates the copy and paste method and will save your agents time and effort. It is a simple feature that has a big impact on productivity.

#### 6. Power Dialer

Power dialers automate the outbound calling process and is a great tool to boost agent and team productivity. Your agents can upload or compile lists, click "start" and the power dialer will automatically call contacts on the list, one after another, until someone answers. When a contact answers, the relevant information about the person will be displayed in the agent's interface. This makes the sales process more efficient, streamlined and effective.

Enhancing contact center agent productivity by upgrading or migrating to a new call center software solution doesn't have to be challenging. As a manager or executive, you should always have your finger on the pulse of the latest and greatest advances in contact center software and be agile in your approach to adopting new technologies.

The contact center software industry is just now going through an incredible shift – with the advent of cloud-based technologies – and this has made it easier than ever to customize a solution to fit your specific business needs. When selecting a contact center software solution, making sure that your contact center software is enhancing your agent, team and contact center productivity – rather than impeding it – should be your number one priority.



## Enhancing Contact Center Agent Productivity by Streamlining Processes

Streamlining business processes can have a huge impact on enhancing agent, team and contact center productivity. There are many changes that you can make, with relative ease, that have great short-term and long-term benefits. Below are the top seven.

### 1. Provide Information On Your IVR

A huge benefit of utilizing an IVR is that you can allow your customers to help themselves, thereby freeing up agents to answer more complex issues. Customers can receive answers to simple questions like “What are your business hours?”, “Where are you located?”, “What is your product return policy?” and “When is your Christmas Event?” by pressing the appropriate number in the IVR.

This system has increased productivity at Merrill Lynch, according to Judy Nelson, Vice President at Merrill Lynch’s Global Private Client Services and Technology. “Opportunities to provide information up front to clients

through pre-recorded messaging often answers seasonal [or] event-driven inquiries and eliminates the need to speak to an associate. In one instance, scripting in our voice response system reduced representative call duration by 75 seconds.” Having pre-recorded messages decreases the number of calls that are transferred to an agent and as a result increases agent and team productivity.

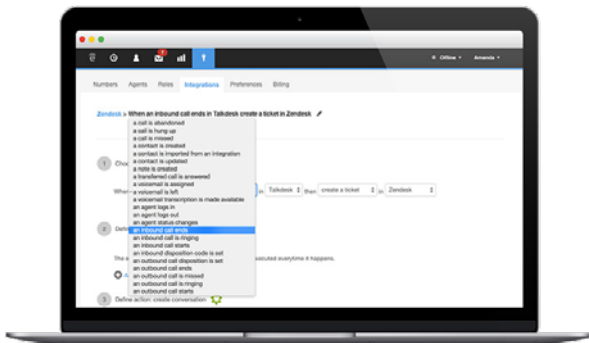
### 2. Leverage Other Channels

One of the best ways to improve contact center agent productivity is to divert customers to other channels. Utilize web self-service options, email, pre-recorded messages on IVRs, and live chat to interact with

customers and call volume will decrease. In addition to freeing up agents to handle more important issues, agents could interact with more than one customer at a time (i.e. two customer chats) and respond to emails or other backlogged work during idle time, thus maximizing productivity.

“One of the primary contact center productivity initiatives has been to give callers clear choices to use other channels to obtain their answers,” says Jon Anton, Ph.D., Director of Benchmark Research at Purdue University’s Center for Customer-Driven Quality. “There are many times when a customer does not need to talk ‘live’ to an agent. The question is simple, the answer is easily found through self-service, and the customer is happier with the speed and accuracy of these alternative channels.

### 3. Automate Repetitive Manual Tasks



Agents have a lot to take care of. Why not automate some of the more repetitive manual tasks. Not only will this free up agents to take care of more important issues, it will significantly reduce errors and ensure that the information in your business tools is always up-to-date. Contact center software that offers automated tasks like:

- When a call is missed, create a case in Salesforce
- When a call ends, add the call log, recording, and disposition code to Zoho
- When a new voicemail is received, add a new ticket in Zendesk
- When a new contact calls, create an opportunity in Salesforce

