CCW
CUSTOMER CONTACT WEEK DIGITAL

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MARKET STUDY

NEW STANDARDS FOR CUSTOMER CONTACT PERFORMANCE

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NEW STANDARDS FOR CUSTOMER CONTACT PERFORMANCE

The world of customer contact was already changing dramatically. New channels were altering the way brands interacted with customers. Automation was redefining the role of customer engagement employees. Cloud solutions and generational shifts were reshaping conceptions about the traditional contact center environment.

As they wrestled with the ramifications of these dramatic transformations, companies big and small encountered another sudden impetus for change: the novel Coronavirus pandemic (COVID-19).

The source of significant health concerns, mandatory quarantines, widespread business shutdowns and crippling senses of fear and uncertainty, COVID-19 dramatically impacted the way contact centers established their goals, managed employees and interacted with customers.

No, the requisite changes were not necessarily a departure from what contact center leaders were already considering. Many leaders already had actions like connecting in digital channels, leveraging automation and turning to remote work on their dockets.

COVID-19 did, however, markedly elevate the urgency of these actions. Although many organizations were toying with unconventional work arrangements and new self-service solutions, few were taking meaningful action. COVID-19 left them with no choice. As a result, it prompted contact centers to not only immediately address these big trends but prepare for the performance impact. They had to answer some key questions:

- How are customer expectations changing?
- How do we integrate digital engagement and self-service options into our CX journeys?
- What does omnichannel mean for our performance goals and metrics?
- How can we keep remote agents engaged and productive?
- What factors will prevent agents from feeling comfortable, let alone satisfied, in these uncertain times?

Earlier this spring, CCW Digital surveyed customer contact leaders to determine how they were answering these questions. It pointedly asked what contact centers were doing to maintain (and improve) their performance levels in these trying times. It, moreover, worked to determine how the notion of a successful contact center will change in the months and years ahead.

This market study explores the results of our inquiry.

METHODOLOGY & DEMOGRAPHICS

To collect data for this investigation, CCW Digital launched a survey in March 2020. The survey attracted global respondents responsible for overall leadership, contact center, customer experience, marketing, operations, sales, human resources, information technology and product development in their respective organizations.

Example respondent titles included director of product, head of customer experience, director of member experience, chief executive officer, chief operating officer, vice president of operations, manager of client support, quality assurance lead, digital manager, vice president of customer support, engagement leader and vice president of patient services.

Respondents came from a myriad of organizations across all industries, ranging from global, Fortune 500 brands to niche, regional enterprises. Thirty-seven percent (37%) of respondent companies have over 1000 employees, but nearly 50% employ under 500.

ABOUT THE AUTHOR

Brian Cantor
Principal Analyst, CCW Digital
Customer Management Practice

CMP CUSTOMER MANAGEMENT PRACTICE

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 FINDINGS

1 Agent effort is top-of-mind for today's contact centers. They identify the lack of an integrated agent desktop as their leading productivity challenge, while also flagging insufficient context about customers and inadequate automation investments as operational bottlenecks.

2 There is no singular answer to how COVID-19 is affecting interaction volume. Although some organizations report a substantial increase in inquiries, many report a significant decrease.

3 Granted, volume may not be the best way to measure how the pandemic is impacting customer interactions.

4 Many companies are increasing their emphasis on metrics like CSAT, customer retention, uptime and digital engagement amid the COVID-19 pandemic.

5 Wait time and average speed of answer are retaining their importance in many organizations, but others are questioning whether they matter as much in today's world.

6 Predictably, the most common response to COVID-19 is increasing the emphasis on at-home work. Remote collaboration tools and digital channels are also firmly on the contact center radar.

7 As they prepare for an increase in digital engagement and self-service, companies are preparing for a corresponding impact on phone volume. They are also looking at ramifications for compliance and metrics.

8 The biggest challenges with remote work include connectivity issues, maintaining real-time engagement and equipment problems.

TOP CHALLENGES: WHY CUSTOMER CENTRICITY ELUDES CONTACT CENTERS

Reducing customer effort. Growing customer loyalty. Creating a seamless omnichannel experience. Improving agent satisfaction.

The customer contact community does not conceal its aspirations. It does not refrain from making an enthusiastic commitment to customer centricity.

Achieving these objectives, on the other hand, remains an elusive notion. Companies consistently struggle to turn their customer-centric ideologies into customer experience realities, and customers are well aware. Despite hearing all the hype about customer centricity, only 12% of customers have seen meaningful improvements to their experiences with brands. They continue to face the same inefficiencies and pain points. They continue to endure the impact of poor contact center performance.

The recent Coronavirus pandemic is only exacerbating the challenges and illuminating the shortcomings. The inhibitors that prevented contact centers from serving customers in a stable, economically upbeat environment are even more taxing in an atmosphere of worry and uncertainty.

As brands work to retain customer trust, improve agent engagement and establish competitive advantages, they cannot afford to let these challenges linger.

When it comes to the most urgent challenges, none affects more contact centers than convoluted systems. **Thirty-eight percent (38%) of companies say their agents struggle due to the lack of an integrated desktop.**

Other top challenges include agents not receiving enough context about **customers (33%), insufficient use of automation (33%), the absence of a 360-degree view (32%)** and **agents spending too much time on low-value work (32%).**

The top five challenges are all united by a common theme: agent effort.

When agents lack real-time insights about customers, cannot easily navigate between channels or cannot access relevant knowledge and tools from a single screen, they have to exert additional effort. This time they spend searching for information and accessing different systems comes at the expense of the customer experience. It also drives *agent* frustration, leading to disengagement and poor productivity.

Organizations that are not successfully leveraging automation cannot mitigate these concerns. They also cannot recalibrate workflow so that agents only focus on high-value work. In turn, agents spend too much time on *unimportant* tasks, further impacting efficiency and agent satisfaction.

Which of the following are meaningfully impacting your customer contact performance (including, but not limited to, your situation amid the Coronavirus pandemic)?

Don't have enough resources overall
27.63%

Don't have enough resources for digital/new channels
26.32%

Agents are not receiving proper training/coaching/support
17.11%

Agents are not good/personable enough for the higher standard of CX
14.47%

Agents lack a 360-degree view of customers
31.58%

Agents spend too much time on simple/unimportant work
31.58%

Knowledge bases/CRM/etc are out-of-date or hard-to-use
27.63%

Agents don't easily receive context about customers prior to or during call
32.89%

Agents lack an integrated desktop for performing tasks across channels
38.16%

Customers don't trust digital or automated channels, creating more volume for agents
22.37%

Don't have accurate voice of the customer insights
13.16%

Bad processes (agents spend too much time asking the wrong questions, performing the wrong actions, etc)
14.47%

Ineffective workspace or equipment
26.32%

Outsourcing partners don't meet performance standards
7.89%

Not using work-from-home (and should be)
15.79%

Using work-from-home (and it's not effective)
13.16%

Not automating enough processes/interactions
32.89%

Automation tools aren't successful / may be adding complexity
15.79%

SUDDEN IMPACT: HOW CORONAVIRUS IS IMPACTING VOLUME

Given its transformative impact on all of society, the COVID-19 pandemic carries obvious ramifications for the customer experience.

Whether adapting to economic uncertainty or mandated social distancing practices, many companies are fundamentally changing their offerings. They are canceling reservations, changing their practices, nixing certain products and even outright shutting down operations. They are also rethinking their contact center strategies.

These *all* impact the journey for customers, who may have new questions and concerns as they navigate these challenges. Customers may also be enduring high-stakes personal consequences, such as health issues, inability to work and losses of disposable income.

Collectively, these factors *all but guarantee* shifts in customer contact volume. The changes will not, however, be uniform across all industries.

Roughly 51% of companies, for example, report a decrease in contact volume since the dawn of the COVID-19 outbreak. About 21% confirm a decrease of at least 50%.

Thirty-two percent (32%) of companies, on the other hand, fall toward the other end of the spectrum. They are seeing an influx in contact volume.

The discrepancy makes sense. With fewer consumption options thanks to social distancing, customers will not need to interact with as many brands. Some brands, in turn, will witness a decrease in volume.
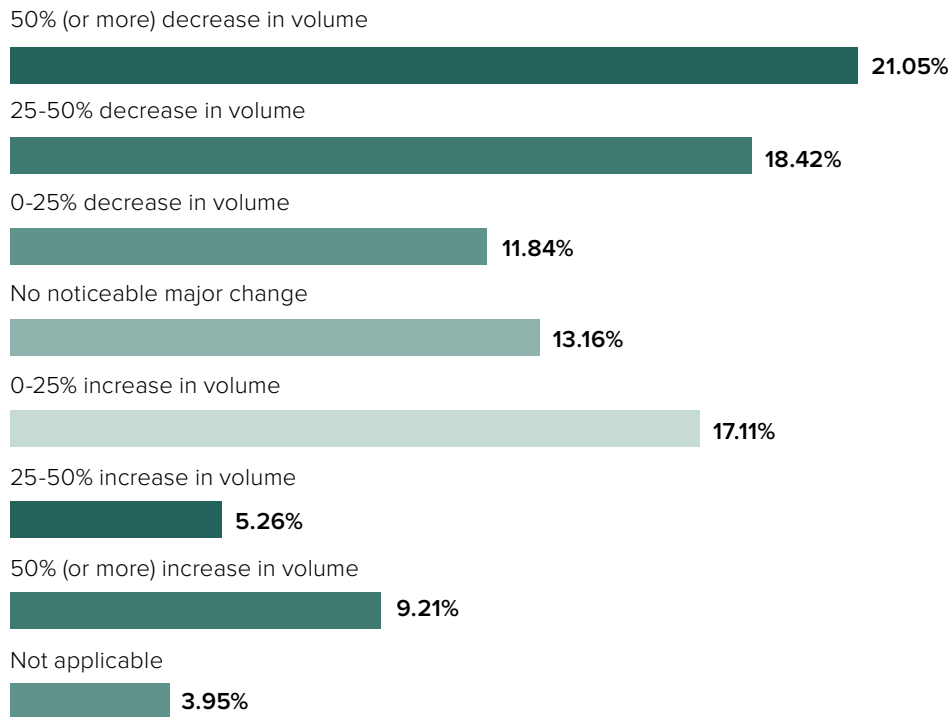
Renewed customer priorities will accelerate this decrease. With more pressing concerns to address and with knowledge that certain processes are going to be imperfect, customers may be less apt to seek support for simple, transactional issues. Fearing long wait times, they may also pursue autonomous options for basic issues; not all companies track (or even can track) self-service as "volume."

Companies with a more direct connection to the Coronavirus outbreak, on the other hand, may see a surge of volume. Telehealth providers will see an influx of calls from customers concerned about their well-being. Hospitality and logistics companies will have to address cancellations or delays in their offerings. Financial institutions, including banks and debt collectors, will field inquiries from customers who fear an inability to make payments.

When considering COVID-19's impact on contact volume, it is also important to look beyond the number itself. As customers navigate a changing world, they will have different preferences, expectations and emotions. In many cases, they will seek more custom and empathetic support.

It is imperative for companies to ensure preparedness for this qualitative shift in customer demands. Just because they are fielding fewer chats and calls does not mean the customer experience will be less taxing on their resources.

