

SUPPORT TECHNOLOGY WITHOUT AN ANALYST IS LIKE A CAR WITHOUT A DRIVER

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The case for staff to use technology.

BY LORI BOCKLUND, STRATEGIC CONTACT



Though self-driving cars have been researched, developed and piloted, few of us stand ready to buy one. We're just not convinced that technology can run all by itself. And even if we were to be persuaded otherwise, we wouldn't expect it to do all that we need it to do. We might need to get in the driver's seat on occasion to get where we want to go!

You can look at the wealth of powerful technology for the contact center in a similar way. As a case in point, analytics and workforce management tools leveraging artificial intelligence are getting smarter every day. Yet, I don't know of any solutions that deliver real value without the benefit of skilled, trained analysts. The human touch provides the means to interpret findings and

discern what comes next. Moreover, trained analysts can take full advantage of *all* the fancy features, not just the basic gears.

No matter how impressed you might be with the wonders of contact center technology, I want to make the case for hiring and training staff to *use* it well.

If Wishes Were Horses...

Let's take a spin at the other end of the transportation evolutionary spectrum. A Scottish proverb and nursery rhyme from the early 1600s tells us: "If wishes were horses, beggars would ride." It cautions us against succumbing to the fantasy that wishful thinking can create reality. Contact center managers often fall into this trap by believing that technology alone will bring about

transformation. They fail to acknowledge that it's the support resources whose alchemy turn each technology's potential into a powerful, effective resource.

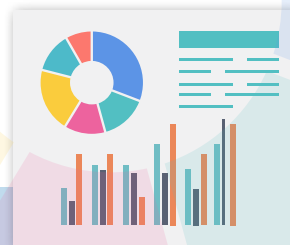
Our assessment and planning projects often carry the recommendation to build out the team of support resources—e.g., business analysts to address forecasting and scheduling, perform analysis that drives insights and defines actions, and develop and maintain knowledge and process automation. Committed resources for quality assurance and training can be a common gap that grows more evident as the power of tools in these areas increase.

In fairness, some passionate leaders begin their technology journeys with great intentions, investing in training for themselves and/or their staff and prioritizing usage. But even with the best intentions, the "tactical swamps the strategic." When juggling a gaggle of responsibilities, they run short of time to do the analysis, build the new workflow, author the knowledge article, or keep pace with training. Inevitably, the tool sits, gathering dust, with nobody to take the wheel.

Here's the reality: The support analyst function is not an "in your spare time" role. It's a mission-critical component of any technology solution. It should not be backburnered or left to the vagaries of chance when the person who manages it moves on. It's time to make concrete, sustainable plans to fund the resources that go with technology.

“But Lori, Our Center... (Is Small, Has a Hiring Freeze, Etc.)”

There are so many reasons to think you can't solve this problem in your center—but you can! Remember that the biggest cost of a center is labor—so think about how these roles can help you save on all that (increasingly expensive and hard to find) frontline labor—e.g., deflect contacts, lower handle times. And, if your center can drive or protect revenue, the business case has another compelling angle because that money can add up fast! Also, keep in mind there are other alternatives to hiring full-time staff. Look at professional services to go with the technology from your vendors or third parties.



AI Plays a Role, But It Still Needs a Driver!

As I've written in other articles, artificial intelligence (AI) is playing a big and growing role in contact center technology—e.g., self-service, routing, analytics, forecasting and scheduling, knowledge management, process automation, gamification, etc. Popular applications include:

- Self-help transition to guided agent assist
- WFM—optimizing schedules, real-time adjustments
- Analytics/KM—find and promote content tied to interaction

However, just because something has an AI element doesn't mean that the application can run on autopilot. It still needs resources! In fact, the resources might need to be a bit more experienced, specialized and/or trained, thereby strengthening the case that fitting it into someone's spare time is not going to work.

As you talk with vendors about the role AI plays, make sure you dive into how to optimize and leverage the technology over time. Ask them what resources you need to really drive value and what combination of resources—theirs and yours—can deliver the value you seek.

Which of These Scenarios Describes Your Situation?

Companies often exhibit a failure of imagination when implementing new technology. Leadership can readily imagine the power of the new tools but can't extend that vision to the people who'll use and derive value from the tools on a daily basis. They think you just get started and it will all work out (aka “good people find a way”). It places contact center management in the position of scrambling for resources using one of the following scenarios.

In larger organizations, a centralized pool of **Corporate Resources** often assumes responsibility for support in the form of Business Intelligence or Learning and Development (L&D) groups. These folks tend to be generalists who support a broad range of business units and applications. While having some resource beats no resources, the diffuse attention and lack of contact center expertise may compromise the quality, quantity and consistency of support the center receives.

In a **Line of Business Resource** model, support staff tends to be allocated in direct proportion to each unit's contribution to the bottom line. Small centers may find themselves in the precarious position of scraping for attention or, sadly, giving up and going unnoticed, thereby underutilizing the tools. Astute managers look for opportunities to share resources with comparably sized business units or fund a piece of an analyst situated in a larger group.

The all-too-common **No Resource** scenario carries an expectation that technology use and optimization is something that can be folded seamlessly into an existing position.

It's a common occurrence in smaller centers and a great challenge to overcome. If supervisors (or managers) prioritize these responsibilities, it comes at the cost of their main roles in coaching and development, which in turn impacts employee engagement and attrition. If they give technology short-shrift, then they short-change the value they get from these tools.

In any of these scenarios, loss of trained resources imperils the ongoing benefits that technology can deliver. Companies are often reticent to backfill these jobs and may delegate the responsibility to someone else (who is probably full up with other tasks!) and/or be slow in training a replacement.

