SURVEYS HIGHLIGHT CONTACT CENTER OPPORTUNITIES

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Contact Center
pipeline

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Insights on resiliency, operations, technology and metrics highlight where we go from here.

BY LORI BOCKLUND, STRATEGIC CONTACT

We have the privilege of working with contact centers of many sizes, across a wide range of industries. They all have a few things in common: They want to deliver a great customer experience, meet their target metrics, operate efficiently and effectively, and use technology to their advantage.

Credit unions are a bit unique in that they are more willing than most to share information about how they are doing and what they plan to do next. Because of this openness, we have been able to survey them over the years. We recently dove deep into their response to the COVID-19 pandemic (see sidebar) and conducted a comprehensive contact center survey covering strategy, operations, metrics and technology.

Even if your center does not support a credit union, please don't abandon this article! In analyzing the survey results and formulating recommendations, **we identified clear opportunities that apply to ALL contact centers**. They merit serious consideration, especially given all the disruptions that 2020 has brought and the great possibilities going forward.

Align Strategies

I've been on my soapbox for years touting the importance of aligning the business strategy, the contact center operations strategy, and the contact center technology strategy. Strategies are aligned when:
- You can map the relationship between business and contact center goals.
- The center is equipped with (or pursuing) technology that enables both.
- Operational practices and staffing enable the center to meet target metrics.

- The contact center budget is synchronized with plans to support business growth and change.

Although there have always been clear benefits to connecting the strategic dots from top to bottom, the global pandemic has changed this persistent recommendation into an imperative. Social distancing guidelines have transformed many in-person sales and service engagements into contact center interactions. COVID "shined a light" on the importance of the contact center, and it now features far more prominently as the "face" of the organization. Frontline staff needs to be updated on their organization's latest developments, priorities and messaging, *and* have the bandwidth and tools to deliver excellent service.

Not surprisingly, many centers have seen considerable upticks in their contact volumes and handle times. We applaud the heroic efforts that contact center managers have put forth to sustain business-as-usual in a decidedly business-isn't-usual time. Centers have found the way to adapt to the increased workload while shifting a substantial percentage (if not all) of their employees to work-from-home. Senior management needs to be apprised of these dynamics and make appropriate provisions in the center's budget to support both self-service and assisted-service capabilities.

In short, given how much more important its role has become in the organization, the center needs assurances that leadership "gets it" and has their back and that of their customers to get everyone through this difficult time.

Benchmarking Surveys Shed Light on the State of Credit Union Contact Centers

Strategic Contact recently published findings from two credit union contact center surveys. Both are available for download at www.strategiccontact.com/resources/#surveys. Even if your business is not a credit union or financial services, you may find the results interesting!
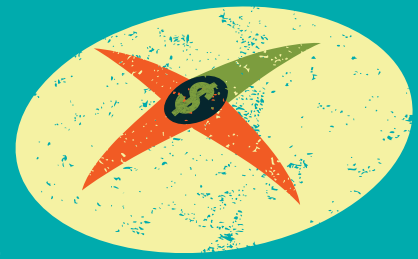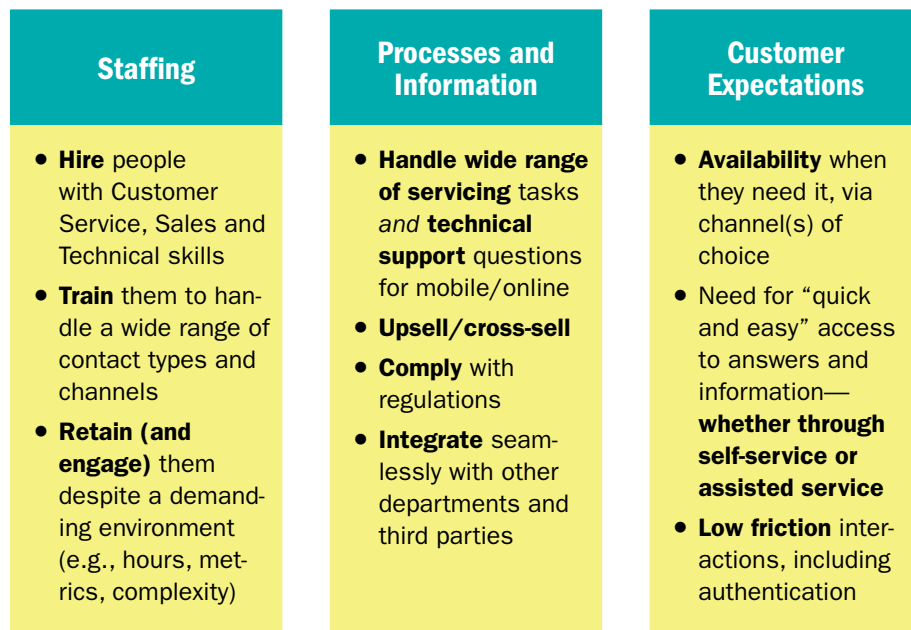
The "Credit Union Contact Center Benchmarking Survey" addresses:

