CONTACT CENTER PIPELINE
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COLLABORATION JUST MIGHT BE YOUR SILVER BULLET

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Contact Center pipeline

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Proper use of the tools that you may already have on hand can enhance efficiency and effectiveness for all.

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A few universal truths guide contact centers, and one is that everyone seeks "efficiency and effectiveness." Efficiency includes timely responses and (relatively) short contact handling. Effectiveness means those responses are consistent and correct, and therefore bring closure. Lots of time and money gets spent in pursuit of these fundamentals, and yet the *simplicity* of these concepts gets betrayed by the *complexity* in achieving them.

Self-service is imperfect, and the all-knowing agent is a pipe dream. But we can still make real progress using some straightforward, low-cost desktop tools to enhance efficiency and effectiveness for everyone's benefit.

It's a Jungle Out There!

When customers call, they inevitably want answers or resolution, and they want it quickly and easily; agents want to give it to them, too! Your goals and customers' goals align:

- Reduce hold time and handle time
- Achieve first-contact resolution (FCR—more simply, "closure" to them)
- Provide/get a speedy response that everyone can be confident in

Companies try to keep their agents current on the latest developments by sending email updates on a regular basis. Unfortunately, agents generally don't have time to read them, let alone absorb and remember the details. So they each cobble together some sort of system to help them refer back to their library of mail. Or they simply throw up their hands and rely on their own resourcefulness to get the job done.

Despite all these great intentions, responses come slowly as agents search for information and answers. They may consult a bunch of resources, sometimes pinging multiple people sequentially (and the clock is ticking...). They instant message, call, even go "walkabout" to track someone down. When they fail, they may resort to the dreaded, "Someone will call you back." Or they may go with a "best guess" that may or may not be accurate and is likely inconsistent with other agents' best guesses.

It's bad enough when these issues are contained within the center, but it's even worse when the center relies on groups or individuals in other departments. They may convey a "don't bug me" attitude and avoid real-time communication. If the center must use email to hand off inquiries, they quickly lose tracking and insight into follow-up and closure. We literally have centers tell us that the back-office groups ask to be emailed "so they can dodge accountability." Oh dear! Clearly, that is not meeting the simple, common goals outlined above. And the unnecessary follow-up, call-backs and phone tag it creates is hardly customer-focused, efficient or effective.

The Solution May Be Close at Hand

There never really seem to be silver bullets to common problems. But most centers we visit these days already have multiple instant

messaging and collaboration tools. They may be available through corporate initiatives or center-focused technology. They may even come accidentally, as part of another solution.

At their most basic, collaboration tools show "presence" (status and availability) and allow people to Instant Message (IM, aka chat) with each other or a group. Some tools integrate presence with the work state in the ACD. They may also include features such as screen-sharing, file-sharing, co-editing, conferencing (voice, desktop and video). And they may integrate with a variety of other tools, such as shared calendars, workflows, and click to call or chat.

Here are examples of where we see them—and where you might go looking for your opportunities:

- **PART OF THE DESKTOP SUITE:** The most common option in this category is, of course, Microsoft Office. The collaboration tool has evolved from Skype for Business to Teams, which has features in line with the most robust collaboration tools, perhaps driven by competition from some of the point solutions such as SLACK (more on that in a second). Google's G Suite offers similar capabilities.
- **CRM:** Tools like Salesforce, SAP, Oracle, Zendesk, Microsoft Dynamics, Sugar, Zoho and more may have chat (IM) capabilities (or integrations), at a minimum. It may be an inherent part of the tool or an add-on/option.
- **PBX/ACD/UC:** Most vendors, whether premise or cloud, offer a messaging tool with their licenses. Think Avaya, Cisco, 8x8, RingCentral, etc. It is typically a Unified Communications feature, and therefore more likely to be used enterprisewide, but can be Contact Center only as well. CC Software may also have an internal chat that is just like what is used for customers chatting on the website.
- **SLACK:** I call this one out specifically because I view it as transformative—both for users and for the market. They offer a free version that many jumped on to experiment (sometimes without the powers that be knowing about it!). IT departments started using it. It took off. Part of its differentiation was "persistent" conversations—ones that didn't go away when the conversation ended and someone closed the window. Users can create workspaces on various topics, with invited members, inside or outside the organization. The conversation history becomes even more valuable as it is searchable, can be organized into topics, and can have a variety of other resources associated with it (e.g., web links, documents, notes).

Get Everyone on Board

Chances are you have a bounty of tools. Now you and your colleagues in other departments need clear processes for how to use them. That is undoubtedly easier in the CC where you have more control and harder when you go into the broader corporate ecosystem, but you need to tackle both. Build awareness through education. Show the impact on the customer and impact on the company, including added cost when not providing timely, consistent, accurate answers. Create accountabilities as part of the process definition (more on this in a minute). And perhaps most importantly, find executive sponsorship from someone who is responsible for and cares about the customer experience and the bottom line. This is a prerequisite to get the others to engage in real-time.

