

## **MOVING FORWARD: WHAT WILL 2021 BRING FOR CONTACT CENTERS?**

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## MOVING FORWARD: WHAT WILL 2021 BRING FOR CONTACT CENTERS?



### Contact Center Pipeline's Advisory Board shares solid advice to take into the new year.

BY SUSAN HASH

Welcome, 2021! The new year always brings hope for new beginnings. Although COVID-19 is still the central focus of our everyday lives, the contact center industry appears to be moving forward with optimism, lessons learned and plans for delivering customer service in a business environment that looks nothing like the previous years.

As Einstein once said, "In the midst of every crisis, lies great opportunity." Certainly, the pandemic forced companies to swiftly change, streamline and innovate customer service operations. There have been many positive outcomes that will no doubt shape a better future for the industry, including a deeper appreciation of frontline agents, a shift in mindset about how and where work gets done, increased visibility for the contact center's role, and a better understanding among senior leaders of its value to the organization.

Here at *Contact Center Pipeline*, we are kicking off the new year with the awareness that many contact centers will be facing constant change in the upcoming months and years. Thus, we have brought together some of the top experts in the industry to form our new Advisory Board, which will help guide our content and bring you solid advice on trending topics, new tools and practical pointers in

every issue.

What better way to introduce our Advisory Board members than to ask them to share their best advice for moving forward into the new year? Read on for insights on strategic initiatives, useful recommendations and words of inspiration from these experienced contact center, customer experience and customer care veterans.



#### MIKE AOKI

*President, Reflective Keynotes Inc.*

As a leader, you are responsible for your people. Focus on the health, wellness and emotional resilience of your team. Delivering a great customer experience also can be emotionally and physically draining, especially during these challenging times. As a contact center leader, invest in your team by encouraging them to use company-provided support services, such as employee wellness programs, financial counseling services and Employee Assistance Programs. Boost your team's morale through supportive coaching, relationship-building and by celebrating successes together.

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## **SANGEETA BHATNAGAR**

*Founder, SB Global*

My advice for leaders is always focused on people and the human element. It is by creating those meaningful human experiences with our team members and with our customers that will allow leaders to be of a greater impact. With different demands and challenges in the workplace, whether working at home or at the office, your customers and team members will require more servant leadership from you! It will be more important than ever to become an emotionally intelligent leader.

Leaders need to invest time to further develop their own emotional and social intelligence. Leaders will need to reflect on their own habits, blind spots and responses to stress to best serve their teams and customers.

The 21st century leadership skills required are compassion, empathy, authenticity, resilience and a willingness to be vulnerable.



## **HEATHER BISSELL**

*Director, Customer CARE, Nordstrom*

The best piece of advice that I would share with contact center leaders going into 2021 is to expect the unexpected. Every year, we take surveys that translate into articles and white papers, with titles such as "The Future of Contact Centers" or "Contact Center Trends in 2021." I think we can all agree after this year that even the best-laid plans don't always come to be! As we look to the future, we need to pivot our thinking to not just goals that we are looking to accomplish, but also start thinking about how agile our business is if we need to quickly move away from those goals and strategies and set forth in a new direction.

As we are taking these types of things into consideration for our businesses, we also need to look to our customers more than ever to tell us how they want to do business with us. Many times, we focus on how to shift a business model and don't always think about if it's what our customers want. Ensuring that our agility extends to how we take and implement feedback from customers will continue to be a critical element in the contact center/customer service world.



## LORI BOCKLUND

*President, Strategic Contact*

I offer my best piece of advice for 2021 in two intertwined parts:

**1. Improvise.** Be agile and creative. Many years ago, I did an improv training class with my employees (and wrote about it in *Contact Center Pipeline!*). They taught us the fundamental principle of improv: Never say no, never reject an input. Say “Yes, and...” I’ve used the concept countless times with my consulting work and have seen how it applies to centers. While contact center leaders have always had to respond to whatever happens on any given day, 2020 taught us that all that firefighting was nothing compared to the pivot the pandemic required. We don’t know what’s next, but if we’re ready to improvise, we’ll get through it. And the best way to be ready is...

**2. Think—and act—strategically.** I’ve beaten this drum for years, and many of our projects are all about building strategic roadmaps. But I find that leadership focus often wanes too quickly. Projects go unfunded and wish lists stall as other items get priority for resources. Important things like resiliency planning remain a glimmer in the eye of the cautious. Again, 2020 gave us the lesson that strategic planning and investments (of money, time and resources) can pay off. You can pivot more quickly and with better support for staff and customers when you have the right tools and processes in place. Thinking strategically means making the business case for the investments and resources you need to succeed.