How has total customer interaction volume changed for YOUR organization in the wake of the Coronavirus pandemic?

50% (or more) decrease in volume

21.05%

25-50% decrease in volume

18.42%

0-25% decrease in volume

11.84%

No noticeable major change

13.16%

0-25% increase in volume

17.11%

25-50% increase in volume

5.26%

50% (or more) increase in volume

9.21%

Not applicable

3.95%

RETHINKING PRIORITIES: WHAT METRICS MATTER MOST?

If customer demands, agent workflow and the greater business climate are all changing, then so too will contact center objectives and standards. Contact centers, in turn, will need to rethink their performance metrics.

One common area of change involves increasing the emphasis on certain metrics. CSAT, uptime, customer retention, self-service utilization and digital utilization fit this bill, transitioning from already-important metrics into top priorities for many organizations.

The renewed emphasis on these metrics makes sense. CSAT and customer retention speak to the importance of being a trusting, supportive partner for customers during these trying times. With customers worrying about their livelihoods, they are seeking brands that are empathetic yet resolute in their communication. They will pledge their long-term appreciation to brands that "show up" for them in this time of need.

By holding the contact center accountable for CSAT and retention, companies encourage this pro-customer attitude. They let functional leaders and frontline employees know that the substance of each interaction matters. They may not have the ideal answer for each customer, but they need to communicate their message in a way that builds trust and long-term loyalty.

Not simply a commentary on the "urgency" behind customer communication, the emphasis on uptime also reflects awareness of the new contact center normal. Contact centers need to ensure their transition to remote work and digital communication does not come at the expense of the customer. If systems and agents become harder to access at a time when customers need them most, the brand will endure long-term damage.

To remain consistently responsive in the face of unpredictable call volume, many companies are shining the spotlight on their digital and self-service channels. Some are encouraging, if not outright forcing, customers to use these new options. Measuring utilization of these channels is important for determining whether the efficacy of these platforms, as well as messaging about why they are valuable for customers, is up to par.

Although they are not *gaining* importance in all organizations, **metrics like wait time, return on learning and average speed of answer are retaining their significance in today's climate.**

Wait time and ASA simultaneously reflect how seriously a brand is taking its customers' issues and how well it is leveraging internal resources. They are thus ideal metrics for today's climate, in which contact centers have to ensure changes in work environment, issue type and channel are not causing a disruption in service capabilities.

Aware that agents will have to learn new systems, prepare for new issues, find comfort in new environments, develop enhanced skill sets and even cross-train for new responsibilities, coaching is vital for many organizations. Return on learning, therefore, retains its importance for customer contact leaders. To sufficiently prepare and upskill their workforce, contact centers will need to hold their development programs accountable for speed, efficacy and personalization.
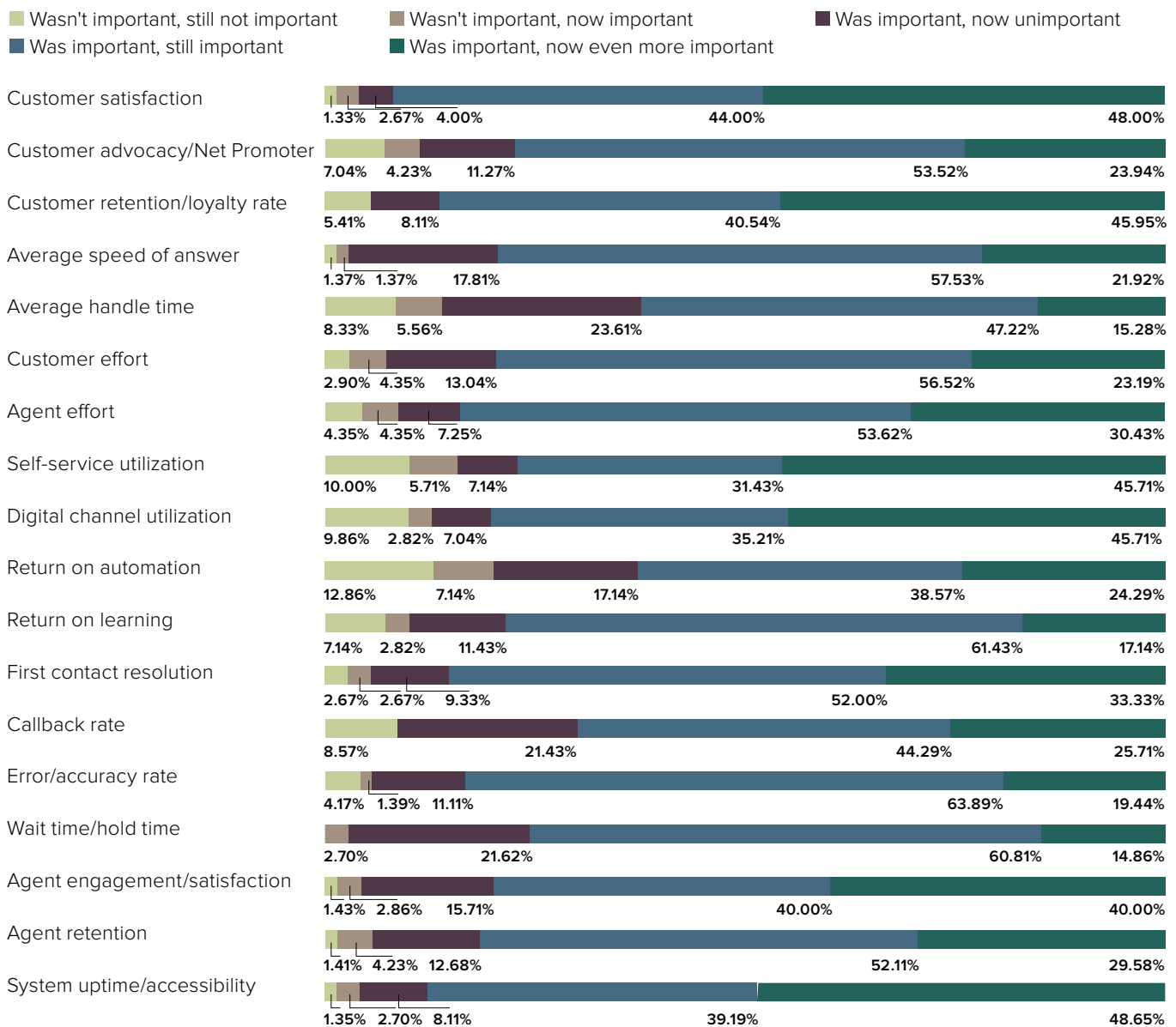
Sensing that customers may be more tolerant of delays in today's climate, **not all organizations agree that wait time and average speed of answer carry as much relevance. Other metrics that are losing importance amid the COVID-19 pandemic are callback rate, return on automation and average handle time.**

Fearing that it may force agents to rush through interactions, the customer contact community has long questioned average handle time. The recent emphasis on empathetic, "human" interactions exacerbates these concerns. The last thing many brands want to do is dismiss customer needs and questions in a time of crisis.

Although contact centers clearly want to provide support so sufficient that customers do not need to call back, the callback rate metric may seem out of place in today's environment. Given the unpredictability of today's environment, it is impossible to pre-empt all future issues on a single call. And even if they could anticipate everything, brands that aim to be a trusted partner for their customers may object to viewing follow-up calls in a negative light.

Companies may be leveraging more automation in the wake of the Coronavirus epidemic, but they are not necessarily obsessing over their "return" on that automation technology. As they work to minimize the impact of change and plug existing workflow gaps, they may not be ready to scrutinize this technology. They are correcting immediate problems rather than paving the way for long-term transformation and value.

Which of the following metrics/outcomes were priorities for your contact center prior to the Coronavirus situation? What about now?

Legend:
- Wasn't important, still not important
- Wasn't important, now important
- Was important, now unimportant
- Was important, still important
- Was important, now even more important

Customer satisfaction
1.33% | 2.67% | 4.00% | 44.00% | 48.00%

Customer advocacy/Net Promoter
7.04% | 4.23% | 11.27% | 53.52% | 23.94%

Customer retention/loyalty rate
5.41% | 8.11% | 40.54% | 45.95%

Average speed of answer
1.37% | 1.37% | 17.81% | 57.53% | 21.92%

Average handle time
8.33% | 5.56% | 23.61% | 47.22% | 15.28%

Customer effort
2.90% | 4.35% | 13.04% | 56.52% | 23.19%

Agent effort
4.35% | 4.35% | 7.25% | 53.62% | 30.43%

Self-service utilization
10.00% | 5.71% | 7.14% | 31.43% | 45.71%

Digital channel utilization
9.86% | 2.82% | 7.04% | 35.21% | 45.71%

Return on automation
12.86% | 7.14% | 17.14% | 38.57% | 24.29%

Return on learning
7.14% | 2.82% | 11.43% | 61.43% | 17.14%

First contact resolution
2.67% | 2.67% | 9.33% | 52.00% | 33.33%

Callback rate
8.57% | 21.43% | 44.29% | 25.71%

Error/accuracy rate
4.17% | 1.39% | 11.11% | 63.89% | 19.44%

Wait time/hold time
2.70% | 21.62% | 60.81% | 14.86%

Agent engagement/satisfaction
1.43% | 2.86% | 15.71% | 40.00% | 40.00%

Agent retention
1.41% | 4.23% | 12.68% | 52.11% | 29.58%

System uptime/accessibility
1.35% | 2.70% | 8.11% | 39.19% | 48.65%

CRISIS RESPONSE: HOW ARE COMPANIES REACTING?

Whether due to government mandates, common sense or strategic foresight, companies are radically transforming their customer experience journeys in response to COVID-19. They are rethinking how they staff agents, how they manage workflow and how they use technology.

Most notably, they are leveraging the work-from-home model. **Approximately 80% of companies say they have increased their emphasis on remote work,** making it a near-universal response to the crisis.

Other popular responses include **increasing use of collaboration tools (66%), leveraging digital channels (53%), increasing proactive engagement (53%)** and coaching **agents to demonstrate empathy and other human qualities (50%).**

Each measure marks an intuitive, if not downright obligatory, response to the Coronavirus crisis. Thanks to strongly advised or even mandatory quarantines, most companies have no choice but to increase their use of at-home labor. In reality, the only businesses *not* responding in this fashion are either those for which on-site staff is essential, those that are ceasing operations amid the pandemic *or* those that already had at-home programs.

