

# INTERNAL TOOLS TRANSFORM COMMUNICATION AND COLLABORATION

Optimize the use of communication and collaboration tools to gain real value in effective contact handling.

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**T**ools to aid internal communication are pervasive within corporations and contact centers. Possibilities include core capabilities of the ACD system, corporate instant messaging (IM) and presence solutions (e.g., Microsoft Lync), and document and knowledge-sharing tools (e.g., SharePoint). This article explores the potential for these tools to transform communication and collaboration, leading to improved contact-handling processes, operational optimization and accelerated staff development.



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### Tools

Most corporations have an **instant message** application to enable text chat among users that also includes **presence** visibility to show who is available. Ideally, these tools integrate contact center work states with user presence so agents can tap into defined groups or individuals with specific skills. The IM application can include **shared screen or video** functionality, as well.

Contact centers need to make metrics goals and current status or performance visible to the agents. Passive presentation of metrics is not just about **wallboards or desktop phones displays** of calls in queue or oldest call waiting. Today, the desktop application provides a **dashboard** that displays center and agent performance with more information than the traditional tools allowed. For example, dashboards can incorporate quality scores and data imported from a CRM application. Many enable drill-down into the data and options for customization, including visual indicators such as color codes for threshold alerts and graphics for ease of understanding.

**Ticker-tape** messages across wallboards or desktops are another way to share metrics along with targeted motivational messages, birthday/anniversary greetings, reward acknowledgements or other news to share. Ticker-tape messages offer a method for top-down communication from contact center and corporate leadership.

Don't forget about your core ACD functionality. Most contact center technology solutions offer two ways to connect supervisors and staff: **barge in** from the supervisor to help agents during a call, and a **request for assistance** button (call and/or IM) for an agent to use when he or she needs help.

Many current contact center technology solutions offer **mobile apps** for supervisors to use on their tablets (usually compatible with Apple iOS and Google Android devices). These mobile apps enable the reporting tools to go with them everywhere they go so that out of sight is not out of mind. Based on our research, these tools offer visibility into current metrics, and we eagerly await additional functionality to communicate with agents.

As you search your available internal communication tools, include **document and file sharing**. This category can include a wiki or knowledge management application, an internal web portal or "intranet" site, or SharePoint, which has become a standard in most organizations. The "home page" displayed on login can share key current information or notices of updates and new information. The document sharing tool should be a source of various information and knowledge sources for agents.

Perhaps you're feeling good about this list since many of these tools are available in contact centers and businesses. To optimize the use of these tools and gain real value in effective contact handling, it is important to review who needs these tools in the contact center and why, and how to effectively use them.

### Users and Uses

As with most technology in the contact center, availability does not always mean optimized usage. So let's focus on the requirements for internal communication and collaboration, reviewing the two-way street between frontline staff and their leadership and support resources.



FIGURE 1: Communication and Collaboration Are Keys to Success

**Agents** collaborate with or obtain quick, targeted information from peers, escalation resources, corporate subject-matter experts (SMEs), and/or supervisors (or team leads). Agents can be motivated by knowing what their (or their team/center) goals are and being aware of progress toward those goals. They can also receive or share information, files or updates to ensure that they stay current. All these requirements focus on enhancing their ability to achieve first-contact resolution and meet performance or development goals.

**Supervisors and team leads** collaborate with or provide rapid answers to frontline agents for first-contact resolution. They should know whether goals are being achieved and communicate status to frontline agents—proactively or reactively. They use information to continually motivate frontline agents. Tools can also enable more effective coaching, whether real-time, weekly or monthly. Supervisors and team leads regularly receive information, files and updates that must be passed on to the frontline.

**Support functions** such as a command center, workforce management analysts, trainers and quality monitoring collaborate with supervisors on intraday performance, performance trends and agent feedback for coaching. They report on performance goals. They share up-to-date information and training tips. They may also work with IT to provide updated information on system status, issues, and workarounds.

Figure 1 shows that communication and collaboration opportunities extend beyond the boundaries of the center.