## COLLEEN BOLTON

*Senior Manager, Customer Experience–Quality, DraftKings Inc.*

It is important now more than ever for authentic customer service interactions through all means of contact. By uncovering and understanding what your customers’ needs are, and more importantly, what customers are afraid of, service excellence providers can tap into the skills and resources to reassure their customers that they stand in support for them and reduce any anxiety they may have. How positive a customer feels about how they have been treated is one of the foundational building blocks of customer loyalty.



## DICK BUCCI

*Principal, Pelorus Associates*

January is the month we set goals for the coming year. In our personal lives, we again pledge to lose weight, exercise more, and generally commit to a healthier lifestyle. As contact center leaders, we list a lot of objectives and soon conclude that accomplishing one may come at the expense of another. We need an overarching goal that would drag along all the other objectives with it. To get there in my allotted space, I will focus on one industry—insurance. Insurance is one of the biggest employers of contact center personnel. And what is the most important goal for insurance carriers and agencies? It is customer retention. Ever wonder why GEICO reminds us on a daily basis that we can save 15% if we only did them the honor of a 15-minute phone call? It turns out that insurance has a high retention rate—about 85%

annually. However, that means 15% are up for grabs. And it is a prize worth fighting for. A satisfied customer will keep that same insurer for a very long time, even on to the next generation.

For contact center management, the implications are many. Start with defining the key metrics. Then find out why customers defect. There are tools for this; speech analytics and voice of the customer come to mind. However, it never hurts to do the obvious—just ask them! Agents should be trained to identify at-risk customers and ask probing questions to uncover causes of dissatisfaction. Explore the power of analytics. You can build profiles of potential defectors and predict outcomes. You may be able to pinpoint business actions and agent behaviors that build customer loyalty.

Insurance is our example, but the same thinking applies to any business that relies on repeat business. And although this sounds complicated, it may still be easier than losing weight!



## TIFFANY LAREAU

*Certified Workforce Manager, Human Numbers*

2020 taught us harsh lessons about change and the cost of not being prepared. But it’s impossible to be prepared for every single situation. Many call centers were caught off guard with this pandemic and ended up spending their time putting out fires (some are still putting out fires today). Many centers are too small to have the full extensive infrastructure required to effectively handle all the changes 2020 threw at them.

There are people out there who have already gone through some form of disaster recovery, they rebound faster, and have already learned these lessons for themselves. They came out of it hardened, experienced and they have stories about what worked for them.

Creative thinking and brainstorming are great for low-risk and last-ditch efforts. But instead of trying to create a solution from the ground up, my advice is to first reach out to the digital network, the one at *Contact Center Pipeline*, the one on LinkedIn, and for other WFMers out there, the SWPP network, to collect others’ insights about the specific things you are juggling.

Are you having trouble coming up with flexible scheduling solutions for your work-from-home agents? This is a topic WFM schedulers have been discussing for decades, and we have a ton of best practices we can share with you on that.

Are you experiencing new problems with schedule adherence that you never had before now? Then check out the Power of One exercise. It’s a simple and effective way to demonstrate why every agent matters, and a good way to demonstrate how one person can make life miserable for the rest of their team when they don’t pull their weight.

The point is, you don’t have to come up with these answers all by yourself. We are in this together, so learn best practices from others who have walked the path before. Then you can walk the path of least resistance.



## JANET LEBLANC

*President, Janet LeBlanc + Associates Inc.*

One of the great joys of living in Canada is the abundance of beautiful downhill ski resorts. As a competent intermediate-level skier, my technique is solid



when I am skiing down the easiest ski runs.

When I challenge myself to a black diamond run, the steepest and most difficult ski trail, my technique goes out the window and I race down the hill praying that I make it to the bottom in one piece.

This analogy is akin to the many challenges faced by organizations in 2020. When COVID-19 became a global crisis, millions of people raced through changes and picked up speed without the benefit of a “trail map.” For many, the slope and length of the “trail” has been challenging. We cannot see the bottom yet.

Change is difficult, particularly during stressful times. My message to contact center leaders is simple: Be brilliant at the basics.

Customers will continue to want an effortless experience—one they can consistently rely on when questions arise or problems occur. Be sure to listen. What is most important to them today?