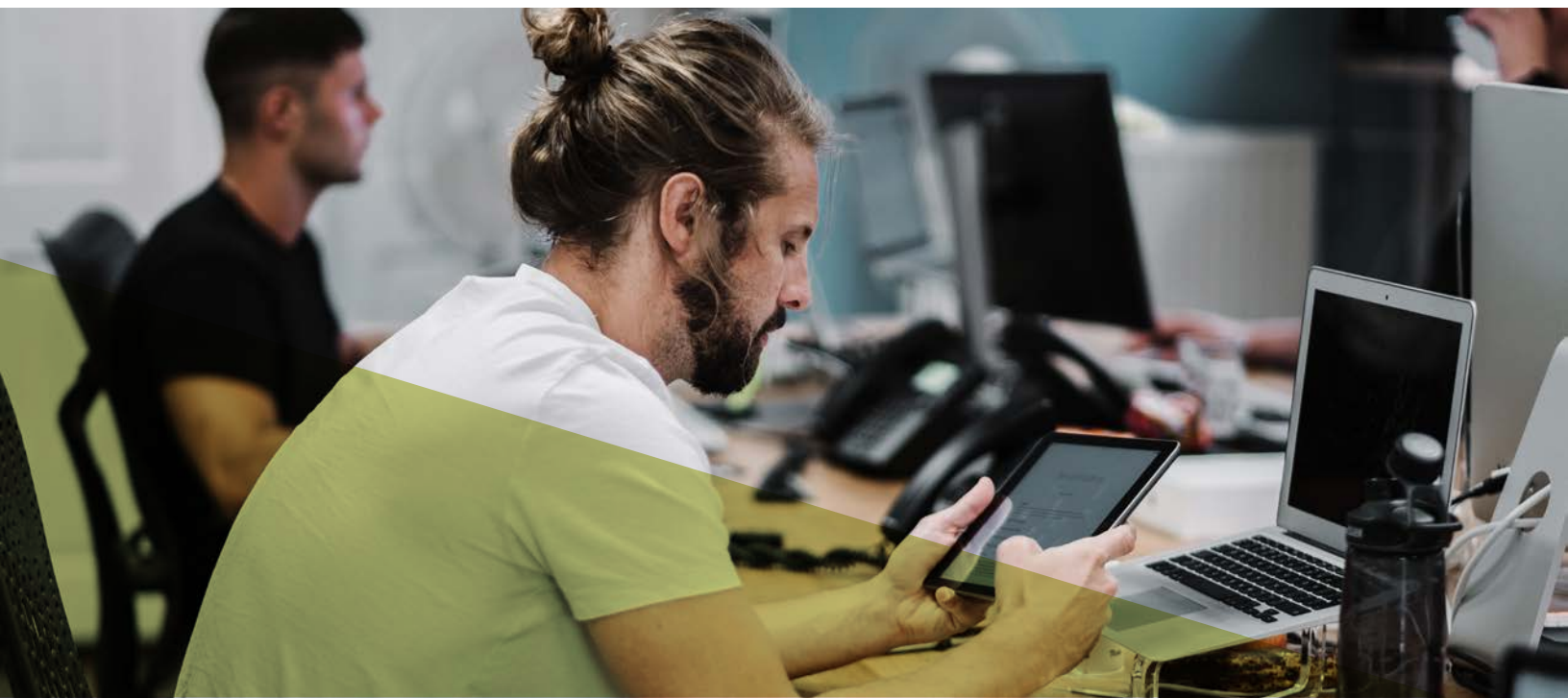
### 4. Enhance First Contact Resolution

First contact resolution (FCR) means adequately addressing the customer’s issues the first time they contact your organization. FCR has a large impact on agent and team productivity as customers whose issues are resolved on first contact are less likely to call back about the same issue (which decreases inbound volume – freeing up agents to handle more pressing issues) and are less likely to be transferred or escalated to a manager.

According to a study conducted by Dimension Data, the top issue that contributes to a decrease in FCR is lack of access to customer information and systems data. This occurs when software is not integrated, when agents don’t have access to the customer’s history , when agents forget to input information into the business tools, and when agents don’t have access to accurate information about the product/service . Agents in these situations are less likely to resolve a customer’s issue on the first attempt and more likely to have to transfer the contact or call the customer back. If your team can identify with one or more of these practices that decrease FCR and you’re looking to enhance productivity by enhancing FCR, here are some great resources to get you started:

- [Why You Should Measure First Call Resolution](#)
- [How to Measure First Call Resolution](#)
- [16 Factors Influencing First Call Resolution](#)
- [11 Ways to Help You Improve First Call Resolution](#)
- [How to Improve First Call Resolution: A Guide for Agents](#)





## 5. Utilize Workforce Management Software

Inbound volume fluctuations can be the Achilles' heel of contact center productivity. Workforce management tools ensure that the right agents, with the right skills and training, are on shift exactly when you need them. Foremost Insurance Group has recently seen its contact center productivity increase as a direct result of workforce optimization. "Foremost was experiencing rapid growth that was increasingly complicating our business," said Nancy Treul, Senior Vice President of Marketing. "Since implementing a workforce management strategy, Foremost has seen productivity increase 24 percent, service level improve more than 120 percent, average speed of answer drop to 18 seconds, abandon rate fall by 85 percent, and cost per call decrease 40 percent." This tool will significantly improve productivity in your contact center.

## 6. Utilize A Knowledge Base

There is no bigger productivity-zapper than constantly having to search through multiple systems, emailing engineering, calling in a manager, or asking a colleague to find an answer to a common question. To combat this, companies are utilizing a comprehensive

knowledge base. For example, at Scotts when a customer calls with a question regarding weed control, "our representative would type in the word 'weed' in the reason code field and do a search, and instead of seeing 1,000 reason codes, they see five that are associated with weed control." This makes it simple to answer a customer's question without having to involve third-parties or searching through multiple databases.

## 7. Utilize An Internal Communication System

Transferring calls can not only cause customer frustration, but decreases productivity on an agent and team level. Utilizing an internal communication system like Slack can make it simple for frontline agents to ask the technical team, a manager or a colleague an answer to a question, so they don't have to transfer the customer. Best Software, for example, uses their internal chat system as an add-on to its knowledge base. "[Instant messaging] allows us to do work...while we're online with a customer," says Ron Taylor, Vice President of Customer Support. "We probably reduced transfers by five or ten percent."

The seven aforementioned tips and tools can streamline business processes and significantly improve contact center productivity. Try them out and notice the impact they have on productivity within your team.



## Enhancing Contact Center Agent Productivity

Now that you have a solid understanding of how to increase agent productivity by optimizing managerial techniques, the tools agents use and contact center processes, let's take a look at how you can increase agent productivity by going straight to the source. The 10 tips suggested below can all result in more productive agents – and a more productive contact center!

### 1. Enhance Agent Autonomy

Allowing contact center agents a certain degree of autonomy can have a big impact on agent and contact center productivity. Research has found that the more autonomous agents are often, the more capable of effectively addressing customers' needs agents are by being flexible, responsive and personal (Oldham, 1996). This decreases the likelihood that the agent will have to transfer the customer to another department or request managerial input. This can have a huge impact on streamlining contact center workflow and will free up managers to attend to more pressing issues. Additionally, allowing competent agents the freedom

to be flexible in their response style and resolve issues creatively can bolster their morale, work engagement and productivity.

### 2. Increase Agent Participation

Many contact center managers have observed agents who feel as if they are a valuable member of the team are more motivated, engaged with their work and effective, resulting in higher productivity. Many companies are aware of this relationship and are including their contact center agents in the decision making process alongside higher ups. For example, Andrew Harvey, Operational Solutions Architect at RESPONSE stated that increasing

contact center agent participation in team meetings “has created a very positive environment in which our people understand their vital role in the success of our business. As a result, we have benefited from enhanced productivity in terms of schedule adherence, conformance and other productivity metrics as well as improvements in employee engagement and customer satisfaction.” Make sure your agents feel as if they are a vital member of your team by increasing their participation in decision making and you will benefit from a huge boost in productivity.

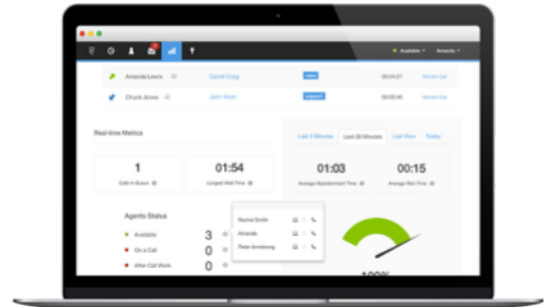
### 3. Leverage Idle Time

A survey conducted by Intradiem revealed that contact center agents are idle an average of 49 minutes per day and 76 percent of survey respondents felt it was important for agents to make the best use of this idle time. Intradiem CEO Matt McConnell recommends that managers allocate unproductive idle time to deploy “off-phone activities” to improve profitability and productivity. Importantly, these “off-phone tasks” should be completed in less than three minutes as that is the average duration of idle time. As a manager, break down large tasks into smaller pieces so that agents can tackle them one at a time and watch as your agent and team productivity skyrockets!

### 4. Allow Agents To Take Frequent Short Breaks

Stress within the contact center can have a significant impact on the agent, customers, and ultimately operational efficiency. When stressors within the contact center become significant, they result in decreased productivity, job satisfaction and health - all of which have a major impact on the contact center. Therefore, it’s important to allow agents to take frequent short breaks when their stress levels increase, when they need to get some air, eat a snack or use the restroom. Providing them with this flexibility will empower them with a greater of a sense of control over their experience of stress and increase productivity.