As the workforce stays home, remote collaboration tools like Slack, Microsoft Teams and Zoom become essential. They help at-home employees replicate the real-time training sessions, meetings, collaborations and conversations they would ordinarily be having in the office.
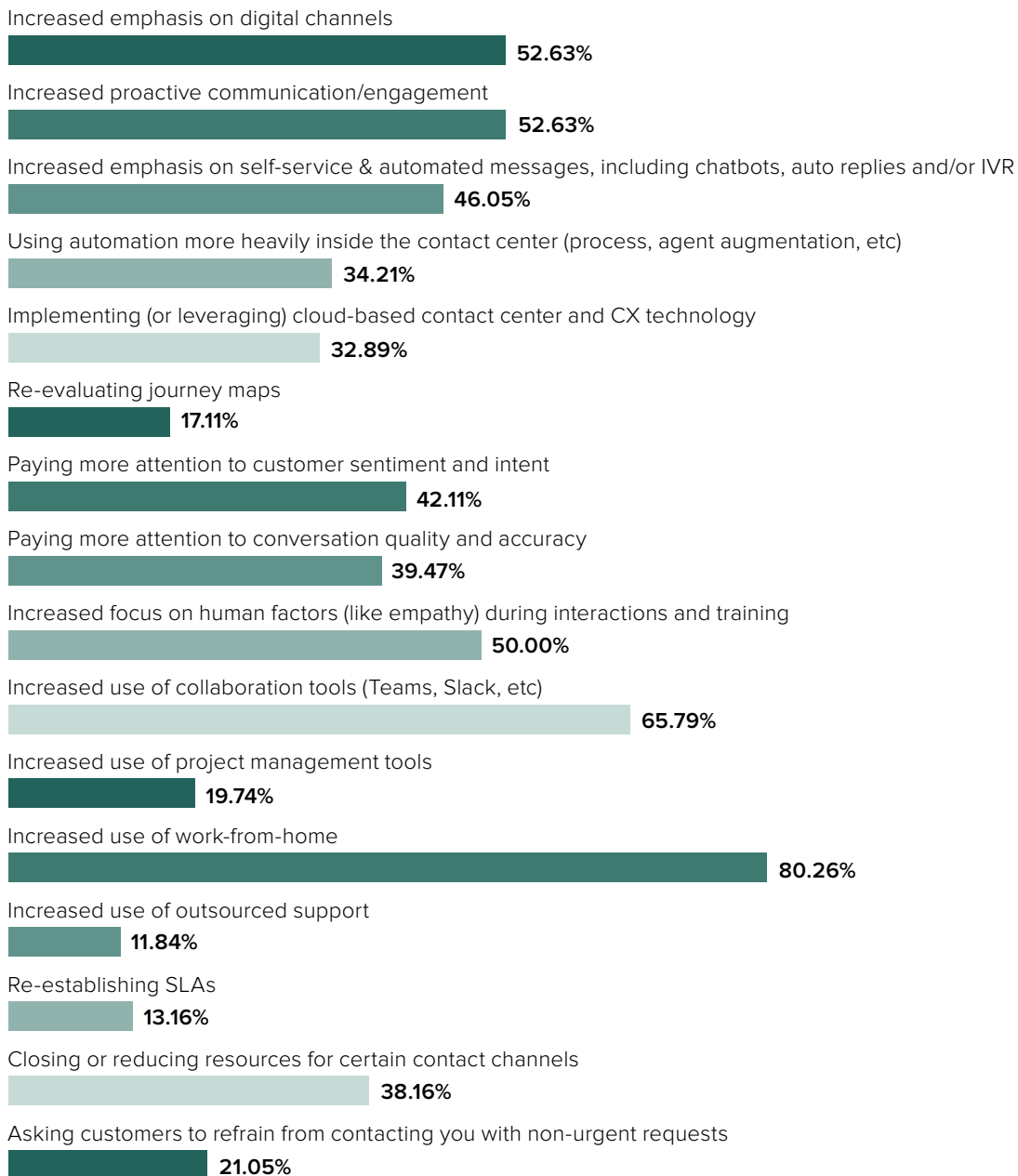
Along with helping to manage volatile call volume, digital channels help address two important aspects of the work-from-home environment: quality and compliance. With many at-home agents relying on personal cell phones and overloaded Wi-Fi networks, they may not be able to provide reliable support over the phone. Customer privacy laws, moreover, may *prevent* them from talking with customers in homes they share with non-employees. Digital communication is an effective way to overcome these challenges (granted, it also introduces data compliance challenges of its own).

By solving problems and answering questions before customers think about making contact, proactive engagement offers a similar benefit. It also demonstrates the brand's appreciation for its customers' time and peace of mind. A gym chain that is proactively alerting customers that it will be freezing memberships, as an example, takes one extra worry off customers' plates.

Proactive engagement and successful digital self-service offerings will not, however, completely eliminate interaction volume. Customers will have *unusual* questions and requests that are too complex for many digital environments. They may also want to speak to a live agent during these difficult times. Mindful of this reality, half of companies are preparing their employees to provide more "human" conversations with customers. Whether over the phone or in a chat window, these empathetic agents will ease short-term worries and build long-term loyalty.

It may have taken a crisis for companies to initiate work-from-home programs, purchase collaboration tools and better leverage digital channels, but these efforts need not cease once the pandemic eases. Each endeavor fundamentally improves the customer and/or agent experience, and thus makes sense as a year-round policy in many organizations.

Which of the following actions are you taking/have you taken to handle the recent outbreak?

Increased emphasis on digital channels
52.63%

Increased proactive communication/engagement
52.63%

Increased emphasis on self-service & automated messages, including chatbots, auto replies and/or IVR
46.05%

Using automation more heavily inside the contact center (process, agent augmentation, etc)
34.21%

Implementing (or leveraging) cloud-based contact center and CX technology
32.89%

Re-evaluating journey maps
17.11%

Paying more attention to customer sentiment and intent
42.11%

Paying more attention to conversation quality and accuracy
39.47%

Increased focus on human factors (like empathy) during interactions and training
50.00%

Increased use of collaboration tools (Teams, Slack, etc)
65.79%

Increased use of project management tools
19.74%

Increased use of work-from-home
80.26%

Increased use of outsourced support
11.84%

Re-establishing SLAs
13.16%

Closing or reducing resources for certain contact channels
38.16%

Asking customers to refrain from contacting you with non-urgent requests
21.05%

THINKING LONG-TERM: HOW WILL DIGITAL AND AI IMPACT THE CONTACT CENTER

Companies began taking noteworthy action in the spring of 2020, but they were *already* talking extensively about the digital transformation in the months and years prior. Digital transformations, omnichannel revolutions, self-service investments and artificial intelligence deployments have long ranked as top contact center ambitions.

As they were preparing for these digital initiatives (and, now, as they are witnessing their digital initiatives at work), companies were surely thinking about the ramifications for their greater business.

How will a serious investment into digital capabilities transform the contact center dynamic? How, specifically, will the rise of automation impact agent workflow? How will exposure to new channels change customer expectations?

Companies have diverse answers to these questions, but there are some comparatively common responses.

Fifty-four percent of companies (54%), for example, anticipate an increase in self-service.

Other common forecasts involve **phone volume dropping for everything but complex issues (38%), heightened scrutiny around digital privacy and compliance (36%), new metrics for digital channels (33%), digital-specific training and staffing (32%)** and **better use of "digital" functionality during interactions (32%).**

With AI yielding bots that can weave seamlessly into the customer journey, understand natural language, detect intent, answer meaningful questions, intelligently route customers and become smarter in real-time, the days of self-service being a synonym for "frustrating IVR" are coming to an end. As consumers learn that self-service is becoming a more viable, more legitimately customer-centric option, they will actively *choose* to resolve problems on their own.

Since they acknowledge that reality, many companies accordingly expect fewer customers to call with simple, transactional issues. They anticipate the phone becoming the clear option for the complex, more emotional interactions that customers *cannot* address via self-service or text-driven conversation channels.

Although digital communication offers some inherent security and privacy benefits over traditional conversations, it also possesses some clear vulnerabilities. More than that, the business community remains unclear about how certain privacy and compliance issues translate to the digital world. Navigating these challenges will be a big part of the digital transformation.

Establishing metrics and preparing staff will also warrant considerable focus. Since digital communication is fundamentally different from phone communication,
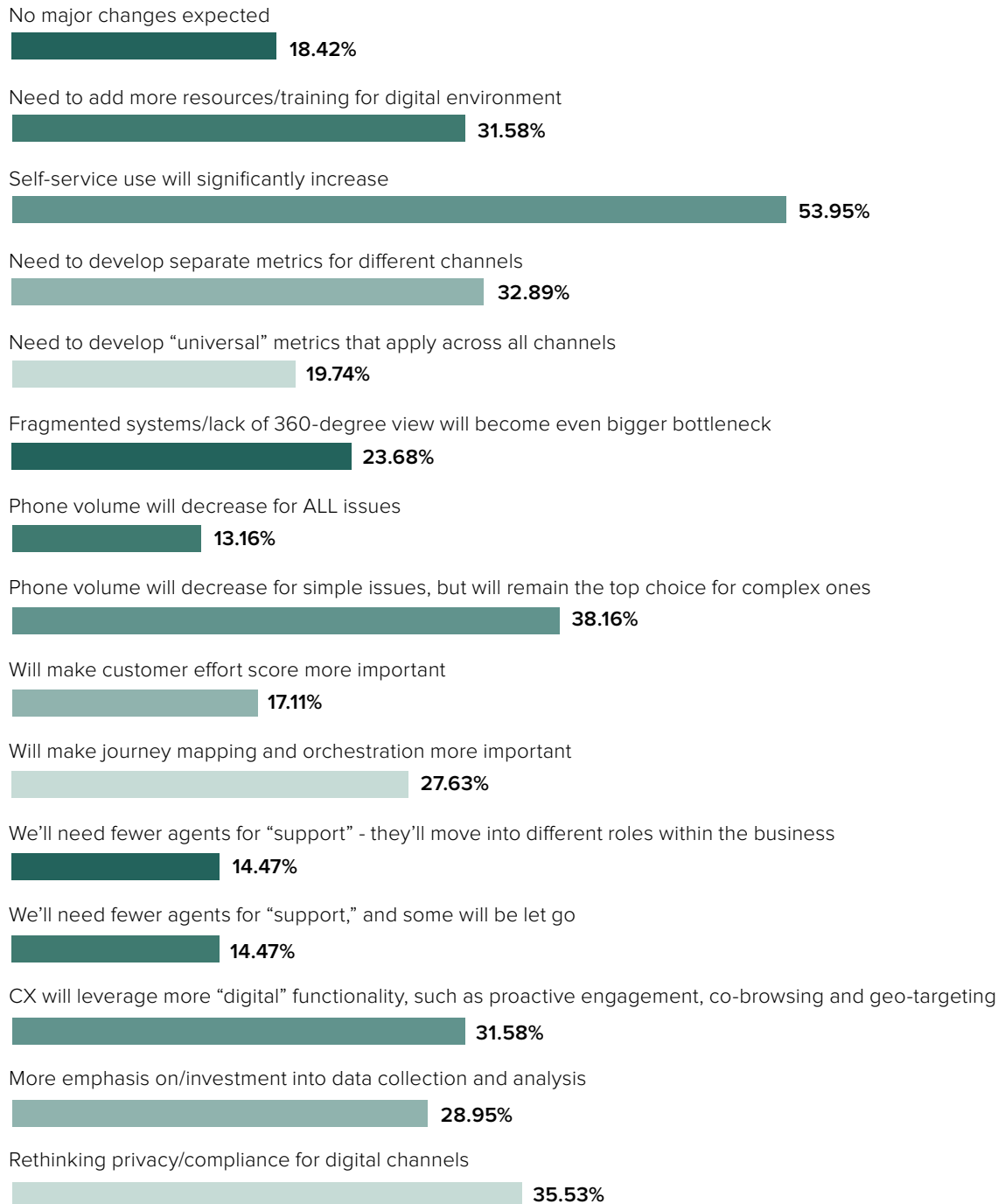
traditional contact center metrics may not apply. Messaging, for example, is very much sold on its support for asynchronous engagement in which customers and agents do not have to complete a conversation in one sitting. A common contact center metric like average handle time (AHT) — at least in its traditional sense — would obviously be of no use in that situation.

