# IT'S TIME TO OPTIMIZE THOSE UGLY AGENT DESKTOPS!

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Contact Center
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# IT'S TIME TO OPTIMIZE THOSE UGLY AGENT DESKTOPS!

## Move the agent desktop to the top of the to-do list for a big payback.

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Every contact center looks for ways to be more effective and efficient in handling customer contacts, and process improvement is a high impact opportunity. Yet we see few centers focus attention on the agent desktop, a common hindrance to smooth processes and a ripe target to enable dramatic changes. In this article, we'll look at the value of desktop optimization and the tools that can help.

## A BIG Target with BIG Payback

The desktop problem is ubiquitous but faces daunting hurdles on the road to optimization. The center must define contact-handling processes from start to finish, often with involvement from many departments. Projects can get stalled waiting for a new core system, a customer relationship management (CRM) application, internal changes to the existing home-grown applications, or just debates about which way to go. And progress depends on IT to integrate systems and data.

Given its (potentially very big) payback, agent desktop optimization should head to the top of the "to-do" list. Simplifying processes through application integration, guided processes flows, and ready access to knowledge aids and data can:

▸ Reduce average handle time
▸ Provide consistency
▸ Increase first-contact resolution
▸ Decrease repeat calls
▸ Reduce escalations
▸ Improve accuracy and compliance

▸ Reduce training time
▸ Increase customer satisfaction

So let's look at the functionality that can deliver these coveted outcomes.

## A Wealth of Functionality to Tap

Desktop optimization tools can be divided into four categories of functionality: dynamic scripting, knowledge aids, CRM and unified agent desktop (UAD). In addition, common functions cut across all these components, such as workflows and reporting/analytics. (**SEE FIGURE 1.**) Integration provides critical connective tissue among functions and applications. It can be tricky to distinguish the functionality from vendor solutions and messages, so we'll first discuss the capabilities required for optimization and then look at the market landscape.

## THE FOUR COMPONENTS OF AN OPTIMIZED DESKTOP

### DYNAMIC SCRIPTING

Dynamic scripting is not rote scripting. Dynamic or smart scripting walks the agents through process steps with guidance on what to say and do, while allowing for a variance in the contact flow based on the customer's requirements and responses. It guides the conversation with logical steps that lead to the desired conclusion and provides suggestions to direct agents to the right places. Dynamic scripts are typically part of workflows based on your internal processes.

### KNOWLEDGE AIDS/ KNOWLEDGE MANAGEMENT

Knowledge aids organize knowledge in a way that is efficient and effective for agent use. Knowledge tools provide advanced search mechanisms that provide the exact information required in the moment, while making the search results small enough to digest and use in real time. Workflows can be structured to deliver the right knowledge at the right time in the process. Knowledge tools also provide the ability to keep content up to date, relevant and accurate through ratings and rules that trigger information updates or retirement.
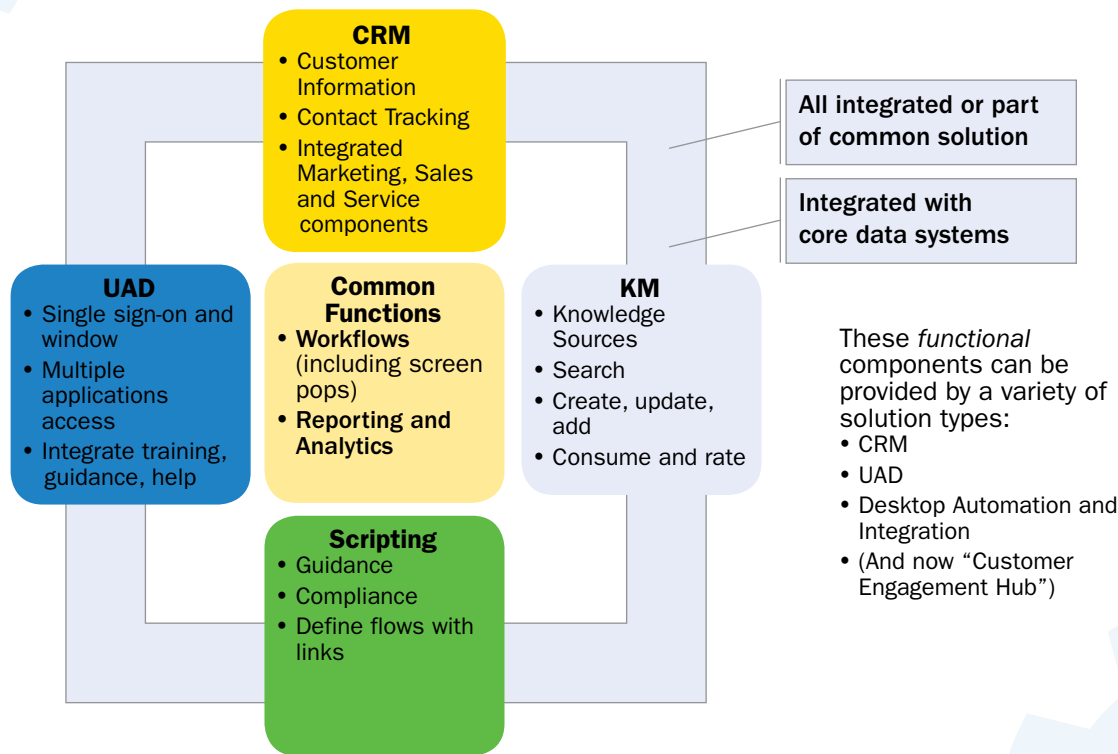
### UAD