Pick the tool (or tools) and train (then reinforce training!) on how they should be used. Ideally, pick one tool for real-time communication, and set up the appropriate workgroups and notification structure (sounds and/or pop-ups). Provide clarity on when to call and when to message, using IM for simpler inquiries and calls for more complex (but still real-time) needs. Don't get caught in the trap of having too many tools and real-time notifications going off on each desktop.

Enterprisewide tools are best when you have routine communication needs beyond the CC boundaries. Set up groups and identify the members. If you have separate tools for CC vs. UC, define how you will communicate within the center and to other groups. Nobody should have to try multiple people or channels.

Use email to communicate information that doesn't have real-time needs, is lengthier, or requires some other non-urgent action. Then turn off real-time notification of email arrival in the contact center (I know, gasp!). Better yet, reduce or eliminate the use of email for communicating key information about solving customer needs; implement knowledge management for that purpose (**SEE SIDEBAR**). Use a ticketing tool or CRM for *trackable* escalation (NOT email) to add to the accountability of those outside the center (I know, more gasps!). Remind them that their timeliness and responsiveness impact the customer and the center.

Delegate non-business things (like birthdays and recognition) that are important for culture and teaming to a persistent shared space without notification. Everyone can still get the information and participate in the celebration without it being a distraction to the job at hand.

One good option for real-time communication in the CC is a "Help" queue. Schedule Leads and Supervisors to staff it and ensure timely response. If there are off-hours without coverage, provide clarity for agents on how their process will work when this resource is not available. For example, you may offer a (formalized) help access with a Peer group, or rotating responsibilities among the more senior agents that prepare people for the next level in the center.

When tackling the needs that go outside of the CC, start by understanding what works today for tapping these resources. Much of it may be individual to individual, often based on relationships (e.g., someone who used to work in the center). Look at how those relationships can be extended to the team, creating an equal playing field for delivering an efficient, effective experience. Then work with your counterparts in other groups to define how to provide accessibility in real-time where there is a critical need. You can approach it much like the internal CC

TABLE: Use the Right Tools for the Right Purpose

TOOL	TIMEFRAME	PERSISTENCE	BEST USE
Email	Non-Real-Time	Persistent	• Communicate non-urgent information that does not need to be referenced ongoing
Knowledge Management	Real-Time	Persistent	• Catalog and manage reference information to be used by a group • (Searchable and bite-sized information, kept up to date)
Instant Messaging	Real-Time	Transient	• Quickly communicate one-on-one or one to a group—an update or basic inquiry
Calls	Real-Time	Transient	• Quickly communicate one-on-one—for a more complex inquiry
Collaboration Workspace	Real-Time and Non-Real-Time	Persistent	• Quickly communicate one-on-one or one to a group—an update or basic inquiry • AND—be able to access those communications and information that is posted there in response (e.g., processes, knowledge snippets, links to information)
Ticketing System/ CRM Service Module	Non-Real-Time	Persistent	• Handoffs and Escalations • With Tracking and Performance Accountability

You Can Preempt the Need for Communication!

We love communication and collaboration tools that contact centers use to deliver better service. But the reality is, agents struggle because they can't find answers at their fingertips. They are reaching out because they can't solve a problem. They don't have, or can't get to, information they need or they lack system access.

A good knowledge management tool and processes for keeping it up to date is the first line of defense. Bonus—chat and collaboration can help identify KM needs! While not a trivial undertaking, knowledge management can deliver great benefits in efficiency and effectiveness. If you want to dive into this possibility more, check out our article, "You Can't Afford Not to Pursue Knowledge Management," *Pipeline*, October 2018.

A little license inventory may be in order as well. Ask your agents how often the lack of access holds them back and starts the chase for someone to help. Then maybe you can make the case for more licenses!

help desk concept. Identify which groups are of high enough demand to justify real-time accessibility. Define similar rules of engagement and "plan B" for when nobody is available. Less time-critical needs should still have a clear process and definition of how to use the tools.

Use Metrics to Prove the Benefits

Benefits are demonstrated when you put accountability metrics in place. You should see key indicators like handle time, hold time, FCR, VoC and even NPS improve. (Folks won't "promote" a company's service unless they get timely closure!) Don't forget the metrics specific to the new processes, such as response time on help queues and closure time on tickets (escalations). Then quantify the *savings* from efficiency and the *value* from effectiveness.

Coming Soon to a CC Near You…

While you won't turn all your agents into superheroes, the proper use of these desktop tools—which you probably have, or could have, for little or no cost—can enhance efficiency and effectiveness to the benefit of all. You can watch your customer experience soar while your agents gain confidence and knowledge. The revamped processes will improve your bottom line, as well as a variety of metrics that reflect your customer experience and the inner-workings of your center and enterprise.

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