# Internal Tools Transform Communication and Collaboration

TABLE 1: Top Internal Communication and Collaboration Tools

TOOL	PURPOSE	VALUE
<b>Instant message/presence (including ability to share screens)</b>	<ul style="list-style-type: none"> <li>▶ Access other resources in the center or elsewhere in real time</li> </ul>	<ul style="list-style-type: none"> <li>▶ First-contact resolution</li> </ul>
<b>Metrics visibility; dashboards</b>	<ul style="list-style-type: none"> <li>▶ Inform agents on current performance</li> </ul>	<ul style="list-style-type: none"> <li>▶ Reinforce performance goals</li> <li>▶ Motivate agents to achieve KPIs</li> </ul>
<b>Ticker tape</b>	<ul style="list-style-type: none"> <li>▶ Share relevant updates that impact contact handling or team performance</li> </ul>	<ul style="list-style-type: none"> <li>▶ Inform agents in real time</li> <li>▶ Motivate agents</li> </ul>
<b>Core ACD; barge in and assistance request</b>	<ul style="list-style-type: none"> <li>▶ Quickly connect supervisor or other resources and agent</li> </ul>	<ul style="list-style-type: none"> <li>▶ Coaching and development</li> <li>▶ First-contact resolution</li> </ul>
<b>Document and file sharing (e.g., wiki, knowledge management, SharePoint “intranet” or “portal”)</b>	<ul style="list-style-type: none"> <li>▶ Provide access to information required for effective contact handling</li> </ul>	<ul style="list-style-type: none"> <li>▶ First-contact resolution</li> <li>▶ Minimize handle time</li> <li>▶ Accurate and consistent contact handling</li> </ul>
<b>Mobile apps for supervisors</b>	<ul style="list-style-type: none"> <li>▶ View real time center performance—wherever and whenever</li> </ul>	<ul style="list-style-type: none"> <li>▶ Effective management and being in tune to current state even when not on center floor</li> <li>▶ Effective use of resources</li> </ul>

**Subject-matter experts (SMEs)** in other departments can be the most difficult internal resources to tap. Contact center agents often need to contact SMEs for answers on immediate questions for first-contact resolution. If first-contact resolution is not achieved, then SMEs may handle escalations. Updated status and knowledge sharing are critical to frontline success.

## The Time Is Right

Internal communication and collaboration have always been critical to contact center success, but the availability of tools and user demands make it the right time for renewed focus. Tried-and-true manual methods, such as supervisors walking around, are no longer enough. With remote agents, dispersed centers, outsourcing partners, centralized support resources and widely scattered SMEs, resources are often out of sight. In addition, the contact center environment is increasingly dynamic: in the information flow about products and services, and in the customer needs, expectations and opinions expressed through increasingly diverse channels. The need to communicate is more immediate, among more people, in more diverse locations. Luckily, most employees are more technologically savvy, and tools are more readily available and user friendly.

## The Path to Optimization

Enhancing agent access to support—whether supervisors, SMEs or up-to-date knowledge sources—is the place to start to maximize the value of communication and collaboration tools and processes. Resources within the center have shared goals and are motivated to support contact handling. They can be tapped in better ways, using the tools outlined above, for faster, less disruptive support that leads to first-contact resolution. Communicating with SMEs outside the center can be more complex.

There is a continuum of options for connecting other enterprise resources. On one end, SMEs log in as contact center agents (routinely or for scheduled blocks), ready to become part of an interaction. On the other end, SME availability is ad hoc, and presence and IM become critical tools. External SMEs rarely want to be “tied down,” but the latter end of the continuum drives more escalations and reduces first-contact resolution. In either instance, the tools (e.g., phone and ACD queue, or presence, IM and collaboration) are the easy part. The challenge is defining the rules of engagement for connecting with SMEs for contact-handling support. Optimizing is more of a challenge when the organization and/or the departments involved don’t have the same commitment to customer support. Success demands executive sponsorship for a focus on the end-to-end customer experience and holding all stakeholders accountable for achieving metrics.


The second step toward optimizing is evaluating how tools can help internal communication. Within the center, individual and team performance improves when high-quality, timely, passive information (e.g., metrics, goals and status) is delivered to the desktop along with current issues and updates. It keeps everyone current and on the same page. Supervisors can inform the team or individuals of emergent changes or issues. Peers can use IM for quick questions or add info to wikis to help the entire team. Supervisors and support resources can use a variety of tools to inform the center of what they see going on in their reports and monitoring tools. Documents can be added to intranets or SharePoint for broader corporate information sharing, especially for projects or to inform on key changes in process.

Table 1 summarizes the key tools and their purpose and value in optimization.