These different channels will also require different communication skill sets, if not different agents altogether. Companies will need to address this reality, considering issues like "single-channel agents vs. cross-channel employees" and "channel-specific training vs. broader company training."

Not content with merely *offering* digital channels as a substitute for voice, 32% of companies want to tap into the unique strengths of their new media. They want to harness specific digital functions, such as geolocation, automated proactive messages and collaborative co-browsing. Astute companies are determining how they can leverage these technologies to create better experiences for customers.

How do you anticipate the rise of digital channels (including automated engagement) impacting the way you manage contact center performance?

No major changes expected
18.42%

Need to add more resources/training for digital environment
31.58%

Self-service use will significantly increase
53.95%

Need to develop separate metrics for different channels
32.89%

Need to develop "universal" metrics that apply across all channels
19.74%

Fragmented systems/lack of 360-degree view will become even bigger bottleneck
23.68%

Phone volume will decrease for ALL issues
13.16%

Phone volume will decrease for simple issues, but will remain the top choice for complex ones
38.16%

Will make customer effort score more important
17.11%

Will make journey mapping and orchestration more important
27.63%

We'll need fewer agents for "support" - they'll move into different roles within the business
14.47%

We'll need fewer agents for "support," and some will be let go
14.47%

CX will leverage more "digital" functionality, such as proactive engagement, co-browsing and geo-targeting
31.58%

More emphasis on/investment into data collection and analysis
28.95%

Rethinking privacy/compliance for digital channels
35.53%

REMOTE REALITY: IS WORK-FROM-HOME A VIABLE OPTION?

The digital transformation was a widespread contact center priority; the Coronavirus pandemic simply accelerated action in many organizations.

Remote work, on the other hand, was a more niche option. It was certainly gaining traction as a way to increase talent pools, appeal to the next-generation workforce, attract people who reject the "stigma" of the contact center and assist with scalability and seasonality, but it was by no means a universal priority.

It is nonetheless here now, which means companies are getting a first-hand look at how it impacts their business. Some are surely finding that work-from-home is more viable than they first thought. Others are finding that it affirms all their worst fears and negative conceptions. Others, still, are identifying new challenges that they had not previously considered.

If companies are to make the most of their current remote workforces and then potentially leverage the model in the future, it is imperative to address the most pressing challenges.

For today's observers, no challenge is more significant than connectivity. About **56% of companies are concerned about connectivity,** which includes issues like unreliable Internet and phone service.

Other challenges include **maintaining daily communication and collaboration (37%), ensuring agents have the proper equipment (36%), protecting productivity (34%), offering real-time supervision and support (32%)** and **customer data and privacy (32%).**

Two themes lie at the center of the big challenges: lack of control and isolation.

The concerns regarding connectivity, equipment and privacy speak to the company's lack of control. The company can neither ensure agents are using acceptable (let alone state-of-the-art) communications equipment nor ensure they have a steady connection to the Internet. As a result, they have every reason to fear low-quality calls, dropped connections and periods of unintentional inactivity.

Remote work during the Coronavirus pandemic may be legitimizing these concerns. Some at-home workers are experiencing connectivity and quality issues, frustrating the employee, hurting the customer experience and undermining the brand's reputation.

Granted, some of these issues are a product of the crisis. Companies and agents had little-to-no time to transform their homes into offices. If given that time, they may have been able to invest in landlines and higher-caliber

equipment. Connectivity, on the other hand, is a harder issue to address. It is easy to blame Internet drop-outs on unexpected volume for service providers, but if work-from-home were to become the norm, so too would the exorbitant bandwidth needs. If companies cannot guarantee all agents have access to a speedy, unbreakable Internet connection, remote work will remain a challenge.

Without proper governance over the equipment, companies also render customer data vulnerable.

The customer data issue also speaks to isolation. As the agent is operating away from the physical contact center, the company has limited insight into how the agent is using customer data or who else within the home has access. It is for this reason that some high-stakes financial and healthcare institutions are particularly wary about the work-from-home model.

The collaboration, productivity and supervision challenges further speak to the isolation issue. Although collaboration and video conference tools are helping, they cannot completely replicate the face-to-face experience. On-site employees can easily share notes, assist friends, ask questions, seek support from managers and share

feedback. On-site managers can easily monitor employees and interactions to provide real-time coaching and encourage productivity. Productivity monitoring tools exist, but their implementation may send a demoralizing message about lack of trust.

Granted, there is definitely a glass half-full dimension to the isolation issue. One, for example, can make the case that remote work boosts productivity and strengthens collaboration by freeing agents from distractions. Agents will pick-and-choose the right moments to connect with their peers, as opposed to engaging in frequent chit-chat throughout the day.

The reluctance may, therefore, be a partial product of preconditioning and poor culture. Leaders may assume that face-to-face communication is more valuable or that agents derive more accountability from being in an office with managers looking over their shoulder.

As contact centers consider making their remote work programs permanent, they will want to balance these two perspectives. Which aspects of the at-home experience are objectively inferior to the on-site experience? Which merely look bad through jaded eyes?

Which of the following challenges have either prevented you from pursuing or impacted the success of your work-from-home initiatives?

Training and coaching limitations/challenges
28.95%

Real-time supervision and support
31.58%

Concerns about productivity
34.21%

Concerns about presentation (agents sounding tired, not wearing professional clothes, etc)
7.89%

Concerns about daily communication and collaboration
36.84%

Culture
18.42%

Equipment (quality, costs, inspections, etc)
35.53%

Worries over internal tech support volume/complexity
27.63%

Concerns about protecting customer data & privacy
31.58%

Concerns about remote agents accessing enterprise systems
30.26%

Connectivity (ex- inconsistent Internet in agents' homes)
56.58%

Don't have proper contact center systems/platforms/tools
11.84%

Don't have proper analytics/quality monitoring
21.05%

Concerns over long-term (ex - can remote agents become managers?)
13.16%

Unsure how to manage workflow (ex - should remote agents only handle certain issues, channels, etc)
23.68%

Nothing / Not Applicable
17.11%

PRACTICALITY GUIDE

Customer experience case studies, expert tips and practical exercises that you can bring back to the office.

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HOW THE 5 MOST URGENT CONTACT CENTER TRENDS CAN BECOME YOUR BIGGEST OPPORTUNITIES

No one was disputing the importance of business continuity, remote work, the agent experience and the digital transformation prior to the COVID-19 outbreak. Few, however, were meaningfully *acting* on these trends. They may have made overtures to digital engagement, adopted some cloud technology or embraced rhetoric about customer and agent centricity, but they were not fully transforming their operations.

The pandemic took inertia and complacency off the table. It thrust sizable demands on contact centers, forcing them to accelerate their adoption of new strategies, mindsets, systems and engagement journeys.

Businesses are being disingenuous if they claim this transformation comes without roadblocks or learning curves. The most customer-centric companies, however, are viewing these challenges through a positive lens. Rather than dwelling on the factors that prevent them from wholly satisfying customers and agents in today's chaotic world, they are making the most of their rapid

changes. They are analyzing and eliminating pain points to not only satisfy today's customers but ensure they more permanently modernize their customer contact functions

Instead of reverting back once COVID-19 subsides, they are planning to take an even bigger leap forward.

To put you on this more forward-looking, customer-centric track, here are some tips for reframing the most urgent contact center trends as opportunities for lasting success.

CUSTOMER EXPECTATIONS ARE CHANGING

To a greater degree than ever before, customers *want it all* when it comes to interactions with businesses. With so much on which to focus and worry in today's climate, customers demand fast, frictionless interactions in their preferred channels. With financial uncertainty (and even fear) on their minds, they also demand highly personal, empathetic interactions.

Given that many struggle to be efficient, omnichannel or empathetic in their interactions, this notion of doing it all at once may seem daunting. There is, however, a clear opportunity.

Hoping to avoid lingering pain points like long wait times and repetitive questions, customers are more willing than ever to use low-touch digital channels and/or self-service. Companies that can deliver great experiences in these channels *right now* will not only satisfy immediate demand but build long-term trust in these environments. If digital utilization rises in the long run, companies will reduce traditional "call volume" and allow agents to focus on productive tasks.

Those productive tasks can, of course, include engaging in more personal, detail-driven conversations with customers who require human assistance. Companies that swiftly adapt to this new normal - and train agents to demonstrate empathy and conversational agility - will make the most of this opportunity. They will position themselves as a trusted partner, building long-lasting relationships with customers.

A more robust, omnichannel experience will *also* help companies extract more valuable data. Self-service channels will help them quickly categorize customer intent and preferences, while deeper, agent-led interactions will uncover sentiment.

> "Automation creates proactive opportunities for customers to self-serve on almost all channels in addition to being able to access personalized information through notifications," explains Manish Pandya of TaskUs. "When combined with a ubiquitous data layer and insights from data science strategies, you maximize its power to deliver predictive analytics and optimize various machine learning algorithms."

A NEW AGENT IS REQUIRED

A seamless, personalized, omnichannel experience requires more than the flip of a switch. It requires taut experience design and investment into powerful contact center technology.

It also, notably, requires agents capable of performing in this new normal. These agents have to be digitally savvy in order to manage customers as they move across channels. They have to be versatile enough to handle sudden changes in their work environments, let alone workflow and daily responsibilities. They have to be creative enough to help customers who are requesting unusual assistance

in today's unprecedented times. They also have to be empathetic enough to support customers who are going through emotional and financial difficulties.

The standard contact center agent, a professional that historically focused on rote, repetitive inquiries, may not possess the sufficient skills. Companies that can *unlock* vital "human" qualities from within their workforce while providing sufficient re-training and cross-training will, however, put their brand in position to elevate the experience.

They will also prepare themselves for a long-term world in which "AI will handle simple matters, allowing agents to focus on complex ones." With 95% of companies anticipating such a dichotomy moving forward, why not get a head start?

> "We want to ensure that as we progress as a company, that we select candidates that can adapt in an innovative environment and seek to discover their individuality," explains Brandy Rosner of TaskUs. "Utilizing a variety of sourcing channels, and identifying a balance of technical savviness and soft skills such as empathy, enthusiasm, and problem solving ensures that TaskUs attracts and garners top talent."

MAKE AGENT EMPOWERMENT A REALITY

Make no mistake: certain employees are better-suited than others for a world in which agents handle more complex, more emotionally nuanced interactions. That does not mean agents are independently responsible for adapting to the new normal.

Companies play an enormous role in *empowering* agents to leverage human skills to create better experiences. Some of this stems from cultural conditioning, communicating the message that customer centricity is the ultimate goal. With customers requiring warm, trustworthy support to a greater extent than they ever have, now is the perfect time to make the cultural shift.