- **Strategic Alignment** with the rest of the organization
- **Operations**—including organization and staffing, channels and member access, QM and WFM, hiring, training, coaching, development, knowledge management
- **Metrics**—including inbound call metrics, email metrics, chat metrics, adherence, and attrition
- **Technology Use and Plans**—including sourcing, contact center technology, performance and analytics tools, core systems, desktop tools, fraud and authentication

The "Credit Union Resiliency Survey" focuses on how contact centers have responded to the COVID-19 pandemic. It addresses:

- **Readiness** to address business disruption
- **Actions Taken** to respond to changing conditions
- **Self-Service** adjustments
- **Contact Center Staffing** including Home-Agent Support
- **Workload and Performance Impacts** (e.g., contact volume, handle time, service levels, abandon rate)
- **Challenges and Plans** going forward

FIGURE 1: It's Never Been Easy to Deliver a "Great Customer Experience"— and It Keeps Getting Harder…

| Staffing	Processes and Information	Customer Expectations
• **Hire** people with Customer Service, Sales and Technical skills • **Train** them to handle a wide range of contact types and channels • **Retain (and engage)** them despite a demanding environment (e.g., hours, metrics, complexity)	• **Handle wide range of servicing** tasks *and* **technical support** questions for mobile/online • **Upsell/cross-sell** • **Comply** with regulations • **Integrate** seamlessly with other departments and third parties	• **Availability** when they need it, via channel(s) of choice • Need for "quick and easy" access to answers and information—**whether through self-service or assisted service** • **Low friction** interactions, including authentication

Implement Process Optimization and Knowledge Management

Because process-intensive labor constitutes the vast majority of contact center costs, we can all agree that process optimization is a good thing. With the global pandemic, we now realize that process optimization also helps organizations become more resilient when confronted with unforeseen "shocks" to their markets and business models.

In working with contact centers of all sizes, shapes and locations, we've witnessed abundant frustration with all the disconnected and manual tasks—during the contact handling or wrap-up, and when work flows to and from other parts of the organization. It takes time, effort and resources to clean up the mess that broken processes leave behind. And every time there's a break in an important workflow or a muddled (or dropped) hand-off, it results in an aggravated customer and/or frustrated employee.

Process optimization becomes increasingly important as more and more employees move to home offices. Less experienced agents won't have the benefit of a nearby co-worker to help them determine appropri-
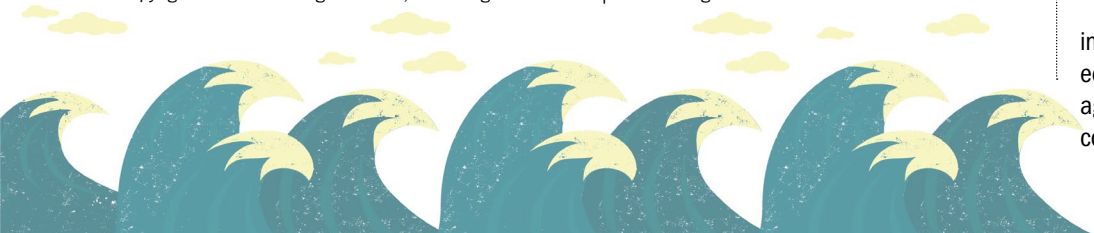
What If Your Volume Is Way Down or Unpredictable? Agility Is the Watch Word

The sad truth of COVID is that some industries have been devastated. Travel and hospitality are the obvious examples, and we all feel for our colleagues in the impacted industries. Others may not be sure if volume increases will continue.

