Optimize the Agent Desktop

Reduce desktop complexity to make a quantum leap in efficiency and effectiveness.

By Brian Hinton, Strategic Contact

Contact Center pipeline | Pipeline Articles
www.contactcenterpipeline.com

Brian Hinton
Strategic Contact

Desktop complexity is a primary driver of inefficiency in contact centers of all sizes. Product silos with disconnected development and upgrade strategies, disparate applications for different customer segments, multiple enterprise customer information systems, and multiple information sources force agents to use an array of non-integrated applications for contact handling. To top it off, the contact center is often treated as the poor stepchild, getting "hand-me-down" applications that were built or bought for other business areas and got shoehorned into real-time interaction flows.

Desktop complexity isn't merely unsightly or an inconvenience for your agents. It's a serious impediment to delivering world-class service. Tell-tale signs of trouble include:

- Needless workgroup segmentation with low occupancy
- Long average handle times
- Long training times
- High percentage of escalations or errors
- Inconsistent information and resolution

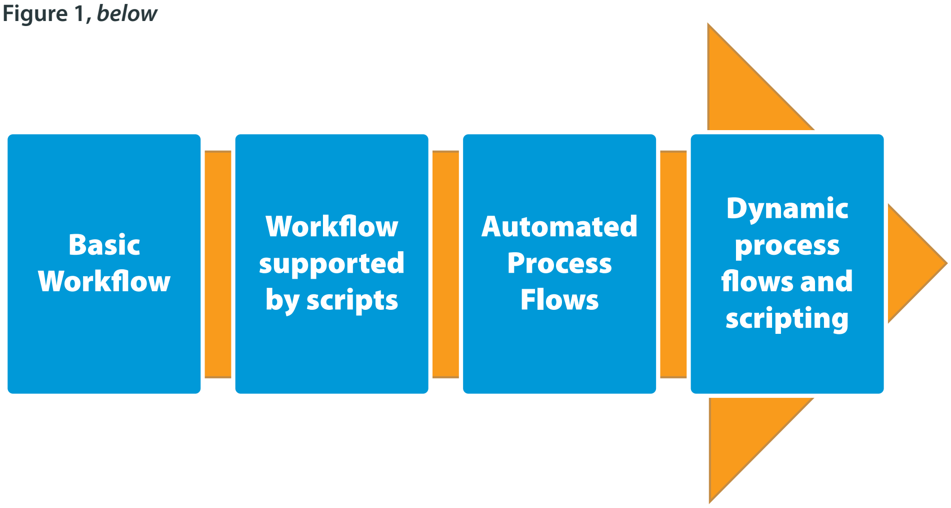
There aren't many "silver bullets" for resolving contact center challenges, but fixing the agent desktop is about as close as you can get. Reducing desktop complexity through analytics, automation, integration, dynamic process flows, collaboration and access to information offers a huge "bang for your buck" in efficiency and effectiveness.

Gain Powerful Insights with Analytics

Contact center management, support staff and the front line are all too familiar with the pain and suffering that complex desktops create. One can't help but notice that agents have to jump in and out of multiple applications on every call, or that a hefty number of calls get escalated because agents can't figure out how to handle them. But these obvious problems can be symptoms of deeper issues:

- Core applications that are ill-suited to the center's primary tasks
- Incomplete applications development that forces workarounds
- Chronically unresolved performance issues (e.g., latency) that cause agents to resort to manual processes during and after the call
- Products, services or functions added to the center's charter without due consideration for their applications support requirements
- Lack of well-designed knowledge aids to help agents address unfamiliar tasks or atypical inquiries

Process flow automation options ,
Figure 1, ***below***



It's clearly difficult to muster the political will to address the agent desktop. And in fairness, it's such a complex and (perhaps) expensive undertaking that one may not know where to begin. Analytics tools can help centers get "unstuck" on both counts. They provide a deep understanding of what is *really* happening at the desktop to quantify impact and pinpoint areas where incremental investment will yield the highest return.