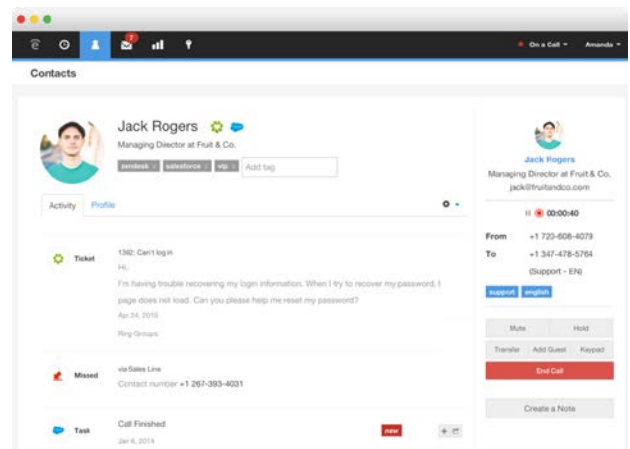
### 5. Provide Agents With Access To Real-Time Metrics



Agents that have access to real-time information like how many callers are in the queue, the status of other agents, longest wait time in the queue, average abandonment time and average hold time can better adapt to the contact center’s needs and make more informed decisions based on this information. For example, Scotts Company provides their contact center agents with real-time metrics so they can see how well they are doing in comparison to their coworkers. “If we present this information to them, the vast majority want to do better,” says Ed Billmaier, Director of Consumer Services.

“It’s a natural incentive we found to get them motivated to say, ‘Here’s where I am. Look how much better everybody else is doing.’ And, they take action to boost their own performance.” Knowledge is power and when you provide agents with the right information, their motivation and performance will improve as a result.

### 6. Provide Agents With Comprehensive Information About The Customer



One of the biggest factors influencing handle time is how long it takes the agent to find relevant information to help the customer. Contact center software that integrates with business tools and provides comprehensive information about the customer in a unified workspace can significantly decrease average handle time and increase agent productivity. When agents have all the information they need pop up in the browser in front of them as the contact arrives, long gone will be the days of searching through multiple systems looking for the information they need to resolve the customer's issue.

## 7. Enhance The Contact Center Work Environment

The work environment of a contact center can significantly impact agent productivity. Loop Customer Management claims that their contact center floor layout directly impacts productivity. "There are no individual offices within Loop's sites and all staff, including the management and director teams, work within an open-plan environment. The benefits are clear, with Loop enjoying high retention, motivation, and empowerment resulting in performance improvements in our teams." So, the next time you have the opportunity to change your contact center layout, consider the impact that it can have on agent and team productivity.

## 8. Have A "Genius Hour"

One way to increase employee productivity is to make them more involved in creating improvements in processes and new workflow solutions. This will make agents feel their work has greater purpose. Best-selling author Daniel Pink suggests creating a "genius hour" every week has a positive impact on agent and contact center productivity as agents are more invested in their work and feel as though they are an integral member of the team.

## 9. Increase Awareness Of The Agent's Impact On End-Customers

Another strategy for enhancing agent productivity is to raise their awareness of their impact on end-customers. Dr. Adam Grant, a management professor at Wharton, conducted a series of studies to evaluate contact center agent productivity. He found that agents

exposed to the end-customer face-to-face increased their weekly phone time by an average of 142 percent and they raised 171 percent more money whereas agent who did not meet the end-customer had no change in results. Dr. Grant suggests connecting agents directly with end-customers, showcasing customer photos, sharing customer stories and having agents describe their own positive experiences with customers as all can increase productivity.

## 10. Provide Incentives And Rewards

The goals of an incentives and rewards program should be to motivate employees to perform optimally, foster personal growth and development, increase employee satisfaction with their work and keep talented employees from leaving. If successful, all of these will have an impact on productivity within the contact center. If you are interested in starting or revamping your employee rewards program check out these blog posts for helpful information.

- [The Basics of a Successful Employee Reward Program](#)
- [What You Should Know About Employee Recognition and Rewards](#)
- [What Every Manager Should Know About Rewarding Employees](#)
- [20 Ways to Increase Employee Motivation Using Rewards](#)
- [How to \(and Not to\) Shape Employee Behavior Using Rewards](#)
- [How to Measure the Impact of Employee Rewards on Performance](#)
- [The Top 8 Reasons Why Rewards Fail to Motivate](#)

Increasing agent productivity isn't as simple as asking them to work longer hours, take fewer breaks, or work on the weekends. It requires enhancing their engagement with their work, their perception of being a valuable member of the team, rewarding performance, encouraging them to take appropriate breaks, optimizing the software they use and streamlining business processes. If you can take a careful approach to tackling these focus areas, you can reap huge rewards in employee productivity.



## Conclusions

In order to be effective, enhancing contact center productivity must occur on different levels. Management must work to revamp training, enhance quality control practices, outsource non-core competencies, and allow agents to work from home. They should optimize their current contact center software solution or upgrade to a better solution that will streamline business processes and enhance agent productivity. They should also leverage business tools like a workforce management system, knowledge base and internal chat system (among others) to streamline business practices. Finally, they should work to increase agent productivity by enhancing their engagement with their work, their perception of being a valuable member of the team, rewarding performance, and encouraging them to take appropriate breaks. Taken together, all can have a huge impact on agent, team and contact center productivity.

### About Talkdesk

Talkdesk Enterprise Contact Center empowers companies to make customer experience a competitive advantage. With enterprise-class performance and consumer-like ease of use, Talkdesk easily adapts to the evolving needs of sales and support teams and

their end-customers, resulting in increased customer satisfaction, productivity and cost savings. Over 1,400 innovative enterprises around the world with thousands of seats, including IBM, Acxiom and Zumiez rely on Talkdesk to power their customer interactions. Learn more and request a demo at [www.talkdesk.com](http://www.talkdesk.com).

For more information, visit [www.talkdesk.com](http://www.talkdesk.com).



## Adaptive NICE Performance Management (NPM)

Using Adaptive NPM to Meet Your Business Goals: A Strategic Sampling

### About NICE

NICE (NASDAQ: NICE) is the worldwide leading provider of enterprise software solutions and is bringing about The End of Not Knowing by generating insight based on advanced analytics of structured and unstructured data. NICE solutions help the world's largest organizations deliver better customer service, ensure compliance, combat fraud and safeguard people. Over 25,000 organizations in more than 150 countries, including over 80 of the Fortune 100 companies, are using NICE solutions. [www.nice.com](http://www.nice.com)

"You have to be fast on your feet and adaptive or else a strategy is useless."