I think the theme for contact centers going forward is *agility*. As you plan and prepare for what's next, make sure the ability to adapt your technology and human resources is front of mind. Our current situation puts extra value on things like self-service, cloud-based solutions and outsourcing partners, and may catalyze use of innovative staffing models that include gig workers. Your slate isn't blank, but you should have an open mind to new possibilities like never before.

ate actions to complete tasks. It's far less convenient to track down personnel in other departments to investigate status on open assignments. And changes driven by new products, systems or policies are more difficult to disseminate. On top of the internal challenges, customers have less patience for error given the stress and strain of our current world.

With management paying closer attention to their organization's capacity to sustain operations and meet service levels under duress, it's time to seize the moment and get the resources to tackle this issue. Be sure to assess the wide range of contacts that the center handles and the interdepartmental "ecosystem" within which it works. If you're excited about "bots" and artificial intelligence (and who isn't?!), look at how these technologies can help customers self-serve and how they can help agents comply with processes, gather appropriate information, guide the customer to the appropriate "next best action," and bring interactions to closure. Fortunately, with new tools available, process redesign can be less demanding on resources than in the past. You can target the low-hanging fruit and get some early wins without completely dismantling your current environment, and then build on the early wins as you tackle increasingly complex opportunities.

A searchable, dynamic knowledge management platform with the support resources to maintain it serves as another key strategy for improving organizational resiliency. It can enable staff (even those who aren't normally in the contact center but are "pitching in" during the workload crunch) to become proficient faster across diverse, complex contact types and reduce their reliance on other people. A "single source of truth" promotes consistency and compliance. It also provides an effective means to disseminate updates rapidly.

Pursue Technology Improvements

Global pandemic or not, customers continue to raise the bar on expectations when they interact with *your* contact center. They want more self-service across a variety of channels—web, mobile, IVR—and want that self-service to be more user friendly, with easier authentication and a more personalized experience. They want to *seamlessly* move to assisted service via live calls, chats, texts and email. All of these capabilities benefit from **omnichannel routing** that is integrated with the desktop tools to ensure that customers reach appropriately skilled resources and are accorded quick response times with low level of effort for all involved.

Cloud technology continues to gain traction throughout the industry. Concerns regarding security, control and costs are waning. Buyers have been won over by the value of agility (e.g., to support home-agents), continuous innovation, ease of integration and technology support. The quick scramble that the coronavirus triggered for many centers showed the value of cloud agility.
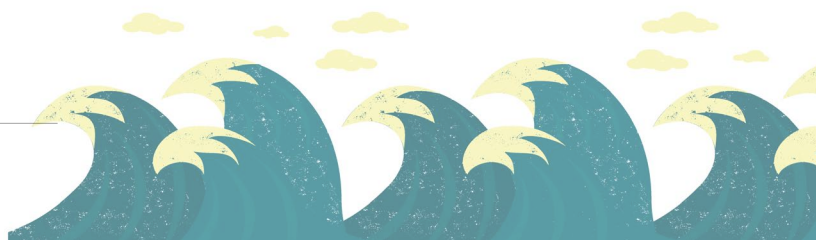
Improving the **agent desktop** still sits atop many contact center "wish lists." Too often, the agent is the point of integration amidst several isolated applications and user interfaces. This unfortunate circumstance lengthens training time, time to proficiency, and average handle time with increasing error rates and the risk of non-compliance. It's a situation that proves even more frustrating for work-at-home agents given the absence of readily available helpers. Even the situation of sending agents home with laptops, or single monitors, has compounded contact-handling challenges. Ample screen real estate is essential. Fixing the desktop can have a huge impact on handle times, customer experience and employee engagement.