It takes more than mindset, however, to truly empower agents. CCW Digital research confirms that day-to-day effort impacts the agent experience to a greater extent than any other aspect of the contact center - including salary. With research identifying *fragmented agent desktops* and *siloed customer views* as the biggest productivity barriers, it is clear that empowering agents also means providing them with a seamless, 360-degree window into customers and the experience journey.

It additionally involves raising the standard for learning, providing agents with a combination of effective group training, timely micro-lessons, real-time performance insights and personalized coaching and development.

> "Through simulations, we create training for complex workflows and decision tree processes that teammates are able to follow through a guided simulation using "show me, guide me, and test me" modes," details Reema Vaghani of TaskUs. "Through the analytics from the simulation test modes, we can identify what teammates need help with and follow up with the right support."

COVID-19 introduces the task of increasing agent engagement and empowerment *while* incorporating remote work, but that too represents a vital opportunity. Thought leaders have long touted work-from-home as an option to improve the agent experience while attracting more diverse talent from different geographic regions. Leading contact centers will thus use today's climate as a way to perfect their work-from-home strategies; they will provide agents with the tools and knowledge to perform independently, while using technology to help supervisors monitor and support performance as necessary.

> "As a point of pride, we focus on supporting our teammates towards self-empowerment," says John Snead of TaskUs. "This is the essence of an adaptive and flexible contact center - one that is more responsive to the changing work environment we're currently facing which is setting the baseline of the future. Contact centers that provide real-time analytics to agents on current performance and coach self-management on these metrics create a more independent workforce that is more likely to succeed in working remotely."

And even as the pandemic subsides and some work returns to the traditional office, leading companies will maintain agent-centric principles to maximize employee engagement and output.

> "In our world, we create agent experience by providing world-class facilities, unique onboarding through innovative and completely experiential core camps, simulations, e-learning, skills focused practice, and an empowering coaching session every week," adds Vaghani.

METRICS ARE SHIFTING

With consumer emotions running high, the importance of emphasizing customer-facing metrics related to satisfaction, loyalty, sentiment and advocacy has never been greater. Astute companies will also turn these metrics *inward* to assess the quality of the agent experience.

Granted, operational efficiency is *not* falling by the wayside. Long wait times, slow calls and repetitive questions, the leading customer pain points in 2019, matter even more now that customers have so much *else* about which to worry. The adverse economic impact of COVID-19, meanwhile, forces companies to wear their belts considerably more tightly.

How do you balance these two sets of metrics?

The key is to identify efficiency metrics that directly correspond to great experiences. Notable examples include digital channel and self-service utilization, as well as "agent effort" metrics like "questions to resolution" and "silence time." Unlike the oft-derided efficiency metrics of the past, these indicators do not encourage "rushing customers off the call." Instead, they urge companies to leverage digital channels, great training, integrated systems and process automation to ensure companies remove the barriers to giving customers what they want when and where they want it. Costs will fall as customer satisfaction rises.

MAXIMIZING SCALABILITY, AGILITY AND BUSINESS CONTINUITY

In addition to asking tactical questions about channels, workflow and processes, COVID-19 has raised an overarching question: how quickly can customer contact functions adapt to change?

For many, the answer is "not well."

Thanks to their rigid staff arrangements, dated processes, short-term mindsets and restrictive legacy systems, contact centers have routinely struggled to adapt to sudden growth, regional expansion and the introduction of new channels. The disruption stemming from COVID-19 has not only exacerbated these issues but illuminated a bigger challenge: the lack of business continuity planning.

Savvy companies are using the climate as the impetus to simultaneously build comprehensive BCPs for their contact centers *and* explore more dynamic, scalable resources. This includes embracing cloud technology, cross-training team members, adopting more flexible staffing models and harnessing the power of business process outsourcing

partners who can expertly handle the workload stemming from change.

Moving forward, these companies will always be ready to adapt to change, whether it entails answering a new type of inquiry, understanding a new compliance rule, adding a channel or responding to a pandemic.

AGILE CUSTOMER CENTRICITY IN ACTION

Recent challenges, performance bottlenecks and learning curve issues have emphasized the harm in *not* taking an agile, customer-centric, agent-centric and forward-thinking approach to the aforementioned contact center trends.

The incentive to this approach is not, however, limited to reducing operational burdens and growing pains. It also yields demonstrable, measurable value for companies. Brands that have partnered with TaskUs to prepare for an omnichannel world with higher standards for customer interactions have enjoyed numerous benefits, including better CSAT and quality scores.

Here are some examples of companies that have unlocked the value of a next-generation customer experience.

Company: Philo

Challenge: Building and scaling a global customer support team from scratch

Solution: Since Philo was a first time outsourcer, TaskUs educated and guided them through their first product launch. By delivering a well-trained global support staff, TaskUs delivered a consistent CSAT score of 90% and above.

Company: Atom Tickets

Challenge: Scaling a customer support team without compromising CX

Solution: TaskUs delivered high quality teammates, operations management, business intelligence, and a superior learning and development program. This collectively helped to increase Atom Tickets' CSAT score from 87% to 96% during an unexpected issue with their partner's promotional code.

Company: Anonymous

Challenge: Scaling headcount for content moderation

Solution: Through sustainable scaling methods, unprecedented quality scores, and an improved search filter, TaskUs delivered 3 key results:

Scale: The client was able to scale to almost 300% of the original team size within 10 months of starting TaskUs' partnership.

Quality: Teammates consistently exceeded quality targets by keeping error rates below 3%. This was achieved through consistently providing real-time quality feedback to agents to correct areas of opportunity.

Real-time Feedback: With a limited search filter, teammates achieved 5,500 claims a week. After TaskUs implemented a real-time keyword tracker, teammates collectively delivered 8,500 claims per week--a 55% increase in total claims.
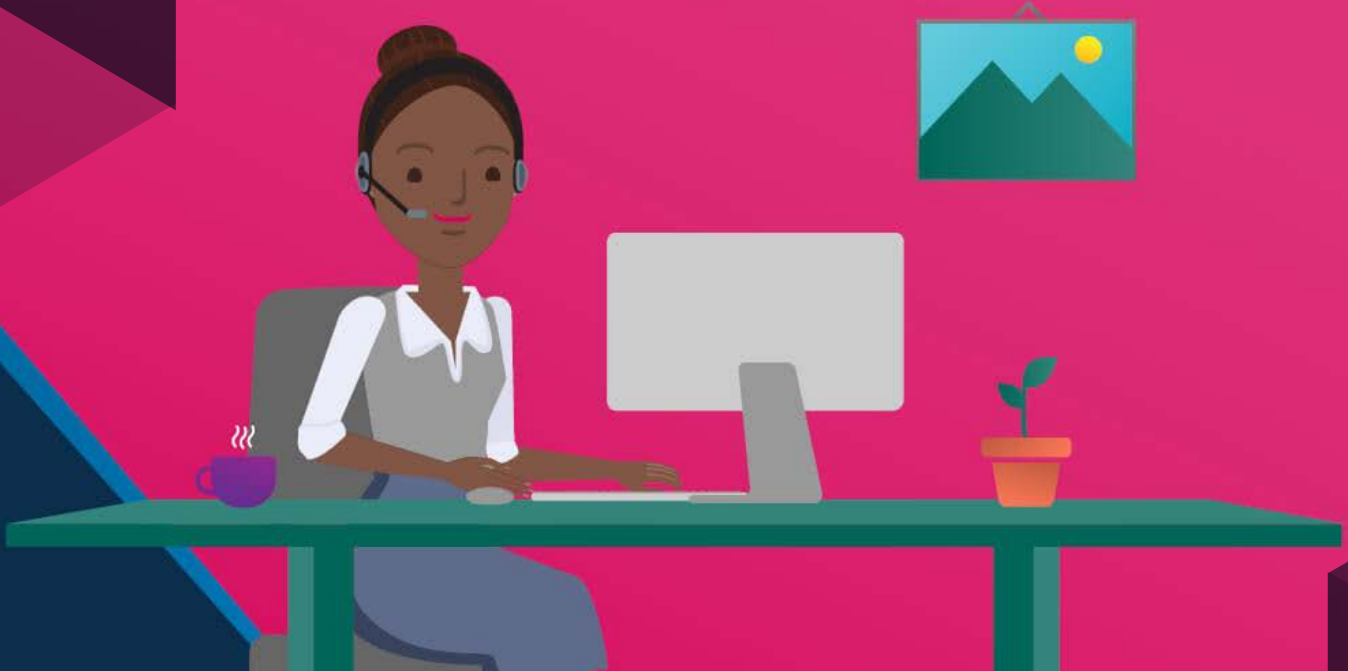
NOBLE SYSTEMS

ONBOARD, TRAIN AND ENGAGE REMOTE AGENTS WITH GAMIFICATION

Contact centers have been hiring increasing numbers of work-at-home agents in recent years and it looks like this trend is expected to grow. According to the National Association of Call Centers, over 50% of contact centers in the United States tout that some percentage of their agents are now working from home.

Remote employment affords many benefits to both agents and employers. Agents save time and money by not having to commute to the office. They often work more flexible hours than those who work on-site. This can diminish stress levels and enhance work-life balance.

For employers, a home-based agent model for at least a portion of their contact center staff results in a larger pool of candidates as they are no longer restricted by location. In addition, it further opens up the pool to those who want to work but whose life circumstances make it difficult or impossible for them to come into an office every day. They may be taking care of an elderly parent, have a disabled spouse, or have their own mobility issues.

A work-at-home agent model allows contact centers to attract more experienced workers. Studies indicate that the average age of at-home agents is 38 versus 23 for those working on-site. At-home agents add a wealth of experience to the team along with a strong work ethic and professionalism that leads to higher levels of productivity and performance and better employee and customer satisfaction. These factors contribute to lower attrition rates in an industry fraught with high levels of turnover. In fact, the at-home agent retention rate is 80%, whereas the rate for in-house agents is 25%.

Improving agent retention also lowers hiring and training costs. Another area of savings comes from the consolidation of office space and the need for less furniture, reduced utilities, and other related expenses. According to a recent **study** by GlobalWorkplaceAnalytics.com, at-home workers typically save businesses $11,000/per person per year.

Although an at-home agent model offers many benefits to both employees and employers, it is not without its **challenges**. Perhaps the biggest being — how to motivate, drive optimal performance and engage a remote workforce? Sustainable engagement is what is required to ensure agents remain happy, want to stay with the company, and are motivated to do more and do better.

Gamification, which uses game mechanics such as points, badges, leaderboards, rewards, and recognition, is an enabling technology that has gained popularity in recent years in contact centers. It is ideal for motivating desired behaviors and improving business outcomes, not just for on-site employees, but for at-home agents as well. It also provides a long-term solution for initiating and sustaining engagement. Gamification can help right from the start.

LEVERAGE GAMIFICATION FOR AT-HOME AGENT ONBOARDING

Typically, immersing at-home **call center agents** into the corporate culture can be a bit of a challenge. Not the case with **gamification**. During the pre-join period between acceptance of the job offer and the day an agent starts, a gamification platform can provide links to company newsletters, welcome videos, and other new employee assets. The system can also track viewership and award points or badges to at-home agents that take the initiative to broaden their knowledge of the company, even before their first official day. As work-at-home agents become more familiar with the company culture they also begin to build a sense of community.