– **French general and statesman Charles de Gaulle (1890-1970)**

That is where Adaptive NICE Performance Management (NPM) solutions come in, ensuring that high-level business strategies are implemented on the ground in a way that draws out the very best in each employee. Adaptive analytics recognizes individual performance outcomes, skills, personal attributes and preferences (the “persona”), which are then assessed relative to other employees, tenure and task-specific requirements, in order to better shape performance demands, expectations and motivation. As de Gaulle might have said, had he been an HR professional instead of a French military icon, that’s the secret to effective workforce optimization.

Adaptive analytics have a vast array of uses. In this document we will take a look at a sampling of high-impact adaptive applications, who they affect in the contact center, and how they help achieve different contact center priorities.

## Reducing Attrition with Employee Engagement Employee

The goal of reducing employee attrition, or churn, can be approached from the other direction, with a focus on personalized employee engagement that promotes both retention and tangible performance results. Adaptive NPM’s Action Recommendations engine addresses this issue by dynamically assigning performance improvement actions from an employee-specific menu of options shaped by their own preferences.

Bringing an individual’s “persona” into the heart of performance management decisions, with Adaptive NPM, engages employees more deeply and directly. When they see their preferences reflected, either explicitly or more subtly, in the type of coaching, e-learning and gamification they experience, employee satisfaction increases. Moreover, NPM’s Adaptive Goals and Insights, with their underlying relative metrics, generate more effectively prioritized improvement activities to address given performance issues in a timely manner.

The result for the employee is more meaningful and faster professional development, alongside measurable performance successes, creating an enduring three-way win for the employee, the company and the customer.



**Practical and systematic measures for ensuring employee retention.**

## Employee Development Optimization

The total amount of time available to both supervisors and employees to focus on performance improvement in any given month is limited. Adaptive NPM makes sure that every hour counts, automatically adjusting development activities to suit the individual and to meet the changing needs of the organization.

Adaptive Insights enables precision guided, personalized identification of improvement opportunities based on the employee’s “persona”, while Adaptive Actions recommends an accordingly tailored sequence of actions drawn from its “action bank”. The selection of suggested actions is also influenced by performance-related Adaptive Goals, as defined in accordance with higher-level corporate objectives. Adaptive NPM’s versatility and responsiveness optimizes employee development activities, both from the perspective of the supervisor and of the agent.

Adaptive NPM can ensure that, for example, a supervisor’s 20 hours of coaching time per week focuses on those skills or knowledge that will yield the maximum impact for the organization. As the Adaptive Insights module obviates the need for much manual root cause analysis and Adaptive Actions suggests content for corrective action, supervisors are able to focus more time on the actual coaching, as opposed to preparations for it.



**Directing employee development efforts to the highest impact areas in a dynamic environment.**



## From Analytics to Employee

There is often a myriad of performance data flowing from an organization's front and back offices. Many companies turn to an intermediary such as a call center analyst, business intelligence manager or supervisor to parse the complex data analytics, making it understandable and actionable.

Adaptive NPM streamlines the process and makes it more effective, bringing actionable analytics directly to the boots on the ground - managers, agents and back office staff. The solution proactively maps analytics data to each individual and team, assigning goals, deriving insights and generating improvement actions adapted specifically to extract the best from each employee.

The Adaptive Goals, Insights, and Actions modules in NPM were purpose-built to harness highly granular workforce optimization data from speech and desktop analytics solutions. Both NICE Nexidia Analytics and NICE Desktop Analytics are fully integrated into Adaptive NPM, helping to shape goals, coaching workflows and gamification mechanics according to user-defined KPIs, and providing greater insight into scheduling adherence, process bottlenecks, desktop-based best practices and compliance.

Bringing those powerful adaptive insights and guidance to the individual employee's personal screen, in exactly the way they need to see them, is the ultimate operationalization of analytics data.

Adaptive NPM is a true analytics-to-employee solution for rapid, comprehensive and iterative performance improvement.



**Operationalizing analytics data, making it independently actionable for frontline or back office employees.**

## Rapid Supervisor Onboarding

Every day, by the nature of their position, supervisors have to keep an eye out for performance issues and handle remediation, when necessary. NICE NPM's Adaptive Insights capability instantly surfaces such issues, identifies their root causes, and offers recommended actions specific to the agent or team.

Such guided analytics, along with built-in step-by-step instructions for the use of NPM dashboards, reports and management tools, dramatically cuts down on the time and resources needed for supervisors to begin delivering results. They hit the ground running with Adaptive NPM automatically alerting them to emerging issues and making their next steps easy to understand. Consider a contact center that has a spike in activity, for example, requiring the onboarding of groups of supervisors all at once. Adaptive NPM makes it possible without the need for extensive shadowing or hands-on training programs, with commensurate results in terms of customer service and service level adherence.





**Guiding supervisors quickly and cost-effectively, especially during peak times in the contact center.**

## Agile Business Initiatives

Contact center executives or managers periodically adjust performance goals at the organizational or contact center levels, based on high-level strategic or tactical considerations. When those objectives cascade down the organization to specific teams and agents, adaptive analytics provides the targeted insight necessary to mobilize effective change.

The NICE NPM Adaptive Goals module automatically applies relative metrics, interaction type definitions, and employee “persona” data to tailor updated performance goals to each team and individual in the contact center. The new ground-level performance objectives remain fair and achievable, as they play their part in driving toward the higher-altitude strategic goals. The underlying metrics of Adaptive Goals also impact Adaptive Insights, shaping the way performance feedback is analyzed for more effective feedback and constant improvement.

Beyond personalized goal-setting, NPM can also leverage Adaptive Goals to prioritize inhouse and frontline tasks to best serve the new business initiative. Labor and resources are thus optimally allocated and actions automatically triggered to meet a given goal. For example, if CSAT becomes a new priority, then coaching time can be relatively increased for CSAT-related topics and decreased for, say, AHT.

The underweighted coaching area can still be addressed, however, via other tools such as e-learning and gamification.



**Mobilizing the entire organization for a newly defined business initiative or KPI-based objective.**





## Creating Exceptional Customer Experiences for a Smartphone-Centric World

### Bad Customer Service Is Bad For Everybody

And yet, many companies provide poor customer support

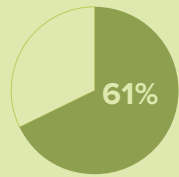
Perhaps this experience sounds familiar: You contact customer support in the hopes of resolving a problem but instead find yourself on hold, listening to a melodramatic '90s pop song. You wait, and wait some more before finally being connected to someone on the other end of the line. You introduce yourself, spell out your name, get transferred to another agent, and introduce yourself and your issue again, until the vicious cycle of repetition and lack of assistance places you in customer support oblivion.

Yes, most customer support today sorely needs an upgrade—a fast track into the digital age, where ultra-modern support experiences are increasingly in demand by customers across demographics. And Millennial and Gen Z users, who have increasing buying power, have particularly high expectations about having the to get things done anywhere, from any device.