### Face the Challenges

While all these tools present exciting opportunities, they aren’t without challenges. Here are some typical challenges that are readily tackled:

- Centers often limit access to IM/presence tools due to concerns about abuse (e.g., personal chats or other inappropriate communication). These limits are self-defeating. The key to success is defining use rules and limiting access to the “right” people.
- Overuse can drive constant information streams that are ignored. Tools must be used wisely based on established guidelines and reinforced through training and coaching.
- For connections beyond the center boundaries, we’ve already noted that executive sponsorship is required to drive optimization.

To ensure success in effectively using internal communication and collaboration tools, plan ahead and define the required processes, training and reinforcement. Obtain user input to ensure buy-in and use a formal change management methodology to help get everyone on board with helping the customer, using resources and information properly, and complying with processes and policies. Change management can also be used to address other department reticence to help. 

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## TECHNOLOGY SOURCING AND INTEGRATION CONSIDERATIONS

**PERHAPS THE MOST IMPORTANT TOOL** for effective internal communication is the IM/presence application, which can include screen sharing. The contact center solution can be extended throughout the enterprise through “business-user” licensing, but that is an uncommon scenario. The contact center may source their technology from a different vendor than the enterprise. For instance, the contact center may be using Avaya, Cisco or Interactive Intelligence, while the enterprise uses Microsoft Lync. Decisions must be made on which tools will provide the internal communication with the contact center. For many organizations, integration with Lync is the key.

Many premise and cloud contact center solution vendors integrate with Lync, however there are varying degrees of integration. For example, there can be a native Lync integration based on a Unified Communication Management API (UCMA) development platform. There can be a SIP-trunked integration with UCMA for presence while calls pass to another system. There can be a separate ACD system “trunked” to Lync via SIP or TDM. The following list gives some example vendors in each category (follow the Microsoft website partner list for updates):

- Native: prarieFyre (now Mitel), Clarity Connect, Zeacom
- SIP-integration: Interactive Intelligence, Aspect, Genesys, Altigen
- Others listed: Luware, Computer Talk, Geomant

Microsoft Lync is not the only solution available to the enterprise. Other enterprise telephony vendors offer their own IM/presence including Cisco Jabber and Unified Personal communicator, Alcatel-Lucent OpenTouch, Avaya Presence Services/one-X, and Siemens OpenScape.

For scorecards and dashboards on the desktop, you can source from your ACD reporting vendor or a separate analytics tools. ACD vendor tools may not easily integrate other data. A performance suite vendor may have an analytics tool that pulls their QM and WFM data, and can integrate other data from your ACD or other systems. A full analytics solution can deliver enhanced functionality but requires greater resource commitments to implement and secure ongoing value.

There are also desktop considerations for creating the agent “cockpit.” Where does the agent see their performance information (including those scorecards and dashboards) and the resources they can tap? Is it integrated with CRM/CIS or other tools, or a separate application? Ideally, an integrated desktop is designed with user input to optimize results.

## CREATIVE EXAMPLES

**WE’VE COMPLETED HUNDREDS** of projects and perhaps have “seen it all.” Here are some good and not so good examples of internal communication.

### Creative but not so good (low tech)

- Red flags raised at the desktop, standing up until someone comes or holding up your hand: All require line of sight.
- Plethora of emails with constant updates: No one reads or retains it (or can find it if they do retain it!).
- Cover page on intranet with changes: It never gets cleaned up, there is too much information and/or it becomes a transient source of information.
- Hardcopy cheat sheets passed around: This “tribal knowledge” may not be accurate or current.
- Hardcopy reports produced and distributed periodically (or even posted on the wall): Often ignored as the measure of success seems to be report production and delivery.
- Whiteboard messages on supervisor cube wall: Doesn’t get seen or updated.

### Creative and oh so good! (effective use of technology)

- Supervisor assistance button through agent interface sends IM to designated support resource for real-time response.
- Team IM so other agents can respond when supervisor is not available; bonus is everyone learns from the response.
- Call (via assistance button or dialed number) to supervisor or escalation queue.
- Agent scripts begin with latest process changes in red so agents are aware of updates.
- Agent dashboard with team goals and individual performance.
- Intranet/SharePoint with CSRs adding content.
- Message “ticker” to wall board and agent desktop.
- TV-type display with important items (updated daily).

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### About Contact Center Pipeline

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