Once new at-home agents officially start, you can continue to leverage gamification to get them up to speed, fast. From product and service modules to security and ethics training, gamification lets you track and reward early achievements. This raises the work-at-home agent's level of confidence and motivates them to become fully productive in record time.

Gamification can even be used to reward at-home agents for aptitude and usage of sales tools such as workforce management software and customer relationship management systems. There are benefits to companies as well. According to ERG, companies that have gamified the onboarding process have enjoyed a 48% boost in engagement as well as a 36% improvement in employee turnover.

DRIVE CONTINUOUS IMPROVEMENT BY GAMIFYING TRAINING AND PERPETUAL LEARNING

Gamification can continue to motivate at-home agents and keep them engaged beyond onboarding and initial training. Gamifying perpetual learning and displaying results on the remote agent's home page encourages friendly competition and helps them achieve continuous improvement in many areas – from agent quality and increased productivity to better compliance adherence and revenue generation.

6 TIPS FOR KEEPING REMOTE AGENTS ENGAGED

Sustainable agent engagement is a challenge in the best of circumstances. It can require an even more concerted effort to keep remote agents engaged.

Here are some tips to consider.

1. **Keep the lines of communication open.** It's easy to feel isolated when working remotely. Be sure to keep at-home agents in the loop about what is happening in the company. Daily messages posted on each agent's home page can make a world of difference. It is also important to schedule regular calls with your team so that everyone gets to know each other. Use several channels of communication to stay in contact with remote workers. Chat, social sharing and ideation help at-home agents collaborate with team members. Gamification can track and reward adoption and usage. It can also deliver continuous feedback in a fun and compelling way.

2. **Be clear about expectations.** It is just as essential for at-home agents as it is for on-site agents to clearly understand what you expect from them. Be sure to have a discussion about performance expectations and individual, team and corporate goals. Having a sense of the big picture and how the work that they are being asked to do will contribute to the overall success of the company is critically important.

3. **Leverage video conferencing.** In addition to daily feedback and communication through gamification, it is important to schedule face-to-face meetings with remote agents. Video conferencing is a great tool for one-on-one calls and for team calls. You might even consider hosting training sessions via video conferencing when you need to use visual aids to reinforce important information or you need participants to be more interactive.

4. **Include at-home agents in team traditions.** If acknowledging work anniversaries and employee birthdays are part of your company's traditions, be sure to include at-home agents. If you have a "Meet the Team" feature in your monthly newsletter, highlight an at-home agent from time to time. Inclusion in these types of traditions makes remote workers feel like they are truly part of the company culture and community.

5. **Recognize remote agents.** Digital recognition can help level the playing field for remote agents. Through gamification, at-home agents can be rewarded with virtual badges for their efforts and achievements. In addition, gamification can help encourage peer recognition by rewarding agents for giving kudos to others. Everyone likes to be recognized. It keeps agents motivated and engaged and always wanting to do more for their co-workers and the company.

6. **Offer growth opportunities.** Just because remote agents are not on-site, doesn't mean that they do not have ambitions for advancement. Ensure that they understand what their opportunities for development and advancement are from the beginning and what it will take to get there.

Mark Murphy, Founder of Leadership IQ, recommends having a conversation with at-home agents to help ensure they are continuing to grow. He suggests discussing the following.

-   What things the agent would like to improve in the next month. (This shows what they think needs to be improved. You may or may not be in sync.)

-   What you think they have improved in the last month. (This helps the agent know what you think about their development. They may be developing in areas they aren't even aware of.)

-   What they regard as their best moments during the last month. (This information will help you better understand their motivation.)

-   What they regard as their worst moments during the last month. (This signals areas they consider to be energy zapping or demotivating.)

GAMIFICATION IS A POWERFUL MOTIVATOR FOR AT-HOME AGENTS

Embracing remote agent solutions for part or all of your contact center workforce offers great benefits to both employees and employers. Advanced technologies have made it possible to hire great talent, no matter where they reside. And with the help of gamification, companies can provide fun and compelling initial and ongoing training, keep the lines of communication open, and ensure that remote agents truly feel part of the team and stay motivated and engaged in the corporate culture.

Appian

MAKE EXPERIENCES EFFORTLESS

Effortless customer experience (CX) should be your standard, not just a trend. According to Walker, by the end of 2020, customer experience will overtake price and product as the key brand differentiator. For every new technology implementation, program, or strategic initiative, your company should be able to demonstrate how easy it is for your customers to do business with you. It should be a seamless experience.

And if a new solution doesn't make things easier, why are you implementing it?

Drawing on Appian's work with our customers to build effortlessness into CX processes, here are six ways to improve CX in your operations.

UNIFY CUSTOMER VIEWS

Are you storing customer data in a variety of systems and databases throughout your organization? While having this data is helpful, employees and customer service representatives must have it delivered to them in a consolidated and organized way.

Bringing customer data together into a single system benefits both customers and employees. A unified customer view simplifies CX, helps employees focus on the customer, reduces training times, and increases employee job satisfaction. Organizations which achieve such effortless experiences set a high standard for CX, forcing competitors to keep pace or rapidly fall behind.

MAKE CASE MANAGEMENT SEAMLESS

Customer service agents are your front line to a frictionless experience for your customers. However, when agents don't have the information they need, this effortlessness becomes impossible. Customers have to repeat information, wait on hold, or be transferred repeatedly, and the CX falls flat.

Astonishingly, $1.6 trillion is lost every year as a result of poor customer service, according to a study by Forrester and Adobe.[2]

It's particularly important to unify interactions across people, processes, data, and content. Case management addresses loosely-structured processes, ad hoc interactions, and hard-to-anticipate events and milestones, and treats data as an equal partner with process.

INTEGRATE INTELLIGENT AUTOMATION

Artificial intelligence (AI) and automation represent the perfect union of technology for effortless CX. AI uncovers trends and relationships in vast datasets while automation tackles mundane and error-prone tasks, freeing people to focus on more complex situations. For example, many contact centers have implemented chatbots and virtual agents to assist customers with inquiries. Others are pairing AI with sophisticated automation capabilities that greatly enhance CX. If a customer is using a chatbot to research mortgage products for a new home, automated processes can make the process more effortless by pre-populating a loan application and providing additional information about local schools, community facilities and other amenities in the area.

AI is creating effortless experiences for employees too. Because customer service representatives regularly engage customers on a variety of topics, they need broad product or service knowledge at their fingertips. AI machine learning and natural language processing can provide agents with detailed insights for a specific interaction, and AI-guided next-best-actions or scripting can speed time to resolution.

LEVERAGE ROBOTIC PROCESS AUTOMATION (RPA)

Robots can handle almost any repetitive task that can be automated. Great examples of these types of tasks include authenticating customers, creating invoices, issuing refunds, updating orders, or notifying customers of shipment and application statuses. This includes passing on fringe or complex cases as necessary, redefining teamwork for effortless customer experiences.

The time saved, and related cost savings, should be enough incentive alone for using more automation. But RPA's real value lies in how these seamless experiences build lasting relationships and brand loyalty.

TRANSFORM OMNI-CHANNEL COMMUNICATIONS INTO DIGITAL ENGAGEMENT

Providing multiple channels of communication is important but no longer sufficient to engage customers. It's all about providing that multimodal self-service on any device, anywhere, available at any time. Organizations need to pivot to mapping their customer experience to provide this on demand service which does not always require an agent.

> "Instead of chasing channels, application leaders should embrace multi experience of great CX by addressing new digital touchpoints and interaction modalities." -- Jason Wong, Transcending Omni Channel Thinking and Embrace Multiexperience for Improved CX, Gartner, February 2020.

If you aren't empowering your customers to engage how and when they want, you're increasing their effort—and decreasing the quality of their experience. Customers want to use chatbots, text messages, social media, voice, or any combination of these — without sacrificing a seamless experience.. With the sheer quantity of communication choices for customers today, limited options could result in a loss of clients.

And the pressure is on: A PwC study found that 32% of customers stop doing business with a brand they love after one bad experience.

DRIVE RAPID DEVELOPMENT AND ADAPT TO CHANGE WITH LOW-CODE

Off-the-shelf solutions can be immediately available to purchase, but these products force you to adapt your business to pre-existing workflows and limitations. Traditional software development can fully customize a solution to your needs. However, that process is often long and cumbersome, requiring months of planning and execution; and the end result may not be able to fully deliver as needs and requirements changed.

The challenge with both of these paths is to keep up with shifting organizational needs and customer expectations. You need to be as agile and fluid with solutions as your customer base and markets demand. For example, if you have a new promotion, product or service which requires a change in your workflow or business process, you need to make changes quickly and easily, without submitting support tickets or going to third party providers.

Appian's low-code automation platform combines the speed of a packaged app with the fit-for-purpose uniqueness of custom development, alongside the power to support even the most complex enterprise use cases across the automation spectrum.

With case management capabilities, the platform assists problem resolution whether handling disputes, finance processing, service requests, incident management, client advisory, constituent response, or other case types. Agents receive the right information at the right time about the customer to act appropriately in a single pane of glass with all the relevant interactions and transactions.. Once the agent has that information, business rules and recommendations are provided the direction to take with the customer to reduce handle time, training time, improve agent quality and customer first contact resolution and satisfaction.

The result? Your agents deliver support more efficiently, employees spend more time staying ahead of customer demands, and customers spend more time engaging with your brand.

EFFORTLESSNESS STARTS AND ENDS WITH FLEXIBILITY

These days, effortless customer experience is a differentiator. Experience-driven companies report an annual growth rate of 15% compared to other businesses.[2] If customers know they can get a better experience elsewhere, that's where they'll go.

It's important that your CX team is able to respond to rapidly changing customer demands and trends. Solutions built on a low-code automation platform maintain integrity through these changes. Appian's platform is both flexible and scalable, so it will grow with your customers and organization.

With Appian for the Contact Center, you can deliver consistent positive experiences for users and customers alike. Effortlessly.

Appian provides a low-code automation platform that accelerates the creation of high-impact business applications. Many of the world's largest organizations use Appian applications to improve customer experience, achieve operational excellence, and simplify global risk management and compliance.

For more information, visit www.appian.com/intelligentcontactcenter

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[1] Customers 2020: A Progress Report, Walker

[2] PwC - Experience is Everything: Get it Right

sharpen

HOW TO CREATE NEW STANDARDS FOR CONTACT CENTER PERFORMANCE DURING (AND AFTER) A PANDEMIC

Typically, we'd introduce ourselves by telling a story that relates to your life leading a contact center.

But not today. Right now, everyone's viewing the world through a different lens. The past several weeks have been surreal. Companies across the globe learned and adapted to new ways of work — at warp speed.

Following our normal path didn't feel right. And it made us think — what's normal going to look like in the contact center from now on?

Current state, only a **slim 21%** of employees feel their performance is managed in a way that motivates them to do outstanding work (read: raise their productivity, hit their metrics, and improve business outcomes). And **statistics show**, flexible work environments become the new normal once employees (and execs) get a taste of the benefits.

As the dust settles and we look ahead, how will you manage a more flexible, distributed workforce? How will you define a new set of standards for contact center performance?