Leading companies get this. They also recognize the growing importance of the customer experience on sales, retention and loyalty. And they know customer service and the customer experience are evolving as bigger differentiators than price and product. In fact, research shows that **companies rate customer service as the #1 important function contributing to the customer experience**, with 96% of organizations placing it under the “experience” umbrella.

On the flip side, bad customer service costs businesses **\$75 billion per year** in the United States alone.<sup>1</sup> To keep your company out of that group requires understanding what your customers want in a support experience.

Customer service and the customer experience are evolving as bigger differentiators than price and product.



The percentage of customers that go to competitors due to bad service.



It takes 12 positive experiences to make up for one unresolved negative experience.

Source: *Understanding Customers*, Ruby Newell-Legner

## What Customers Want: Convenience, Personalization and Efficiency

Brands like Nordstrom’s and Zappos have set the bar for modern customer service very high. So much so that most customers now expect every company they do business with to provide exceptional, personalized customer support.

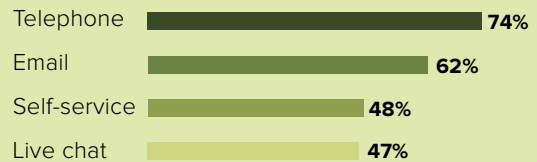
And when companies deliver on that expectation, it helps to deepen brand loyalty: 96% of respondents say customer service is important in their choice of loyalty to a brand.<sup>2</sup> Also, 86% of customers claim that a positive emotional connection with a customer service agent would make them more likely to do business with that brand again.<sup>3</sup>

Exceptional service includes providing customers with multiple, convenient and reliable ways to interact with the company, and resolving their service issues fast—ideally, on the very first call. In fact, more than 70% of customers identify fast resolution on the first contact as their top engagement priority.<sup>4</sup>

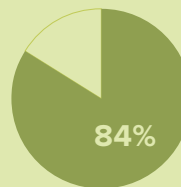
For most U.S. consumers—74 percent<sup>5</sup>—the telephone is the go-to tool for communication when contacting a business about service issue. However, support calls need to be *efficient*—and too many aren’t. The most common complaint from customers involves needing to repeat themselves as they move between touch points, confirming their aversion to difficult, impersonal interactions.<sup>6</sup> Obviously, that’s bad for customers and for business.

So, the pressure is on for companies and the customer care centers to step up their service, so they can meet increasingly high customer expectations for convenience, personalization and efficiency. But what’s standing in their way? Lack of data insights is one key obstacle, as the next section explains.

### Reaching Out: The 4 Top Tools for Customers Seeking Support



Source: *Microsoft State of Global Customer Service 2017*



84% of customers will pay more for a better customer experience.

Source: *American Express*

<sup>1</sup> Serial Switches Swayed by Sentiment: How Bad Emotive Customer Experiences Are Costing Brands Billions, NewVoiceMedia, 2018.

<sup>2</sup> Microsoft State of Global Customer Service 2017.

<sup>3</sup> NewVoiceMedia, 2018.

<sup>4</sup> CCW Special Report: Intelligent Customer Contact Workforce, June 1, 2018.

<sup>5</sup> Microsoft State of Global Customer Service 2017.

<sup>6</sup> Ibid.

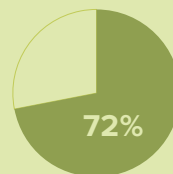


## A Two-Way Street: The Challenges of Improving Customer and Agent Support

Many companies lack the ability to access and leverage information that can help them improve the customer experience—even though that data is likely stored right within the organization.

For example, nearly two-thirds (66%) of consumers expect a customer service agent to know their contact information, product information and service history as soon as they engage with a brand for assisted service.<sup>7</sup> But this data is often housed in siloed systems and never makes it to the agent. That results in repetition and a lengthy information-gathering process, which increases handle times and decreases customer satisfaction.

Contact center agents, meanwhile, need training and modern knowledge tools to provide more efficient and personalized service. However, half of contact centers don't use a knowledge management system, which means their agents don't have access to the kind of information that could expedite call resolution.



**72% of consumers expect a customer service agent to know their contact information, product information and service history as soon as they engage**

Source: Microsoft State of Global Customer Service 2017

**\$75 BILLION**



**U.S. companies are losing an estimated \$75 billion per year due to poor customer service.\* Convoluted systems cause agents to dig for information that could help them solve customers' problems faster contribute to poor service.**

Source: NewVoice Media, 2018

<sup>7</sup> Microsoft State of Global Customer Service 2017.

## 4 Customer Service Areas That Need Improvement

### #1 Customer Interactions

- 80% of customers believe it takes some or too much effort to resolve their customer service issues<sup>8</sup>
- 56% of customers have stopped doing business with a brand due to a poor customer service experience<sup>9</sup>
- Lack of effective call routing leaves customers stranded or forced to start over

### #2 Technology and Integration

- Most call centers rely on dated, siloed technologies and stagnant knowledge repositories
- Integrations within systems like Salesforce, Zendesk and Kustomer are critical to making data available to agents when they need it

### #3 Channel Diversity

- Smartphone users prefer to use their phones for interactions, and text is a growing support channel
- Only 36% of contact centers have implemented multichannel integration to provide consistent experiences<sup>10</sup>

### #4 Agent Training And Retention

- 70% of contact centers do not train agents to support multiple channels<sup>11</sup>
- Half of contact centers do not offer an agent-facing knowledge management solution<sup>12</sup>
- Lack of access to data intelligence undermines agents' productivity, preventing them from delivering better outcomes and reducing their job satisfaction

## The Many Benefits of an Exceptional Call Center Experience

### Customer Benefits

- Shorter hold times
- Faster problem resolution
- No need to repeat personal information
- Resolve problems from anywhere
- Share information about issues easily

### Agent Benefits

- Customer data informs call from the start
- Access to customer data allows for personalization
- Contextual information decreases time to resolution
- Streamlined call wrap-up

### Company Benefits

- Increased customer loyalty
- Higher first-touch resolution
- Improved customer satisfaction ratings
- Reduced costs

## When a Company Provides Great Customer Service...

**96%** of customers say they would be more loyal<sup>13</sup>

**69%** would recommend the company to others<sup>14</sup>

**50%** would use the company more frequently<sup>15</sup>



**The probability of selling to an existing happy customer is up to 14x higher than selling to a new customer.**

Source: Marketing Metrics

<sup>8</sup> Ibid.

<sup>9</sup> Ibid.

<sup>10</sup> "Contact Centers Must Go Digital Or Die," Forrester, 2015.

<sup>11</sup> Ibid.

<sup>12</sup> Ibid.

<sup>13</sup> Microsoft State of Global Customer Service 2017.

<sup>14</sup> NewVoiceMedia, 2014.

<sup>15</sup> NewVoiceMedia, 2014.

## Solving Call Center Problems with Modern Technology

Legacy systems are often a root cause for customer care issues. These systems, which are often closed platforms, don't integrate with backend systems that store customer, product and order information.

