CONTACT CENTER PIPELINE
MARCH 2019

WIN THE FIGHT FOR A BETTER DESKTOP

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Contact Center pipeline

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Build awareness of the risks and impacts of a bad desktop.

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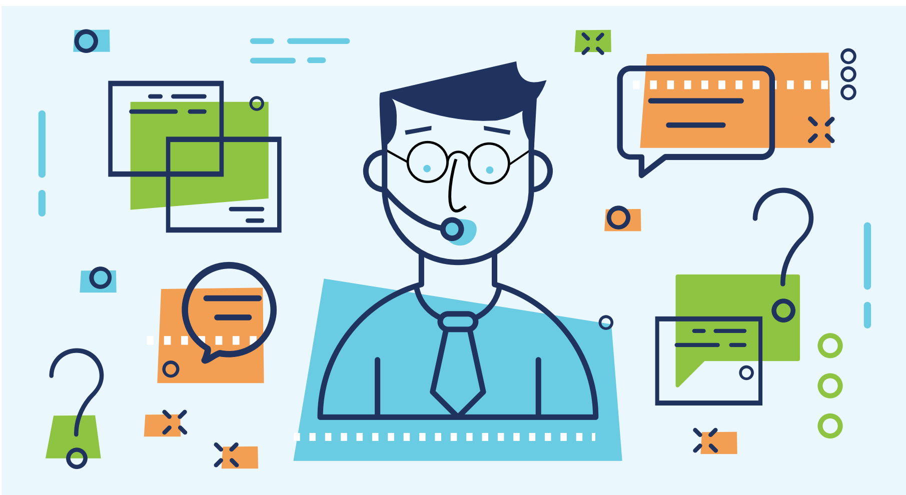

It jumped out at me as big news: "Lack of and/or bad desktop tools (CRM, KM, Collaboration, etc.)" took the No. 1 spot on our challenges list for 2019 (see "Contact Center Challenges & Priorities for 2019," Pipeline, January 2019). About 20% of participants put this in their top three challenges.

That data confirms what we see in countless projects. Centers have *many* applications, from core applications for things like customer records, billing and inventory, to Customer Relationship Management (CRM), to a plethora of communication tools. They also have *messy* applications that are not integrated or well suited to the workflow of the contact center. Gaps in key functionality such as knowledge management or contact tracking add to the pain that "lack of and/or bad desktop tools" creates.

For too long, centers have had to live with what they were given, and good people found a way to make it work. But these desktops really don't support efficient or effective contact handling. And, it is getting worse as centers support more customer-facing channels, every new tool seems to bring another way to "chat" internally, and companies that purchase cloud solutions sometimes skimp on licensing.

Show the Misery of Life with a Bad Desktop

I am going to propose a tactic that is antithetical to many contact center leaders' tendencies. You need to *stop the heroics* of making it work and show what it's really like. You need to build awareness of the risks and impacts of a bad desktop, and show your business and IT leaders that you have a problem!

Without good desktop tools, agents find their own way, and that may not be good! Some use copy and paste, while others are typing (or scribbling!) notes. One agent is jumping into Skype or Teams sessions, while another finds resources through the CRM chat tool. Others have set up a Slack channel while somebody else is trying out the chat in the new cloud solution! A variety of "cheat sheets" circulate—whether electronic or printed—and tribal knowledge is shared among those with proximity or affinity. All this personal navigating makes consistency and compliance nearly impossible.

The bad desktop tools and associated behaviors directly impact performance and contact center costs. It's easy to look for symptoms such as long training times and time to proficiency, or long and inconsistent handle times. As agents click away on deep paths or bounce around to various applications, the clock is ticking. Every login (and timeout, and login again) has a price tag in precious seconds, not to mention frustration and mind-numbing tediousness that does not boost the very hot priority of employee engagement. Centers that long for universal agents (which is the most efficient!) are often forced into artificial segmentation that is driven by application access or competency.

While the reliance on others—whom agents reach in various ways—can build valuable relationships across the center or the enterprise, the inconsistency in who is providing answers to whom, via what tools, means a lost opportunity for consistency and continuous improvement. At best, the bad desktop introduces more chances for errors. At worst, it fuels security and compliance risks.

How to Create a *Better* Desktop

Clearly, it doesn't have to be this way! Options to integrate and simplify the agent's world, and improve the outcomes of each contact, abound. The improvements can be measured in efficiency, as well as service and sales effectiveness. (**SEE FIGURE 1.**)

CRM is an option for those that have it or are considering it (typically for other reasons). A "unified agent desktop" (UAD) solution can be a transformational tool for those not ready, willing or able to tackle the bigger goals of a CRM project. A UAD can provide "CRM-lite" capabilities while helping to address the mess that I described earlier. While "build" is not usually our preference for anyone to solve contact center technology problems, bigger shops with a strong IT department could consider such an approach.

In any case, contact center leadership needs to work with IT on a requirements and planning effort that focuses on the workflows and integration needs of the contact center. An inventory of the tools in use today, along with what information is needed and where it resides, gets things started. Use the top contact types to outline what happens today. Then it's time to *question everything* as you envision a new desktop.

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I like "phoenix" exercises for projects like this, imagining what that desktop would look like if it were built from scratch, specifically to meet the needs of the contact center in handling the various contact types. The CRM or UAD or newly built desktop can become the "cockpit" only if approached with that goal and with an open mind to how to change the way agents navigate and

FIGURE 1: You Can Make the Case for a Better Desktop!