A unified agent desktop application brings a variety of disconnected applications together, repackaging the information needed into streamlined views and steps. In essence, it provides a "front-end" to the many applications an agent may access in serving customer requests. UAD can provide additional functionality such as single sign-on, integrated training and help, workflows, and reporting and analytics.

### CRM

CRM provides configurable screens structured to reveal the most relevant information the agent needs in a single view, with tabs or links to other pages or sources for drill-down. The view typically includes customer and account information as well as past contact information, which is updated with each interaction. CRM helps enable the "omnichannel" vision,

**FIGURE 1:** Functional Components of a "Good" Agent Desktop



**CRM**
- Customer Information
- Contact Tracking
- Integrated Marketing, Sales and Service components

**UAD**
- Single sign-on and window
- Multiple applications access
- Integrate training, guidance, help

**Common Functions**
- **Workflows** (including screen pops)
- **Reporting and Analytics**

**KM**
- Knowledge Sources
- Search
- Create, update, add
- Consume and rate

**Scripting**
- Guidance
- Compliance
- Define flows with links

All integrated or part of common solution

Integrated with core data systems

These *functional* components can be provided by a variety of solution types:
- CRM
- UAD
- Desktop Automation and Integration
- (And now "Customer Engagement Hub")

pulling together contact data from different applications. CRM can be the repository for customer data to use in identification and verification, routing and contact handling. CRM also includes sales and marketing components (in addition to service) for overall visibility of the end-to-end customer lifecycle. The CRM application often becomes the unified desktop interface. CRM can also provide the framework to build process flows and provide scripting for specific interaction handling tasks.

## COMMON FUNCTIONS THAT LINK THE COMPONENTS

Some functions apply to all the components and ensure that they all work together to optimize the value of the unified desktop.

### WORKFLOWS
Workflows can feel like one of the most difficult aspects of an optimized desktop, but also the most impactful. They define "if... then..." actions and can link the interaction to process steps that come before and after.

Today's tools help address the hurdles of capturing process flows through automation. In addition, workflows allow monitoring and tracking for each step along the way.

Some examples of workflow tools that can transform a desktop include:

▸ Assima for training and authoring process documents

▸ RiverStar presents relevant information and provides scripted workflows

▸ Panviva's SupportPoint Solution provides agent process guidance

▸ OpenSpan offers Robotic Desktop Automation by understanding how an agent navigates the desktop and automates repetitive tasks for specific interactions

▸ SpiceCSM focuses on integrations that pull and push appropriate data from multiple systems

### REPORTING AND ANALYTICS
Effective reporting includes consolidated data from every integrated component of the desktop. The primary focus is desktop analytics, which provides event logging to understand the agent processes. An analyst can then
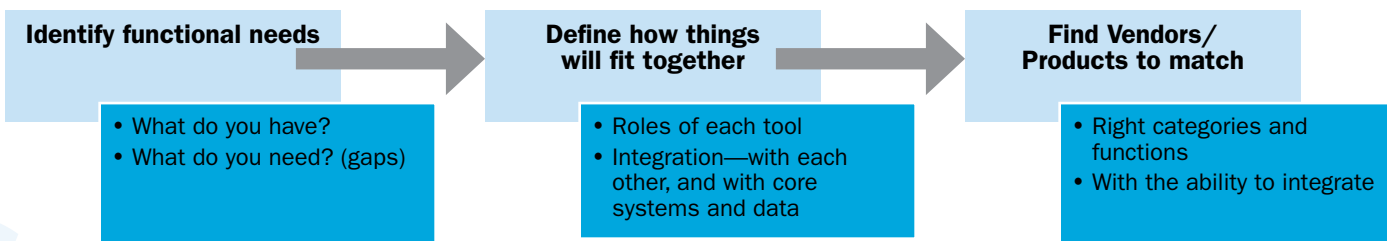
identify training, coaching or other actions to deliver those benefits outlined earlier. Some systems also offer speech and text analytics to reap additional insights and value from customer communication.