Call center technology challenges:



Siloed data and disparate systems



Difficult to use and maintain



Data privacy and compliance issues

Also, call center technology is often piecemeal—and solutions are not built for integration. Most companies use at least five to 10 platforms to handle a range of customer interactions but lack the integration to improve the handling process for real-time interactions. These solutions include:

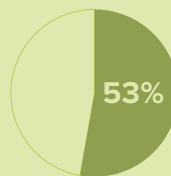
- Scheduling
- Recording
- Voice calls
- Chats
- Screensharing
- Photo and Video Sharing
- Reporting
- CSAT
- Texting
- And more ...

This list of single-purpose solutions reads like a list of functions you'd find in smartphones—powerful devices that are ubiquitous, always on, and ready for action.

Today, 90% of people have their smartphone within reach at almost all times.<sup>16</sup> And 75% of consumers say that they would rather use mobile customer care inside an app because it reduces time and hassle.<sup>17</sup> Also, 53% of customers say they would spend more money with a brand if they could switch channels or devices to continue a conversation, all without starting over and repeating their information.<sup>18</sup>

The challenge for organizations is integrating these preferred communications channels into a seamless experience. Unfortunately, more than 95% of mobile apps force the user to exit the app to get live assistance via phone, chat, messaging or email.<sup>19</sup>

### A Seamless Experience Can Help Drive Spending



**53% of customers would spend more money with a brand if they could switch channels or devices to continue a conversation without starting over and repeating their information.**

Source: *The Digital Disconnect, Contact Solutions, 2016*

<sup>16</sup> "America's Views on Mobile Etiquette," Pew Research Center, 2015.

<sup>17</sup> The Digital Disconnect, Contact Solutions, 2016.

<sup>18</sup> Ibid.

<sup>19</sup> Ibid.



## Committing to Next-Level Customer Support

To provide truly exceptional customer service, modern businesses must not only accommodate customers in multiple channels but allow them to communicate in text, audio, video and with screenshots. It is a challenging but critical step toward delivering consistent, delightful support experiences that your customers both want and increasingly expect — and will deepen their loyalty to your brand and help your business stand apart from the competition.

### Modern, Mobile Customer Experiences Include:

#### Instant verification

From fingerprint authentication to pre-populating contact info, agents get trusted data at the start of the call.

#### Text input

Type out an address, email, and more, knowing that the information is accurate and without error.

#### Payments

Cross-sell and upsell opportunities become seamless when customer information is delivered from payment systems already installed on a smartphone.

#### Immediate feedback

Sending, receiving, and verifying information is reliable and handled in real time.

#### Screenshots

For products that live on a screen, the ability to see what the customer is experiencing inside an app is invaluable to expediting service calls.

#### Real-time photo and video sharing

Most organizations offer a complete service experience over the phone. However, the ability to share photos and videos via smartphone technology makes it easier for both the agent and customer to come to a quick resolution—leading to a better experience overall.

### For Contact Center Teams

With a real-time dashboard, supervisors and admins have access to key metrics like agent aux codes, users queued, wait times, scheduled calls, an agent's speed to answer, chat durations, transfers, CSAT scores, and much more. These metrics can be instantly fed into relevant systems to ensure operational decisions are not based solely on historical data but rather on the real-time situation.

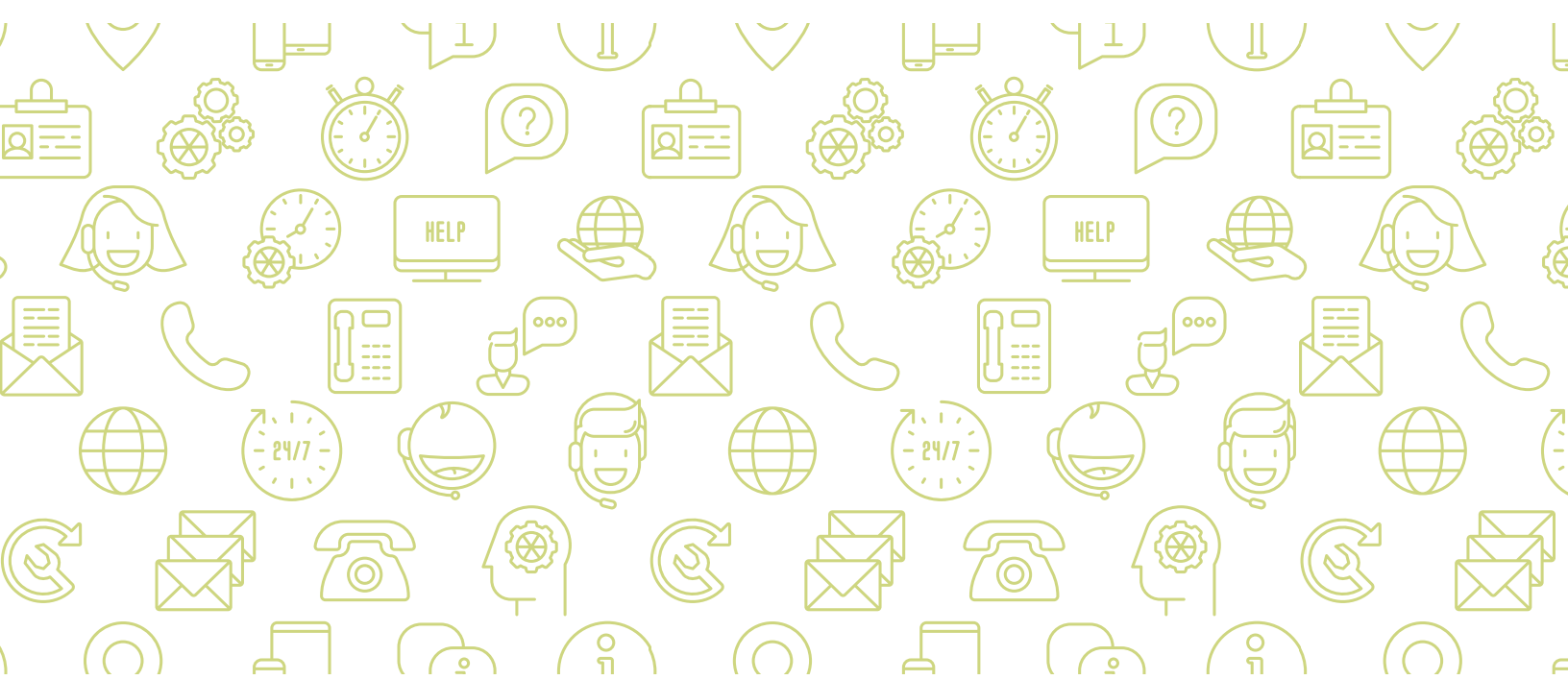
### For UX Developers

The UJET SDK sits inside your mobile app or website and integrates with your support CRM, so agents can field calls and chats directly from the browser with auto-ticket creation and utilize two-way sharing with the customer, so that nothing falls through the cracks.