Beyond the obvious time-management issues with grafting analyst responsibilities onto frontline leadership jobs, technology users must have an aptitude for, and interest in, the tools to which they are assigned. Someone with strengths as a supervisor (e.g., people-oriented, love to develop staff) may not have the same level of expertise in

doing analysis (do you know anyone who says, “I don't do numbers”?!).

Contact center leaders routinely wear many hats, especially in small centers. They prioritize and perform triage constantly. They can't do it all. It's time to dispense with the magical thinking that technology takes care of itself, or that good people will simply find a way.

There Is Good News!

Even though I am beating this drum loudly—with frustration built over 25-plus years of seeing hundreds of companies fall short in this area—I am not all doom and gloom. There is good news! Let me highlight my favorites.

Through a variety of innovations, technology is getting easier to manage. Improvements in user interfaces (UIs) enable frontline staff to offload some of the administrative functions, leaving analysts free to focus on more sophisticated inquiries and deeper dives. These UIs are more intuitive

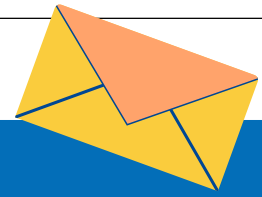


TABLE 1: Each Technology Needs a User

CC TECHNOLOGY	WHO IS THE “USER”?	NOTES ABOUT THIS USER
Main Contact Center Platform—Routing, Omnichannel Reporting and Analytics (R&A) (including Scorecards, Dashboards)	Business Analyst	<ul style="list-style-type: none"> As more centers move to the cloud, this role is increasingly handled in the center (not IT/Telecom). If the reporting and analytics role comes from a corporate Business Intelligence group, make sure someone is focused on (and ideally, immersed in) the center.
Workforce Management (WFM)	Workforce Analyst	<ul style="list-style-type: none"> Forecasting, scheduling and optimization pays big returns for efficiency and the customer experience!
Quality Monitoring/Voice of the Customer/Customer Satisfaction	Quality Analyst	<ul style="list-style-type: none"> Perhaps the most often prioritized role, yet QA still gets pushed off too often; make sure this role is sized to match the center and does not get diverted.
Speech/Text Analytics	Business Analyst	<ul style="list-style-type: none"> If you can get a contact center-focused analytics tool, an Analyst to use it is a “must have.” This person really needs the right aptitude and training. This role may be combined with the Quality role and/or R&A.
Knowledge Management (KM)	Knowledge Manager	<ul style="list-style-type: none"> Perhaps the most neglected role, and it’s easy to see the result—KM that isn’t up to date, trusted, easy to use... Newer KM solutions provide powerful tools to manage and automate, but still need a focused User to maintain, update, add and optimize knowledge.
Customer Relationship Management (CRM)	Business Analyst	<ul style="list-style-type: none"> CRM is often an enterprise solution, but the best use I see of it in contact centers is when a well-trained person in the center can apply its capabilities to the business needs that arise.
Coaching eLearning Gamification	Supervisors, Managers, Trainers, Analysts	<ul style="list-style-type: none"> These tools have a combination of users and that’s OK—just make sure the responsibilities are clear and ongoing. eLearning in the hands of a great training developer is a powerful combo; bonus if you have a vendor that includes support on how to use it well.
Hiring/Profiles	HR, Supervisors, Managers	<ul style="list-style-type: none"> HR may have tools and resources but having CC-specific focus helps tremendously—especially with today’s competitive hiring scene and the challenges of finding best-fit candidates.
Self-service—IVR, Bots, Online/Web, Mobile	Analyst, Developer	<ul style="list-style-type: none"> Each self-service tool may have different owners, but regardless, you want them to work together for a consistent customer experience and collaborate with the contact center to optimize self-service and the transition to assisted service.
All things Artificial Intelligence (AI)—Bots, Process Automation, etc.	Data Scientist, Analyst, Developer	<ul style="list-style-type: none"> A catch-all but a reminder that, when you buy powerful AI tools, you also need to plan for users—whether in-house, through the vendor or a third party, or some combination.



and require less training for technically astute users. Out-of-the-Box (OOTB) functionality helps companies go farther, faster—whether pre-built starters, “wizards” and/or readily configurable templates.

New pricing models support giving technology a test run to prove in the value and justify the *full* expense of purchasing it long-term. This development turns the model of buy-it-and-expect-I-can-find-time on its head. You get to use it before you buy it and figure out what you’ll need to make it work. It also allows for time to consider the broader business case that funds the technology and associated human resources—e.g., staff reduction, less staff increase as volume grows, incremental revenue (direct or indirect—e.g., loyalty). If the economics prove attractive, management will be compelled to either fund a resource internally, get a third party to help, or get the vendor to play a role through value-added services.

Of course, each new technology does not have to have its own dedicated resource.

When you figure out which roles you need based on the technology you have or are pursuing, you could create a combined analytical role or tap others for part of the function. Some examples:

- Business Analyst that does WFM activities and reporting and analytics role.
- QM/VoC that can take on a higher ratio of agents when Supervisors do part of the reviews and deliver the coaching.
- A Knowledge Manager who is also responsible for process optimization.

While the opportunities are widespread across a variety of contact center technology, you may want to differentiate WFO/WEM opportunity versus others and prioritize based on the technology and resources you have, and those you wish for. An initial focus on WFO/WEM may deliver the greatest value, but don’t neglect other areas—e.g., KM, CRM, self-service. **(SEE THE TABLE.)**

Off to the Races

Whether on a horse or in a car, you need

an engaged driver to make the “vehicle” get you where you want to go. As the contact center technology industry advances with increasingly powerful and diverse tools to help your center meet its goals, keep in mind it’s not just about the technology—you *need* people. And, to paraphrase Barbara Streisand, people who *get* people are the luckiest people in the world! ☺



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