## INTEGRATION WITH OTHER DESKTOP TOOLS

Integration is a key enabler of an optimized desktop and must be factored into the selection processes when pursuing the types of functionality and tools outlined above. Envision these applications integrating with core data systems such as ERP or customer information systems, billing, reservations or appointments, order processing, inventory, policies and other applications specific to the business. In addition, an optimized desktop will require integration with collaboration tools such as Instant Messaging and presence, which have become common in the enterprise and contact center. Collaboration tools enable quick access to subject-matter experts (within the center or elsewhere) for first-contact resolution.

**FIGURE 2:** The Path to a New Desktop

| Identify functional needs | | Define how things will fit together | | Find Vendors/ Products to match |
|---|---|---|---|---|
| • What do you have?<br>• What do you need? (gaps) | → | • Roles of each tool<br>• Integration—with each other, and with core systems and data | → | • Right categories and functions<br>• With the ability to integrate |

## Navigating The Market Landscape

Different paths are emerging as options to address the agent desktop—from UAD vendors, CRM vendors, and desktop automation and integration vendors. The latest buzz is vendors pushing the "Customer Engagement Hub (CEH)" as they try to solve some of the challenges in bringing it all together with core contact center technology in pursuit of the *omnichannel* vision.

A variety of vendors are addressing agent desktop issues and, in some cases, position it as part of their primary value propositions. However, you have to define the functionality you seek as well as the integration requirements to look for the right solution type and associated vendors (SEE FIGURE 2). And as you'll see, some of the vendors fit into multiple categories and address a combination of the key functional needs outlined above. Any of them can provide integration along with some level of workflows and reporting.

### UAD VENDORS

UAD vendors unify the various desktop applications and provide access to data from multiple applications. Pulling data together provides customizable views on customer data and interaction history across all channels. Look at these vendors when the primary goal is to clean up a messy desktop that currently accesses many different systems.

UAD typically use a browser-based interface that is configured for each contact center and its wealth of systems, processes and media. Vendor examples include SpiceCSM, RiverStar, Openmethods, Jacada, Cicero and Amdocs, among others.

### CRM

CRM vendors focus on delivering account information along with an omnichannel view of customer interaction history. Look to CRM when working with other departments to track customer activity and needing a total view of the customer from a sales, marketing and service perspective. Examples include the top CRM vendors such as Salesforce.com, Microsoft, Zendesk, Oracle and SAP, as well as KANA, eGain and Amdocs.

### DESKTOP PROCESS AUTOMATION AND INTEGRATION

Desktop automation and integration vendors focus on user friendly process optimization by eliminating redundant and manual work. Look to desktop automation vendors to improve efficiency for multiple repeatable tasks during interaction handling. Vendor examples include OpenSpan/PegaSystems, Jacada, Amdocs and Panviva.

> **You need to think about what you have, what you need, where it will reside, and how it will be applied.**

## The Path to a Better Desktop

Whatever you decide on as the path to "fixing" the desktop, the following three activities will be foundational to your optimization projects from start to finish.

**PROCESS DEFINITION AND PRIORITIZATION** is the first step in identifying opportunities for efficiency. Look at end-to-end processes. (Tear down those organizational silos!) Identify quick hits and the changes that are the biggest pain points and highest potential value as your starting point. Build dynamic process flows, recognizing that your business doesn't stand still and that many actions depend on multiple factors (data and business rules).

Consider **USE OF DATA** in all stages of customer contact. You need to think about what you have, what you need, where it will reside, and how it will be applied. Data is the linchpin to optimize customer identification, routing and contact handling, delivering the most efficient interaction and effective customer experience. Data plays an additional critical role in follow-up analysis and optimization of upstream and downstream activities.

Create a mindset of **CONTINUOUS IMPROVEMENT.** Desktop optimization is not a one phase project. Put the tools in place to leverage and assign qualified, trained analysts to create new workflows, add integration, analyze and use data to optimize efficiency and the customer experience. ◉

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