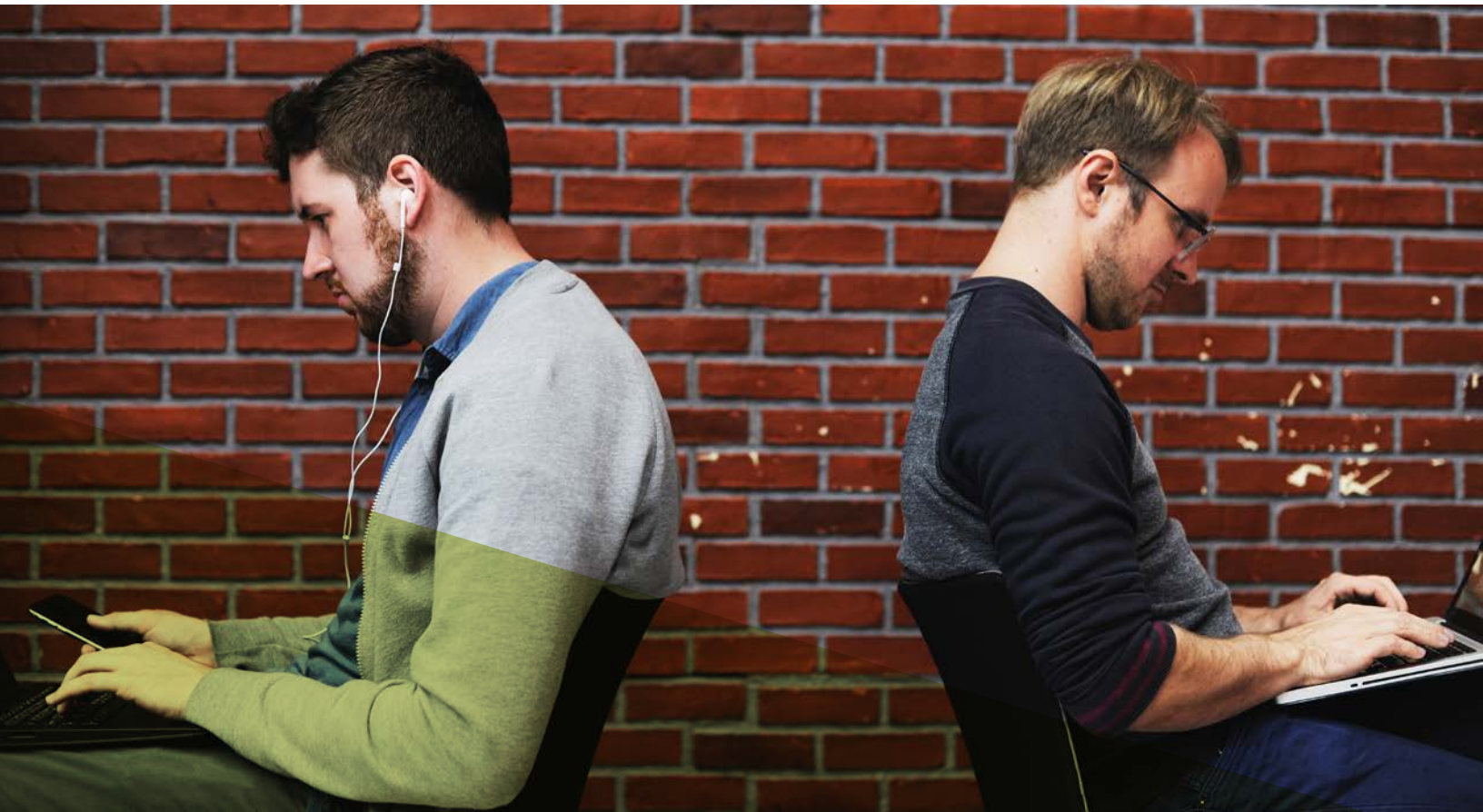
### About UJET

UJET is reimagining customer support with leading innovation to modernize the customer service experience. With a passion for improving the customer experience, our tools offer a multichannel solution for voice, web, text and mobile app support. Compliant with SOC2 Type II and HIPAA certifications, security and data protection are paramount to the success of our partnerships. Companies like Nest, Instacart, Postmates, Brex and GBM trust UJET to optimize and modernize customer support and offer global reliability, security and scaling across the world. Customer support must be seamless for the consumer, must empower agents with the best tools to solve problems and enable brands to present the best support experience possible. UJET is the only option for enterprise companies that want to future-proof support.

For more information about UJET or to see a product demo, visit [www.getujet.com](http://www.getujet.com).







## Digital Transformation and the Contact Center

How the right cloud migration strategies cut costs and improve flexibility

The following is an excerpt from our ebook 'Digital Transformation and the Contact Center: Creating an omni-channel CX strategy'. [Read the whole report here.](#)

Digital transformation (DX) has created huge opportunities for better customer experiences (CX). In 2019, communication remains a **top 3 cost center for IT managers** but DX is bringing about a shift in the role of IT, and communication has the potential to become a profit center for forward-thinking enterprises. No longer are CIOs and IT managers solely concerned by keeping operating costs of communication channels to a minimum. Instead, they are pushed by product,

marketing and sales teams to deliver cutting edge communications to the edge of their network, enabling:

- **New revenue generating opportunities** from the engagement of prospects and customers in the channels that are most convenient for them.
- **Omni-channel marketing initiatives** that enable the creation of a 360-degree view of customers by aggregating interactions from every channel.

- **New functionality for products and services** through embedding of native communications, such as number masking as a feature of Facebook Marketplace. In these instances, communications are becoming a core competency for products and services.

As a result of these reconfigured priorities, IT departments are tasked with seeking out constructive solutions to three core communications objectives:

1. Reducing cost by increasing operational efficiency
2. Increasing solution flexibility
3. Effectively leveraging communications across the entire organization

## Bringing The Contact Center Into The Digital Age

Even though most contact centers are incorporating channels beyond voice, the humble phone call remains the **customer service channel of choice in the US**, ahead of bricks and mortar, email, SMS, live chat, social media, community forums and chatbots. Voxbone's own **2019 survey of US consumers** shows two-thirds still prefer voice calls to text for customer support.

IT's focus shouldn't be trying to move past voice to chase the most cutting-edge digital channels, but identifying new opportunities to supplement core voice services only when it is appropriate and effective to do so. In other words, the impetus is on bringing the contact center into the digital age, not throwing out the fundamentals of what still works. And the best way to do this is by moving the core infrastructure of your voice and messaging services into the cloud.

## The Pillars Of Cloud Voice And Messaging Integration

While communication is viewed as an IT cost center, CIOs will always be tasked with finding innovative ways to increase operational efficiencies at the same time as making it easier for business functions to scale. This won't change. But what is changing is how communication is used throughout organizations, particularly when it comes to customer interactions.