Desktop analytics tools log activity during customer interactions. They determine the number of times each application is accessed and by whom. They record how long agents use each application and the major functions performed while there. And they take note of how long it takes for the application to respond to agent requests (i.e., latency). With thousands of logged events, a properly configured tracking and reporting engine is crucial.

A skilled analytics specialist works with the center's management to configure the desktop tracking and reports during the implementation phase. Key factors for design include:

- Identifying primary applications used for contact handling to target improvement initiatives
- Tracking multiple log ins and their impact on call-handling times
- Specifying process flows such that anomalies in agent behavior will surface (e.g., wrong screens, flows, actions)
- Flagging use of information tools (and taking note of when they are absent)
- Identifying cumbersome manual processes

A number of vendors provide desktop analytics capability. Knoa delivers this capability under the auspices of "User Experience Management" and partners with major desktop applications providers (e.g., SAP, Oracle) in delivery. Consolidated desktop application (CDA) vendors like Jacada, OpenSpan, and Cicero vary in their focus on analytics and associated reporting capabilities. Performance optimization vendors (e.g., NICE, Verint) also provide desktop analytics tools. And for those that want to dip their toes or don't have the resources to add, maintain and use more technology, an excellent option is to use a managed service. Companies like Customer Relationship Metrics offer desktop analytics as a service, helping you quickly gather the data needed and providing analysis and actionable recommendations.

Automate and Integrate

Once the problems are well understood, the primary source of improvements are automating tasks and integrating applications. The usual suspects include:

- Duplicate data entry requiring copy/paste
- Data from multiple applications used to resolve a single issue
- Varied information sources with limited or cumbersome search capability

A thorough review of your contact resolution processes will reveal where automation and integration will be valuable. In most cases, it's easy to see where the agents are providing the integration between various systems through their manual activities, and the costs and risks those activities introduce by slowing them down and increasing the potential for errors or missteps.

There are several tools (mostly provided by the CDA vendors previously mentioned) available to assist with desktop process automation and integration. Solutions vary on the level of "intrusiveness" into the desktop application coding and therefore can require different levels of IT involvement to implement, configure and support. Solutions can also vary in your ability to continue with your current agent interface rather than integrating applications with a vendor provided interface that may be a simplified "agent portal." It is important to develop complete requirements and understand how each vendor will meet your specific needs, both from a user perspective and from an integration perspective. Involve both IT and the contact center in the requirements and evaluation process.

Use Process Flows to Drive Efficiency

The budget dollars may not be forthcoming to automate and integrate. At a minimum, there are time lags between project approval, implementation and realized benefits. The contact center can still streamline training, reduce handle time and improve service by documenting the contact-handling processes and providing tools that lead agents through complex processes to contact resolution. Figure 1 shows how process flow tools offer increasing levels of "control" to react to your center's level of complexity.

At the most basic level, you can automate process steps with a workflow tool used to automate moving a case, trouble ticket or document to the next step in the flow. We see workflow tools most effectively applied to escalate contact resolution to a higher tier within a contact center or to subject-matter experts (SMEs) outside of the contact center. Using workflow tools eliminates manual follow up and "dropping the ball" by providing reports and alerts on open items. In situations where agents must walk callers through multiple complex steps using a variety of applications, adding scripts can help lead the agents through efficient and effective contact handling with more consistent results.

Automating process flows goes beyond workflow by detailing each step with links to any required information, applications or websites required to complete the step. Automating process flows can also guide the user to required fields at the appropriate point in the call to enter caller-provided data. Consider process flow automation for situations where procedures are long and prescriptive, and involve accessing multiple applications, sources of information and websites. Automating the process takes away the requirement for the agent to remember all the details, improving the customer experience, ensuring each step is dutifully executed and reducing handle time.

For the most complex processes where scripting helps the agents resolve the contacts, dynamic or “smart” scripting is a useful addition to automated process flows. In dynamic scripting, displayed scripts vary based on customer interactions and outcomes.