"TYPICAL" DESKTOP	BETTER DESKTOP
• Many applications	• Few applications
• Isolated applications	• Integrated applications
• Lots of logins… and timeouts… and login again	• Single sign on; timeouts balance security and performance
• The *Agent* is the integration point	• The *Systems* are the integration point
• Individuals finds their *own* way to access information	• Consistency, compliance and accuracy for all
• Long training time	• Shorten training and time to proficiency
• Long time to proficiency	
• Long Average Handle Time	• Reduce Average Handle Time
• Risk of errors and non-compliance	• Reduce risk of errors and non-compliance

access the information needed to address various customer needs. You may even realize you don't need some legacy systems (gasp!) as they linger only for small amounts of information that everyone knows just needs to be moved somewhere else.

While you're cleaning things up, don't forget about gaps. One of the most common ones is knowledge management (KM), because the SharePoint sites and "intranets" or "portals" that have been cobbled together often aren't cutting it. This topic is worthy of its own article (and you can find one in the October 2018 issue of *Pipeline*!), but you can't pursue the "best" desktop without considering the role KM plays. Agents need it to succeed, particularly in environments with complexity and diversity in products and services, and/or with constantly changing information (and those environments are common these days!). Key characteristics include good search capability, "bite-sized" info that can be consumed quickly in the real-time world of a call, feedback loops and continuous updates.

Omnichannel is another key element of a better desktop. We have touted the benefits of common routing engine many times. It creates one place where agents go to manage contacts (login/logout, change workstates, get the next contact that matches their skills, have visibility to their performance and the current status across media, etc.). It also helps manage the distribution of workload—routing, reporting, planning, scheduling, etc. But the reality is centers have to make decisions between ACD and CRM, as well as standalone solutions (e.g., for chat), because of the mix of tools in place.

So, when it comes to your pursuit of a good omnichannel desktop, carefully review the options that make the most sense for your environment based on what you have (or are pursuing) and how you manage contacts and the associated agent skills. Strive toward a common routing and reporting engine but adapt where needed and make sure the processes and organizational plan align with the technology choices (so the burden isn't on the agent). For example, some people separate the "digital channels" (email, chat, text/SMS) and may manage all of them in a

Quick Hits to a Better Desktop

There are things you can do *right now*, without big projects or budgets. Here are a few of my favorites:

- If agents have only one **MONITOR,** see if they can get a second. It can be one of the easiest ways to drive some efficiency and accuracy, and your agents will love you for it.
- Establish consistent **PROCESSES** on how to use notepads, written notes, IM tools—for security, efficiency/accuracy, responsiveness and tracking.
- Give **LOGINS** to the right people to ensure visibility to the right applications and information. The motto is "none of the ones I don't need, all the ones I do need" to reduce clutter and facilitate timely first-contact resolution.
- **SINGLE SIGN-ON** is sometimes a bigger effort but it's become more commonplace and there are tools that can help. Don't be afraid to push this one with IT.
- Review **TIMEOUTS** on various applications and set them to balance security and performance in the contact center.

CRM solution, while voice is managed separately in the "phone system." Regardless, your approach should avoid agents acting as the integration point. When agents handle voice and email and chat and must constantly update status in multiple tools to avoid a barrage of simultaneous contacts, they have little chance of success.

A Better Desktop Leverages Technology Changes

Keep in mind there are several things going on in the desktop world that may be different than your legacy environment. It starts with browser-based, web-enabled applications. Of course, this is how cloud solutions are delivered, and an increasing number of premise-based applications as well. That architecture eases integration for the center, including screen pops and passing information between applications instead of copy/paste.

The "CRM-lite" I mentioned from the UAD vendors could also come from ACD vendors. When you're trying to solve problems and fill gaps, a discussion about what your current vendors have to offer is a good place to start.

I also mentioned various collaboration tools, but I want to emphasize that more is not better. Centers need to pick one or, if multiple are in use, designate what is used when. The usage guidelines need to assess enterprise resources that are part of the ecosystem to solve customer issues and consider tracking and ties into other information (e.g., search against past conversations or knowledge sources).

And we've pretty much reached the point where no Tech Line article can overlook the impact of artificial intelligence. As AI works its way into the center, we'll see it help to transform the desktop as well. Virtual agents might guide what the real agents do, or provide insights based on data and patterns—working on behalf of the agent to serve (and potentially sell to) the customer.

Your Path to a Better Desktop

I recognize that the desktop challenges linger in many organizations because these are not simple things to change. And I have yet to find anyone with ample time, resources and budget for everything on their "to-do" list much less their "wish" list. Heading down this path requires an assessment of the appetite for change and investment that goes with it.

As noted, a better desktop requires collaboration between IT and CC leadership. It may also require engagement of compliance/risk/security people. Bring them all together to drive a path to the better desktop. Don't go searching for answers (and point solutions) in silos. Assess what you have and what your vendor partners have to offer. Get ideas from the center to identify pain points and opportunities, and ask, can we do this? Then seek input from IT. The best results will come when you get creative about how to address the ideas, looking for quick hits (**SEE THE SIDEBAR**) and then defining the longer-term IT plans. Expect a reasonable review from compliance/risk/security, with awareness of impacts and tradeoffs. Emphasize the contact center can be different from other areas, and therefore may have different needs and solutions. For example, it's a secure area, and agents are pretty much at their desks, so can we get a longer timeout on certain applications?

It may seem daunting but tackling this issue can go a long way to making the desktop a better place for the agents to handle contacts, delivering benefits for the center, company and customers. Then something else can move up to the top of the challenges list!

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