Cyber fraud and identity theft are on the rise, and home agents add a new vulnerability. Contact centers need to strengthen their **authentication and fraud protection** protocols while striking the delicate balance between ease of access for legitimate business transactions and providing appropriate levels of protection for customers and the company. This is an area with lots of innovation as the good guys work to outsmart the bad guys and centers move from low-tech (and imperfect!) to high-tech approaches.
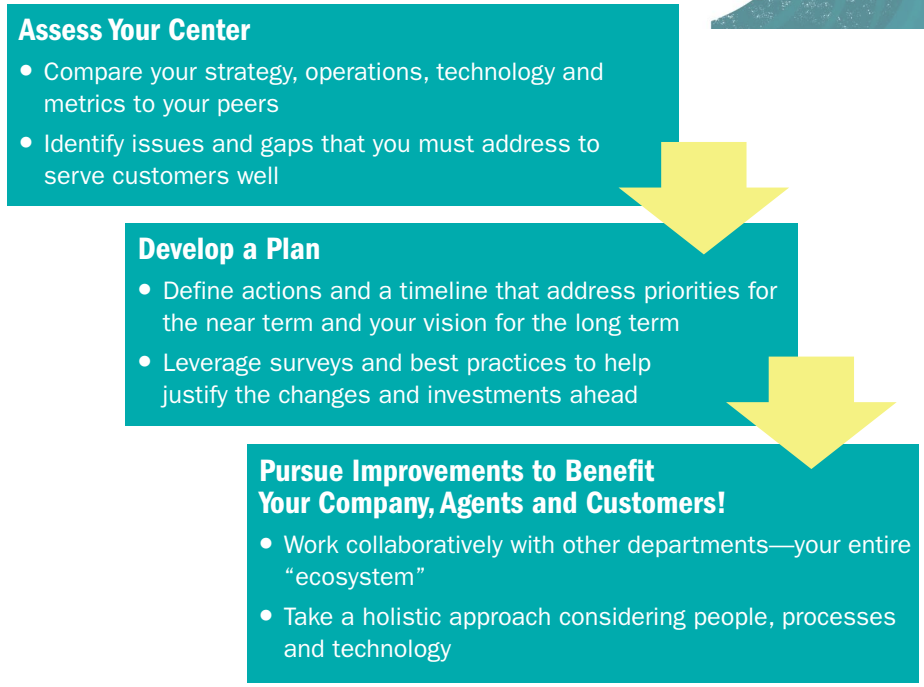
Optimize Support Resources and Free Up Supervisors

Technology doesn't deliver the desired effects if support resources aren't in place to use it well. From workforce management to analytics to knowledge management, the value proposition relies on investment in more than just licenses. The center needs skilled IT, HR, training and business analyst personnel with sufficient bandwidth to address the assigned workload and tasks. These support resources need to handle the day-to-day demands as well as one-off projects to support process changes, interdepartmental coordination and technology implementation.

With many more agents working remotely, centers also need to offload support tasks from supervisors so they can refocus on training, coaching and transactional support. They are the organization's "eyes and ears" to assess the center's and staff's ability to adapt to changing dynamics and the asso-

FIGURE 2: Where Do You Go From Here?

Assess Your Center
- Compare your strategy, operations, technology and metrics to your peers
- Identify issues and gaps that you must address to serve customers well

Develop a Plan
- Define actions and a timeline that address priorities for the near term and your vision for the long term
- Leverage surveys and best practices to help justify the changes and investments ahead

Pursue Improvements to Benefit Your Company, Agents and Customers!
- Work collaboratively with other departments—your entire "ecosystem"
- Take a holistic approach considering people, processes and technology

ciated response by customers. They need sufficient time to address quality monitoring, develop agents and share their insights with management.

Develop a Plan

While it's uncertain how the coronavirus will affect the future of the contact center, the disruption in operations provides an impetus for change. Take advantage of the spotlight to initiate improvements that will benefit the center, as well as customers and employees, and make your center more agile going forward. ⦿

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About Contact Center Pipeline

Contact Center Pipeline is a monthly instructional journal focused on driving business success through effective contact center direction and decisions. Each issue contains informative articles, case studies, best practices, research and coverage of trends that impact the customer experience. Our writers and contributors are well-known industry experts with a unique understanding of how to optimize resources and maximize the value the organization provides to its customers.

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