The answer? Lead with compassion and coach using specific, actionable feedback to not just function, but excel, in this new business climate. Learn to improve how agents work, so they can drive home the best outcomes for customers.

COACH AGENTS WITH DIRECT, TIMELY FEEDBACK TO IMPROVE CONTACT CENTER PERFORMANCE

(Note: You can use these coaching techniques for agents who are at home, in the office, or anywhere in between).

Have you ever heard of Flashbulb memory?

Flashbulb memory is our tendency, as humans, to only remember experiences where our emotions run high. The thrilling time we went skydiving. The upset we felt when we didn't get that promotion. Or, the infuriating call we had with a **red-hot customer** last week.

When it comes to our daily — sometimes monotonous — routines though, most of our memories vanish. We don't remember what we ate for dinner last night or how many customer interactions we cycled through during the day.

This fleeting access to memory is why in-the-moment coaching is so impactful.

Given how our memories work, coaching in spurts and keeping feedback in your back pocket won't lead to better performance. In fact, with this approach, your agents likely won't remember the interactions you coach them on at all.

To build call center improvement strategies for a better CX, coach daily. Give agents meaningful feedback the moment they need it to improve your customer's experience. Before a bad behavior becomes a bad habit.

Daily quality management drives better performance and experiences.

As a manager, you need to keep watch on KPIs, how customers feel about their conversations, and the ROI you deliver on your contact center.

To help, some call center platforms (like ours) have built-in functionality, so you can monitor agent performance and offer developmental feedback, too.

Here are 4 elements of a quality management program that drives positive performance:

1. Agent scorecards

2. In-line feedback on recordings and transcriptions

3. Threshold and trigger-based coaching to help you ID interactions that need attention

4. Microlearning lessons

Now, let's walk through each element so you can boost performance and customer happiness.

Score agent interactions for quick performance overview.

With agent scorecards, you can grade interactions based on criteria that matters most to your customer experience. Think of a scorecard as the grading rubric you used to build your solar system diorama in science class. It calls out what's important to address in customer interactions, and leaves out the smaller details (sorry, Pluto).

Create templates for scorecards in your contact center platform. Use questions that matter most to your customer outcomes. Do you want agents to make the conversation personable and introduce themselves? Create a scorecard element for intros. Do you want to rate the tone of your agent's interaction? Were they a little abrasive, or maybe just a touch too casual? Create a scorecard element to match.

Lead with what's most important to your customer experience. And, weight it accordingly. If an agent breezes past their intro but the customer leaves happy, their scorecard should mimic that sentiment.

Use data and reports from past interactions to help you predict what matters most to your customers. If you spot a trend where customers leave low CSAT ratings after they wait on hold too long, those are the types of metrics to monitor in scorecards.

Give in-line feedback to add relevant context to coaching and training interactions.

Comment and provide feedback on interaction recordings and transcriptions, adding relevant context to your coaching conversations.

With contextual coaching and training, you can focus your agents' attention on the areas they need to correct, or the standout moments they need to repeat.

Let's say your agent Jessie changes her tone at the 33-second mark during a customer call. She answered the phone with a helpful and positive attitude, but soon into the convo, her frustration started to show. Often, this outpouring of frustration is involuntary. We don't know our tone shifted and we became brusque – in-line feedback solves for this. It lets you call out moments, down to the specific second, where your agent can review interactions and learn.

Set thresholds to alert you to coaching opportunities.

We're giving all this advice, meanwhile you can barely find time to scarf down a bagel for breakfast each day. We know.

How can you move toward improvement when you barely have time to maintain the status quo? Automate pieces of your coaching, so you can fit it into your daily routine.

Selecting a handful of interactions for review at random isn't an effective way to improve team performance. Instead, use your contact center platform's routing engine to help you ID interactions ripe for coaching.

Set thresholds on certain metrics, like **Average Handle Time**, Hold Time, and **CSAT**. When the metrics see a sudden dip (below the threshold you set), you'll get an alert to review the corresponding interactions. Then, you can jump in and give feedback on interactions that need it. (Before flashbulb memory vanishes memories of seemingly inconsequential interactions.)

The benefits are threefold: You don't spend time reviewing interactions that don't need intervention. Your agents get empowered with fast, in-the-moment feedback to improve their next interaction. And, your customers get better resolutions because of it.

Deliver microlearning lessons to your agents' queues.

Send quick microlearning lessons and training to your agents' queues to help them improve skills further. Based on the thresholds you set, automate coaching lessons for delivery to your agents' queues. Let's say your agent's average handle time is high. Your system will recognize the threshold and send a microlearning lesson over to the agent with tips to reduce AHT.

You can get hyper-specific with these microlearning lessons. Tools with text and sentiment analysis can help you watch for specific words and key phrases that pop up during customer interactions. Like if a customer says the word "cancel." Your agents likely have a protocol to follow if a customer tries to jump ship. But if the conversation reaches this point, it's a good idea to offer more resources for your agent to lean on.

With thresholds and triggers set for the word "cancel," automate your system to send an agent a relevant microlearning exercise on "how to handle possible cancellations." Then, they get context and training to their queue to inform relevant conversations. Say hello to a more empowered, better-equipped workforce. (And, to happier, more loyal customers).

4 TIPS TO MANAGING AGENTS WORKING AT HOME TO DRIVE BETTER CUSTOMER OUTCOMES

You don't have to shift policies or write new best practices to coach using technology. But navigating your 1:1s and team meetings is a bit different when you're not working in the office. And so is giving your team the home set-up they need to be successful. Here are four tips to help agents comfortably help customers (from home).

1. Make sure agents have access to the docs, network and resources they need.

Partner with IT to get your most-used agent resources online and available to your work-from-home call center agents, first. And, work with vendors to learn network requirements and see what it takes for agents to handle interactions from anywhere.

Set your agents up for autonomous work, so they're empowered to help customers. And while they work, focus on **outcomes over metrics.** Too often, we see managers complain that agents need their hands held through seemingly simple tasks. This comes from a fear of failure.

If your agents fear making a mistake, they'll look for a lifeboat every time they're unsure about a decision. Even if it benefits the customers. Remote work means less hand-holding, more confidence boosting.

How Premium Service Brands and Sandia Credit Union Sent Agents Home Without Disruption to Customer Service.

Company: Premium Service Brands, leaders in home services franchise opportunities like, Maid Right, Handyman Pro, and ProLift Garage Doors.

Challenge: In mid-March, contact centers around the country were scrambling to move their agents from brick and mortar operations to work-at-home models.

Solution: Premium Service Brands reached out to Sharpen to get their employees home quickly, without disrupting service. "We had everyone in the office on Monday, and by Tuesday, everyone was working from home," said Paul Roberts, PSB's customer care manager. "Partnering with Sharpen and using their cloud-based system allowed us to continue to offer excellent service to our clients all over North America."

Company: Sandia Area Credit Union, a not-for-profit financial cooperative dedicated to simplifying the financial experience, serving members since 1956.

Challenge: As contact centers with legacy tech struggled to move their agents home, Sandia successfully moved to a work-from-home-model and realized a new challenge: a 170% uptick in interaction volume when their 110,000 members could no longer visit banks in-person.

Solution: Sharpen's customer care team worked closely with Sandia to add new agents and channels to meet the demand. "Transitioning our workforce to work-at-home was no big deal. That was one of the reasons we chose Sharpen in the first place," said Sandia's Chief Experience Officer Matt Benidt. "And adding agents into our customer care settings is one of the most fantastic things you guys could have done for us. That helped us realize some new value."

2. Avoid schedule creep.

When you know your agents are home, it's easy to ask for help during a busy period, even if your agent is off the clock.

Hmmmm... Sally's shift begins in 30 minutes and we're slammed. She's working from home, so I'm sure she's around and can step in to help, thought Sally's manager, tempted to interfere with Sally's time to unplug.

This is a triple scope of nope. Set boundaries for your agents (and yourself). Working from home makes it easy to lose track of time and let hours at work bleed into hours at home. But for most agents who work on hourly schedules, you'll need to be conscientious of the time they're putting in. It's how you'll stay on budget and keep up with accurate workforce management planning.

And, it's how you'll keep work-life balance and morale high for your agents. Just because your agent was online and communicating with you from home all day doesn't mean they want to answer customer emails from their couch at 9 p.m. Follow a schedule for communicating with your team, just as you would if they were sitting in the office.

3. Use video conferencing for coaching sessions and team meetings.

Face-to-Face communication doesn't have to be lost with remote work. Use tools like **Skype**, **Zoom**, or **Google Hangouts**, to host team meetings via webcam. Sit down in front of your webcam and lead the meeting just as you would if you were in a meeting room together.

These conferencing tools make it easy to share your screen so you can review important metrics and dashboards. And, they give your agents a two-way street. Agents can chime in and ask questions or share stories via their microphones or chat. You can even ask your team to turn their webcams on for that added personal touch.

Hop on a video call for your 1:1 coaching sessions, too. Sometimes, sentiment gets lost over the phone. According to **leading psychologists**, when we communicate, our words, tone of voice, AND body language all matter to our message.

Being present with your agents and letting them see your expressions as you share feedback is crucial to keeping communication crystal clear. Review performance, talk through development opportunities and even discuss career goals on these video catch-ups.

4. Keep communication steady (without standing over your agents' shoulders).

Have a primary (and instant) form of communication in addition to your scheduled meetings, calls, and emails. Use a messaging app to keep the lines of communication open to your team, so they know they can reach out for help.

Your agents are used to having you and their peers a few steps away when they need help. Not sharing a central office might cause apprehension for those who lean on you most. Empower agents to offer help and make decisions in the best interest of the customer (within reason). Recirculate documents from your **business continuity plan** on the dos and don'ts of remote work, and bake in some flexibility for your agents.

But don't use this channel as a tool to hover. Working from home means trusting your agents to do their jobs and help customers. And checking in with them every half hour undermines that trust. When you do, it spirals into a ton of other bad outcomes for your business. Create a positive environment (no matter your location), so agents deliver for customers.

![Callminer logo]

STATE OF THE ART CALL CENTER STATISTICS YOU SHOULD KNOW

As industrial and economic globalization trends continue to develop, the use of outsourced talent, coupled with automation and artificial intelligence, to accomplish a wide variety of tasks ranging from the rote and repeatable to the complex and mission-critical, grows ever more ubiquitous.

Call centers represent just one component of a large and varied international outsourcing industry that continues to benefit from that automations. However, the world's call centers are arguably the most public facing examples of companies' outsourcing efforts, interacting with customer directly in one-on-one conversations. This makes them especially important to the organizations and brands that they represent.

Of course, not all call centers are outsourced, nor are all call centers purely customer-facing operations. In fact, contact centers vary in form and focus, depending on a given company's objectives and use cases. And the role played by AI, machine learning and robotic process automation in call center strategy and execution vary by use case. Here are a few common needs that are met by a dedicated call center:

Time Conservation

This is arguably the simplest reason for a company to consider utilizing a dedicated call center to complement the rest of its workforce. Time is money and in-house employees who are tethered to phones all day have a harder time attending to their other duties. Call centers offload the unsung labor of call handling to trained experts in the domain, freeing up valuable in-house time for primary priorities.