There are several options for sourcing tools to automate workflows and processes. Many current CRM applications have a module that automates workflow and may even provide some process automation. Document Management or Content Management tools also generally have a workflow component. Scripting tools associated with your Outbound Dialer solution can often be used effectively for inbound contacts, as well. For a full-featured approach there are scripting technology tools that are usually very advanced in providing the full range of functionality described. These tools are extremely effective as they can be used differently based on what each contact type, process or agent requires.

Leverage Information and Collaboration Tools

Agents need a great deal of information to resolve complex customer issues. They can acquire that information through training, using knowledge aids or through collaboration with subject-matter experts (SMEs). The latter two better serve a complex, dynamic environment and are elements that can be part of the improved agent desktop, shortening handle times, improving accuracy and consistency, and increasing first-contact resolution.

Knowledge aids provide a centralized, searchable, well-ordered repository of information spanning the full range of inquiries that agents might have. Commonly used tools include:

- **SharePoint** (or other digital library)—used effectively when the requisite content is relatively contained and can be managed and controlled within the contact center
- **CRM**—used when the knowledge components integrate information to resolve contacts or link with the appropriate external knowledge sources
- **Wikis**—used when the community has the knowledge, experience, skill, interest and time to generate and maintain its own repository without compromising customer care or running afoul of legal or regulatory concerns
- **Knowledge Management Systems (KMS)**—used for complex information environments (e.g., large amounts of data that would be impractical to duplicate, multiple repositories of information) in which the interest in access may cross departmental boundaries within the organization and/or the control of information needs to be more carefully managed

Regardless of which option the center might choose, a knowledge owner/manager must assume responsibility for content management (and community management, in the case of a wiki) and all of the associated update and maintenance processes. Should the content go out of date, deliver inaccurate results or become too unwieldy for effective use, it ceases to be used and deliver value. The knowledge owner/manager is a critical success factor.

Collaboration tools alert reps to the availability of internal contact center "experts" and enterprise SMEs, and provide communications resources to tap their expertise. Enterprise collaboration tools from Microsoft or other "unified communications" vendors provide internal collaboration capabilities through presence, instant messaging (IM), and even document sharing and video.

Start Now

For those who are serious about making a quantum leap in operational performance, a good starting point is an assessment of the current state of the agent desktop. Document the current processes through agent observation and focus groups to determine where complexity is driving cumbersome processes and inefficiency. Where possible, leverage analytics for a "deeper dive" to help clarify critical issues and priorities and to provide solid data to justify the changes you need to make.

The course of action will depend on the current technology, the magnitude of the challenges, and the available budget and resources. A first step could be consolidating information in a digital library. Or, start with an assessment of unified agent desktop requirements and a search for technology that supports process flows, scripting, data and applications integration, and KM and collaboration tools.

There is no reason to tolerate a poorly conceived agent desktop when the impact to the bottom line and the quality of customer care is obvious and measurable. If the agent desktop is "broke," it's time to fix it.

Brian Hinton is the Principal Consultant for Strategic Contact.

✉ brian@strategiccontact.com
☎ (706) 310-0544

Desktop Optimization Vendor Options

Consider the following vendor categories as you improve your knowledge of desktop optimization options. The overlap in sources for the different components that can assist in optimization requires a thorough understanding of your situation and detailed documentation of requirements, followed by vendor due diligence.

- **Service vendors—**managed services for desktop analytics may be the best way to get started with understanding the desktop improvement opportunity without buying and implementing technology
- **Current ACD Vendor—**basic workflow or scripting as part of suite components, presence/IM, basic knowledge management tools (e.g., FAQs)
- **Performance tool vendors—**desktop analytics, standalone or as part of a suite
- **CRM—**workflow, knowledge management, scripting, desktop analytics
- **Standalone vendors provide:**
  - Desktop analytics
  - Consolidated Desktop Applications/Unified Agent Desktop/Process Automation
  - Workflow and/or Scripting
  - Knowledge Management
  - Wikis
  - Presence/IM/Collaboration

Pipeline Publishing Group, Inc. PO Box 3467, Annapolis, MD 21403
(443) 909-6951 | info@contactcenterpipeline.com