Voice isn't going anywhere, but a continued reliance on the PSTN and traditional carriers will make it incredibly

difficult for businesses to scale effectively, particularly when the time comes to enter new markets. Another development is how contact centers themselves are increasingly staffed, with more organizations opting to hire virtual customer support staff, situated in remote locations.

**By migrating to a cloud model that delivers communications as a service (CaaS) and integrates voice directly into your contact center platform of choice (including in-house builds) via a modern protocol such as SIP, you can ensure reduced costs, improved efficiency and greater flexibility.**

### Reduce Costs

- ✓ **Save an average of 45%** on the cost of communications by moving delivery of service from the PSTN to SIP
- ✓ Reduce by as much as 63% **the operating expense** of your communications platforms by connecting them to your own cloud SIP trunks from a dedicated provider instead of bundling service
- ✓ Interconnect with the PSTN through a single cloud SIP connection instead of separate connections in every country to optimize downstream network architecture and reduce your SBC footprint

### Improve Efficiency

- ✓ Consolidate vendors across multiple locations via a single SIP connection to a global provider
- ✓ Centralize resource and compliance management via online tools or APIs
- ✓ Provision and manage services in real time via web & API

### Increase Flexibility

- ✓ Avoid the need to forecast or manage capacity with scalable, elastic services
- ✓ Get set up in minutes without the need for expensive hardware. All you need to get to get started is an identifiable endpoint to and from which your call traffic will be routed
- ✓ Enjoy new features and services as they become available with the 'as-a-service' cloud model



## Things To Consider When Setting Up A Cloud Contact Center

There used to be a time when a business could strategically position a couple of desks, plug in a phone or two, and they had themselves a contact center. Not anymore. Now, even the most basic contact center requires communications infrastructure, hardware, software and agents.

When considering communications infrastructure, there are several options for setting up a contact center:

- ✓ **Premise-based:** On-site hardware & legacy carrier agreements
- ✓ **Hybrid:** A mix of premise and cloud-based systems
- ✓ **Communications as a Service (CaaS):** Cloud infrastructure integrated with a separate CC platform
- ✓ **Contact Center as a Service (CCaaS):** CC platform hosted in the cloud that bundles infrastructure

Companies running legacy systems are faced with the huge task of setting up and managing their infrastructure in every country they operate, meaning separate contracts with national or regional providers, complicated billing and inflexible management of on-site hardware in all their locations.

Moving to a cloud solution brings with it many benefits, including increased flexibility and operational efficiencies, opening doors to system integrations and rapid security/feature upgrades. But decoupling your platform from your infrastructure allows you to unlock even greater cost savings and efficiencies, particularly as your operations scale. This is also the most effective way of ensuring you fully replicate the functionality of your legacy systems and the PSTN in the cloud.

## Migration To The Cloud

Unless you are a digital-native business, chances are you are going to have some sort of legacy systems in place. The shift to cloud communications has been a major cornerstone of DX initiatives. One of the strengths of a CaaS approach is that this voice infrastructure can be easily run alongside your legacy systems.

The benefit of CaaS is that it enables you to migrate your communications to the cloud at the right speed for your business. You can mitigate risk by running small-scale trials of SIP-based communications, then gradually move over your communications one location or platform at a time.

## Best Practices For Setting Up A Contact Center

When setting up a communications infrastructure for a cloud contact center, the key requirement is for stable, long-term guaranteed quality and availability of service. Security is also a major consideration. This requires the use of fully-compliant communications services that are built on top of a robust, reliable global backbone, with interconnections to the PSTN in every country where you have customers.

When choosing a CaaS provider to integrate with your contact center platform, you're likely to be thinking about connectivity, network presence, security and reliability, coverage, quality and cost.

## Vendor Consolidation

IT is under constant pressure to improve communications efficiencies while lowering costs, which is why the vendor consolidation promised by cloud communications is so alluring to businesses. Contact centers operating across multiple regions or countries can massively cut their billing footprint, freeing up significant resources in legal and finance teams. The ability to manage cloud communications infrastructure remotely also means that one engineer can do from a single site what several dedicated remote teams would need to do with legacy systems.

It's no surprise, then, that you can **save as much as 45%** on the cost of your communications by moving from the PSTN to cloud SIP trunks.

If your business is undertaking a digital transformation initiative and you're considering moving your contact center to the cloud, **Speak to Voxbone** today or read our **full ebook here**.



# Appendix



## Digital Consumers and their Relationship with Brands

Today, there is no more burning issue for a company's decision-makers than digital transformation. Becoming digital is the core mandate for IT leaders in operations, customer service, and global marketing. However, there's no project that can take a company from its present status to full digitalization in one fell swoop. On the contrary, digital transformation is a series of small projects that will eventually allow a company to evolve and compete in the digital era. Although these projects may vary widely according to the industry, many of them have one thing in common: they all must improve customer experience since this is one of the main distinguishing factors for companies now and in the future. To learn more, [click here](#).



## The CIO's Quest for Compliance

CIOs have a lot on their minds, from managing teams and implementing new technologies to strategic planning and process improvements.

So with all this on the go, how can they keep compliance as a top priority in order to avoid the regulatory pitfalls of corporate communication? [Learn more](#).

## Scaling Business Communications for a Better Global Presence

Migrating legacy communications to a cloud-based solution can be a full-time headache for CIOs and IT managers if they aren't fully prepared. But doing it properly can unlock significant operational efficiency gains and greater scale.

What regulatory, infrastructure and channel obstacles is your business likely to face? And how best do you cost-effectively navigate them? [Learn more](#).



## Driving continuous Improvement at EE

EE has realized a dramatic ROI with the NICE Performance Management (NPM) solution. See the numbers and hear from EE's team!

## NICE Performance Management: Game Changer for U.S. Bancorp

As an ISO-certified organization handling shareholder servicing for more than 200 mutual fund companies around the country, U.S. Bancorp Fund Services is fueled by continuous improvement. The organization turned to NICE Performance Management (NPM) to enable transparency into coaching and enable agents to self-improve. Watch the video to learn more.

## 2019 Editorial Calendar

### MARCH

#### Market Study: Contact Center Success for the Automation Age

March 25, 2019



### MAY

#### CCW Online: Contact Center Success for the Automation Age

May 21-22, 2019 at 12PM ET

Register for FREE ▶

### AUGUST

#### Market Study: Trends in Customer Experience Design & Strategy

August 12, 2019

Coming Soon

### SEPTEMBER

#### CCW Online: Trends in Customer Experience Design & Strategy

September 17-18, 2019

### NOVEMBER

#### Market Study: Contact Center 2025 – A Roadmap

November 4, 2019

Coming Soon

### DECEMBER

#### CCW Online: Contact Center 2025 – A Roadmap

December 3-4, 2019

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