Employees will continue to need the positive reinforcement that comes from weekly coaching and regular, informal recognition activities. Consider offering refresher training to strengthen their foundational skills and professional development so they can learn new competencies, especially those related to adopting and adapting to new technology.

Everyone from the C-suite to the frontline needs constant reinforcement about the need for a greater degree of empathy during employee and client interactions. This is vital because zones of tolerance tend to narrow, and morale can decline significantly during prolonged, stressful periods of time.

As we continue down this new hill, true success will come to those who stick to basics that are relevant and effective. Our form and performance will continue to improve if we help each other stay positive, focused and agile.



## **TIM MONTGOMERY**

*Founder & Managing Partner, Alamo Cloud Solutions*

One of the best things we learned in 2020 is that call centers can move fast to adjust technology, processes and frontline management. We moved fast because we had to, and many of the things we did have been “admired” by many in the organization for a long time—we knew it should be done, but it was always caught up in the way we’ve always done things.

Prior to the pandemic, we would spend months in meetings trying to pick the one or two areas we were going to improve this year with the budget given. Then we would create project teams to research and evaluate the options and consider how to adapt the organization to support the change. We’d then get it on the IT “to-do” list, and everyone would again “admire” the project from a distance. A year later, we’d roll it out to a small portion of our customers, just to make sure that we were ready to support it. And, by the time the change was fully implemented, we are now only three to four years behind best-in-class call centers and where we know we need to be.

In 2021, call centers must avoid falling back into the traditional prolonged approach to implementing new technical solutions and processes, and instead move to a “fail fast and learn” model. In the “next normal” environment, we’ll still be answering questions like, “how quickly can we achieve a fully integrated and implemented cloud-based omnichannel strategy?” The answer should be

measured in weeks, not years. The last couple of years have taught us that we don’t need to waste time on proof of concepts to make sure the technology fits our old processes. We need to build new processes around the cool improvements new cloud technology provides.



## **KATHLEEN M. PETERSON**

*Chief Vision Officer, PowerHouse Consulting Inc.*

As we move closer to 2021, I’d like to share this piece of advice with contact center leaders... NEVER FORGET 2020! The lessons of 2020 are already abundant, but they are not complete. I believe that business leaders must be aware that there are more lessons to learn and they may be more complicated than those we’ve dealt with to date.

Human factors are emerging, especially as the initial embrace of work-from-home is chilling for many. “Zoom fatigue” is escalating. I recently read that the “humble phone call” is enjoying a resurgence in use. The evidence is mounting that we are longing for human connection and the energy that comes with it. Filling that human gap for the front line must be a leadership priority. If not, turnover will continue to disrupt the operation.

Never forget that 2020 will continue to cast its shadow as we welcome 2021. As an example, many consumers continue to struggle with financial issues and want assistance from their financial institutions. If you have called their numbers, you know the script, “Due to COVID-19, call volumes are higher and delays are longer, etc., etc.”

As a contact center leader, you can likely forecast what is happening on the other end of that announcement. The frontline workforce has no relief and is likely asked or required to skip breaks and lunches and to work overtime. This is accompanied by increasingly stressful interactions... a formula for a workforce that is burning out!

Based on the ongoing impact of 2020, my advice is to recognize burnout indicators and treat staff retention as a desired outcome. Retention is the outcome of providing a good place to work and meeting staff needs on multiple human levels. Leaders must use a keen eye to spot when disconnects are trending, enthusiasm is waning, productivity is going down, and absences, tardiness and errors are on the rise. Get in touch and stay in touch with your team to prevent 2020’s shadow from darkening your operation. Enlighten the enterprise as to the contact center’s true needs.



## **MICHELE ROWAN**

*President & CEO, Customer Contact Strategies*

There are a couple of silver linings from the pandemic that I believe many of us have witnessed in the business environment this year. We’ve seen and experienced speed (of decisions), pace (of implementations), enthusiasm, resiliency and humanness of leadership at all levels of organizations. Digital transformations have improved workflows and outputs, and in many cases, long-term customer experience. And many businesses have learned that they can be much more flexible (than they previously felt comfortable with) without things going sideways.

In tandem with some of these remarkable wins, it’s also become quite clear that our worlds won’t be returning to “normal” or exactly

“the way that they were” pre-pandemic. The way that work gets done (and who is doing it) is forever changed.