Better Agent Performance

When dedicated call center agents are focused exclusively on handling calls, there's often an improvement in important call center metrics like first call resolution. Tools like speech analytics solutions help monitor QA, ensure compliance, and provide insights that aid in agent performance management, as well.

Sales Pursuits

Should your company need to put more effort into handling sales-related activities such as order management and appointment scheduling, it can help tremendously to pass this work on to a dedicated team.

Facilitating Cooperation

Although most of your business's tools and employees may work well together, there can still be a need for internal support providers who can give guidance or link distant divisions together efficiently in the event of difficulties arising at any time.

Below, you will find interesting statistics pertaining to today's call centers, their employees and their finances that may prove helpful in making the case to use to your executive team to build, expand, automate or outsource call center functions for your organization.

CALL CENTER WORKFORCE STATISTICS

1. Cloud contact centers may be more reliable.

"Cloud contact centers are 27% cheaper and experience 35% less downtime than their on-premise counterparts." – **88 Call Center Statistics You Must Read: 2019 Data Analysis & Market Share**, **Finances Online;** Twitter: **@Financesonline**

2. The need for competent customer support is growing.

"59% of customers say that they have higher expectations for customer support than they had a year ago." – **30 Call Center Statistics and 10 Metrics To Track In 2019**, **Time Doctor**; Twitter: **@manageyourtime**

3. Many companies are coming up short with customer support.

"Only 26% of consumers responded positively when asked if they believe customer service centers provide great support, compared to 49% who did not." – **Daniela Puzzo**, **5 Important Customer Service Statistics for Call Centers**, **Fonolo**; Twitter: **@fonolo**

4. Larger call centers may struggle with higher turnover.

"Below is a study conducted by DailyPay on various attrition rates segmented by industry.

Call Center Turnover Rates

- Small-sized call centers: 17%
- Medium-sized call centers: 37%
- Large-sized call centers: 44%"

– **Michael Mahoney, Call Center Attrition Rates**, **Avoxi**; Twitter: **@AVOXI**

5. Phone support is still widely preferred by consumers.

"Consumers prefer the following channels: phone (61%), email (60%), live chat (57%), online knowledge base (51%) and "click to call" support automation (34%) (eConsultancy)." – **Shauna Geraghty**, **10 Customer Service Statistics for Call Center Supervisors**, **Talkdesk**; Twitter: **@talkdesk**

6. A surprising number of call centers are headquartered in the U.S.

A survey of global contact center industry leaders carried out from November to December 2016 found that some 66 percent of their organizations were located in the U.S." – **E. Mazareanu**, **Call center services industry in the U.S. – Statistics & Facts**, **Statista**; Twitter: **@StatistaCharts**

7. Many call centers have trouble adopting modern practices.

"Liveops, the enterprise standard for delivering on-demand remote agents for customer service and sales, today released its 2018 Call Center Industry Report, which reports the findings of a survey of more than 750 customer service professionals from organizations of all sizes and within multiple industries.

"The results categorized call centers in four stages of maturity. Two-thirds of respondents overall were 'behind the curve' in terms of evolving their traditional call center into a modern customer service operation." – **2018 Call Center Industry Report Reveals Call Center Innovation Lagging**, **Globe Newswire**; Twitter: **@GlobeNewswire**, **@Liveops**

8. Most consumers prefer real people over automated systems.

"When asked what the most frustrating aspect of a customer service experience is, over a third of U.S. respondents (34%) chose 'Automated Telephone System (IVR)/inability to reach a live person for customer support.'" – Cathy Reisenwitz, **16 Call Center Stats to Help You Stay On Top of the Trends in 2018**, Capterra; Twitter: **@capterra**

9. The introduction of AI in call centers may revolutionize the industry.

"Global call center AI market is expected to rise to an estimated value of $4.7 billion by 2026, registering a healthy CAGR in the forecast period of 2019-2026. This rise in market value can be attributed to the increased adoption of automated services in business operations along with innovations/advancements in AI." – **Global Call Center AI Market To Witness Tremendous Growth**, **Hitz Diaries**

10. Many call centers struggle to provide ideal tools to their agents.

"60% of agents agree that their company doesn't always provide the technology that staff needs to address the challenges they face when helping customers. 44% of agents lack the tools that are available to them and 34% believe they don't have the right customer data available at the time of request." – **Contact Center Industry Stats – Technology**, **The Taylor Reach Group**; Twitter: **@taylor_reach**

11. There is a growing surplus of call centers worldwide.

"There are tens of thousands of call centers around the world involving millions of jobs. In India there are over 250,000 call center jobs in Bangalore alone; in the Philippines there are over 700,000 such jobs. In states like Florida, Arizona and Texas call centers are big employers; Texas alone has over 600 call centers with 250,000 employees." – **Thomas Dichter**, **Call Centers Return To The U.S.**, **Forbes**; Twitter: **@Forbes**, **@DichterThomas**

12. Call center turnover may be trending down overall.

"In 2016, outsourcing contact centers had a mean turnover rate of 73%, in 2017 it was reported the turnover was only 49%." – **Megan Wells**, **Call Center Turnover Statistics In 2018**, **Daily Pay**; Twitter: **@ailypay**

13. Consumers consider jumping ship when support staff lack patience and expertise.

"Experiences that would make customers take their business elsewhere include unfriendly service (60%) and employees' lack of knowledge (46%)." – **Customer Experience and Contact Center Statistics**, **Brad Cleveland**; Twitter: **@bradcleveland**

14. Continuity matters to callers who have contacted support before.

"72% of consumers say that when contacting customer service they expect the agent to 'know who they are, what they have purchased and have insights into their previous engagements.'" – **100 Essential Customer Service Statistics and Trends for 2019**, **Nextiva**; Twitter: **@Nextiva**

15. Kind and enthusiastic agents make a major difference in service perceptions among consumers.

"More than two thirds of those surveyed (68%) said that a pleasant representative was key to their recent positive service experiences, and 62% said that a representative's knowledge or resourcefulness was key." – **#WellActually, Americans Say Customer Service is Better Than Ever**, **American Express**; Twitter: **@AmericanExpress**

CALL CENTER FINANCE STATISTICS

16. Simply picking up the phone more often can save businesses money.

"A 1% improvement in First Call Response = $276,000 in annual operational savings for the average call center." – **Silky Sinha**, **30 Significant Contact Center and Customer Service Statistics**, **Ameyo**; Twitter: **@AmeyoCIM**

17. The call center market may double in revenue by 2022.

"CustomerServ estimates the overall call center marketplace to be around $200 billion in revenue. By 2022, the global market is expected to reach $407.1 billion, according to predictions by business intelligence firm Global Industry Analysts." – **Nick Jiwa**, **Market Size: Just How Big Is the Call Center Industry?**, **CustomerServ**; Twitter: **@CustomerServLTD**

18. A large portion of revenue is spent on manual caller verification in the U.S.

"U.S. contact centers spend $12.4 billion annually verifying the caller is who they say they are. 59% of calls require identity verification, but only 3% of these are handled entirely through automated processes." – **Alicia Johnson**, **25 Stats That Indicate the Recent Trends in Contact Center Industry**, **Fusion Blog**; Twitter: **@fusionbpo**

19. Projected growth of call center staff should be offset by innovative technological investments.

"Forty-six percent of global contact center decision makers project their contact centers to grow by 5% to 10% (as measured by number of agent seats) in the next 12 months, and 14% project growth of more than 10%.This approach is not economically sustainable." – **Kate Leggett**, 2**018 Customer Service Trends**, **Forrester**; Twitter: **@forrester**

20. A work-from-home model may make additional savings possible, while maintaining high service quality.

"It's estimated that every staff member who works from home saves the employer **$25,000.**

"With savings like this possible through a different call center business model, employers are able to improve their ROI without compromising on service." – **Top 5 Trends Driving the Growth of Virtual Call Centers**, **Snapcomms**; Twitter: **@snapcomms**

21. Self-service may prove a powerful new option for customer service savings in years to come.

"Gartner Research shows that customers will handle 85% of their relationships with a company without ever interacting with another human by the year 2020." – **5 Eye-Opening Customer Service Stats for Call Centers**, **CGS**; Twitter: **@CGSinc**

22. For now, the trend of outsourcing call center operations to offshore markets continues to grow in popularity.

"Spending on outsourced services in the global market has grown in the last two decades, from $45.6 billion in 2000 to $86.6 billion in 2018. Almost double! And it's not slowing down." – **The Ultimate List of Outsourcing Statistics**, MicroSourcing; Twitter: **@microsourcing**

23. U.S. service representatives continue to receive competitive pay rates.

"Payscale.com reports that the annual salary for call center customer service representatives ranges from $22,000 to $39,000. Performance bonuses and commissions can increase those figures. Call center trainers receive $25,800 to $55,000 while call center managers earn between $35,000 to $75,000." – **What You Need to Know About the Call Center Industry**, **4 Corner Resources**; Twitter: **@4_Corner**

24. Customer experience can make or break your business.

"An estimated $41 billion is lost by U.S. companies each year following a bad customer experience." – **80 Customer Service Statistics**, **Groove**; Twitter: **@Groove**

25. Offshore call center agents continue to represent significant savings for U.S. companies.

"[...]a U.S. call center employee costs a company $20 per hour on average versus $12 per hour in India. That cost includes including labor, technology, and phone routing." – **Kimberly Amadeo**, **Call Center Outsourcing's Effect on the U.S. Economy**, **The Balance**; Twitter: **@thebalance**

APPENDIX

2020 EDITORIAL CALENDAR

FEBRUARY

Market Study: State of Contact Center Technology

February 2nd, 2020

MARCH

CCW Online: State of Contact Center Technology

March 3rd, 2020

APRIL

Market Study: New Standards for Contact Center Performance
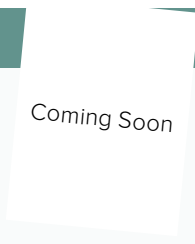
April 27th, 2020

MAY

CCW Online: New Standards for Contact Center Performance

May 19th, 2020

AUGUST

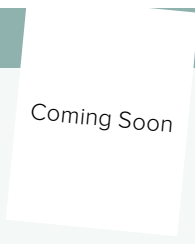**Customer Experience Trends, Challenges, & Innovations**

August 11th, 2020

Coming Soon

SEPTEMBER

CCW Online: Customer Experience Trends, Challenges & Innovations

September 22nd, 2020

NOVEMBER

Future Of The Contact Center: A Forecast

November 3rd, 2020

Coming Soon

DECEMBER

Future of the Contact Center

December 1st, 2020

MEET THE TEAM

Brian Cantor
Principal Analyst, Director
CCW Digital
E: Brian.Cantor@customermanagementpractice.com

Simon Copcutt
Head of Strategic Accounts
CCW Digital
E: Simon.Copcutt@customermanagementpractice.com

Andy Kuang
Marketing Manager
CCW Digital
E: Andy.Kuang@customermanagementpractice.com

Matt Wujciak
Staff Writer & Editor
CCW Digital
E: Matt.Wujciak@customermanagementpractice.com

Emily Dunn
Digital Marketing Assistant
CCW Digital
E: Emily.Dunn@customermanagementpractice.com