So my suggestion to business leaders going into 2021 is to take this time now to begin to carefully shape and articulate the messaging that employees can expect with this “new” reality. Why? Employees are weary, and they are searching for the sense of stability that’s been hidden by the pandemic. Now is right the time to start talking about how policies, guidelines, workflows, company positions, values, culture may be shifting longer term as a result of this experience. Add to that clear messaging that employees will be invited to the table to weigh in and to participate in these defining moments.

Some examples of shifts: Articulate the fact that your company will offer in-office and home-based schedules (for people that are interested) longer-term/post-vaccine. Perhaps your company recognizes most are not set up for offices at home, and that stipends or “flexible spending accounts” of \$300-\$400 per year will be made available to contribute to home-office setups. Announce the start of a “WFH Action Committee” with changing members to develop team-building and engagement activities for people that work remotely. Solicit input from employees regularly through semimonthly pulse checks.



## PAUL STOCKFORD

*Founder, President & Chief Analyst,  
Saddletree Research*

There seem to be three central themes emerging among contact center professionals as we enter 2021:

- Contingency Planning
- Employee Wellness/Engagement in the Work-From-Home (WFH) environment
- Automation

Contingency planning is the subject of my January 2021 “View from the Saddle” column (“Can You Say Con-tin-gen-cy?”), so I won’t go into a great deal of detail here, but as my colleague Jim Lavery at Desert Financial Credit Union so aptly put it, it’s time to start planning for that earthquake in Phoenix and the snowstorm in San Diego! The pandemic has forced many if not most contact center executives to reexamine their contingency plans in the face of an unexpected crisis.

With nearly 42% of contact centers planning to have all or most of their agents work from home after the pandemic, and another 29% of contact centers planning to have at least some of their agents working from home, or offering the option to agents to work from home, employee engagement takes on a new meaning. Besides a greater reliance on analytics for remote quality management and performance management, management practices will also have to evolve to reflect the challenges of this new reality.

Automation seems to be the first step toward artificial intelligence (AI) that the contact center executives I’ve spoken with are exploring. With both customer-facing and agent-facing benefits, and the use cases we’ve seen during the pandemic in which automation stepped in and “saved the day,” I expect to see demand for automation in the contact center industry spike during 2021. Automation is no longer the mysterious outlier that it once was. It is now one of the

most democratized solutions in the industry, accessible to contact centers of all sizes.



## JENNIFER THOMAS

*Director, Contact Center Operations,  
Penn Foster Education*

The ability to pivot continues. 2020 saw an unprecedented need to pivot multiple times, and contact centers certainly rose to the challenge. I believe 2021 will bring an entirely new set of challenges requiring leaders to continue to be fluid and change directions. There is potential to see complete opposite ends of the financial spectrum occurring at an even different pace and level than that of 2020. With CNBC reporting \$2 trillion in cash waiting to flood the market post-pandemic on one end of the spectrum, and unemployment rates and government assistance unstable on the other end, challenges will remain.

Take your start, stop, continue inventory. Many call centers implemented changes to their processes, policies and systems to adapt. Knowing that anything can happen in 2021, analyze what changes worked and will remain sustainable knowing the challenges ahead. If you were one of the centers that had to send your workforce remote, what did you learn from that experience that you can use in hiring initiatives for 2021, potentially including creating a remote-work playbook? If a policy was adapted to do the right thing for your customers, but you’ve found that it had a negative effect months later, should you stop it or change it?

Technology is the epicenter of success. This is not a new concept for call centers, but last year was certainly telling from a technology standpoint showing if you had any proverbial “cracks in your walls.” From hardware to software that supports your customers and staff, changes certainly occurred. Ask yourself if the changes your organization made are sustainable for 2021 knowing that anything can happen.

Best advice I can give for 2021 is to watch the “Friends” episode as a refresher and continue to Pivot. Pivot. Pivot!



## DAN WALLIS

*Vice President of Contact Center Shared Services,  
Visiting Nurse Service of New York*

Contact centers have long been an under-exploited hub of agility, ingenuity and innovation within many organizations. These attributes have come to the forefront during this pandemic as premise-based contact centers sent their agents home, self-service apps were created or improved, new staff were rapidly added and trained (usually remotely), and a new breed of AI/bots was deployed to help meet the needs of our customers without agent intervention.

In 2021, I expect that contact centers will build upon this momentum. With increasing understanding of customer experience, and the importance of contact centers in supporting our brands, I see a continued shift from the contact center as a cost center to recognition of its role as a key part of the value proposition of the organization and core contributor to that excellent customer experience. •

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