MAKE TECHNOLOGY YOUR AGENTS' BEST FRIEND

The right tools simplify the complex. Successful solutions are process-driven with agents as the supporting element.

By Dee Kohler, Strategic Contact

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WHERE HAVE THE SIMPLER DAYS GONE? This is a common plea in the contact center. Self-service, an explosion of contact channels, varied customer needs, and a revolving door of product and service offerings have made work on the front lines increasingly complex. Agents want and need help!

Fortunately, there is a wealth of technology that can help agents meet customer needs throughout their transaction cycles. With thoughtful design and appropriate processes, agents won't need to spend half of their careers in training to use technology. But it requires foresight, planning and well-managed execution to develop solutions that can truly be "the agent's best friend."

Simple Transactions Move to Self-Service

The myth: Self-service was supposed to be the savior of the customer service center. As customers migrated to these lower-cost channels, costs would decrease along with agent dependence. That myth has been BUSTED. While self-service across a variety of channels has captured a sizeable share of activity (see Figure 1 on page 3, courtesy of Frost & Sullivan), overall contact volumes continue to rise. Agents are left responding to more complex questions as well as connecting the dots of interactions started via web, IVR or mobile self service applications. Simple and routine has become the exception, not the rule, for agent-handled contacts.

Customer Expectations and Needs Add to the Complexity

Customers have access to more information about a company's (increasingly complex) products and services through more channels than ever before. They expect service representatives to know *at least as much* as they do. If they don't get what they need, they're not shy about sharing their frustrations with others. Customers are in the driver's seat when it comes to defining where, when and how they'll interact with organizations. But agents can't be just along for the ride; they need to be prepared to help customers navigate and point out all the points of interest (Figure 2).

Both customers and agents are frustrated!
FIGURE 2, ABOVE

In a recent survey by Fonolo on customer service trends and expectations, 66% of email, web and IVR users said valuing their time was the most important thing a company can do for good online customer service. Forty-two percent find repeating information to be their biggest frustration with contact centers, followed by waiting on hold at 17%.

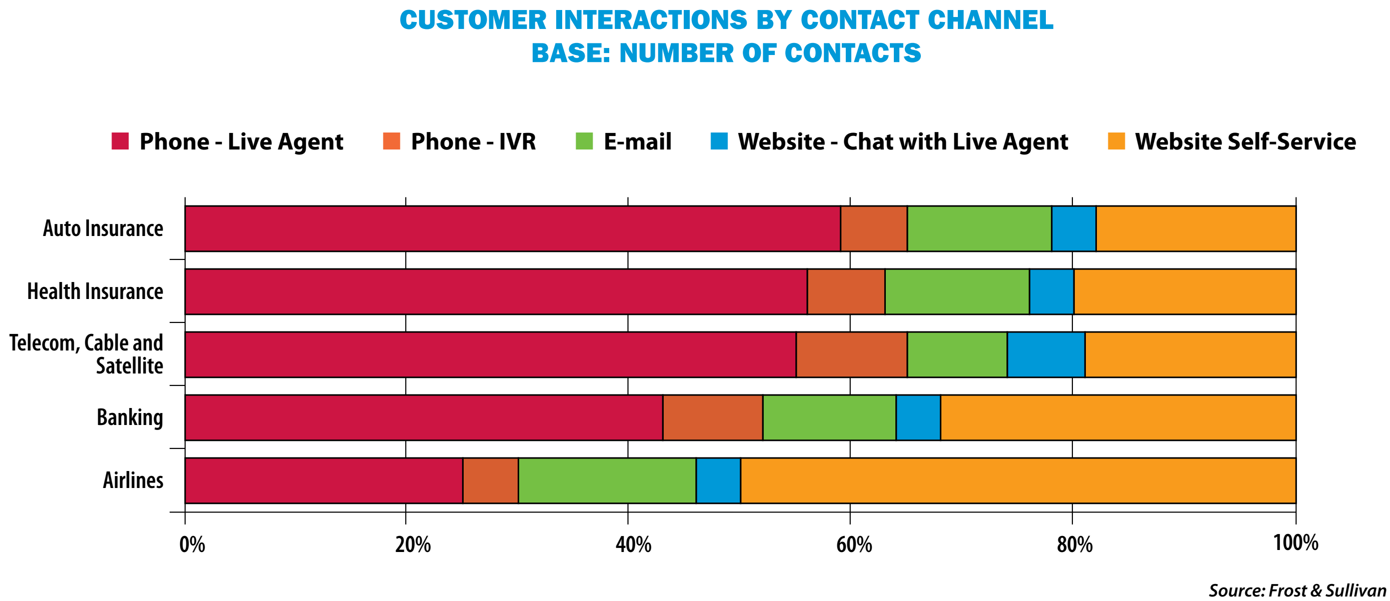
What do customers expect in service channels and performance? It's pretty simple, really:

- Support the channel(s) I choose
- Provide consistent answers across channels
- Give me quick and accurate responses

Agents aren't super-human, and budgets aren't unlimited. You cannot meet all these expectations just by adding staff and increasing training. Rather, the technology supporting your organization's comprehensive customer experience strategy is the "weapon of choice" to win this complex battle.

Technology Can Solve Problems

Consider poor Jane, one of the 42% frustrated by repeating information and certainly one who wants a company to value her time. Jane logs in to self-serve with her bank, starts to set up some online payments, and BAM! The interaction stops. The system is not letting her add a payment recipient. She sees the option to chat with an agent and gives that a try, selecting the reason, "Assistance with online banking." Maria is ready to help in less than 10 seconds, and Jane is hopeful that she will soon resolve her problem. But this interaction quickly deteriorates.



Frost & Sullivan study shows wide-ranging channel use, but continued high reliance on agents FIGURE 1, ABOVE

Maria asks Jane to please provide her name. Jane provides it but isn't sure why since she is logged in. Then Maria asks her how she can help. Jane is more frustrated; the "customer experience" is not going so well, and the bank's status in her eyes is sinking. Jane types that she needs assistance with adding a payment recipient. After five minutes of chatting with Maria (including some expressions of frustration), she finally receives the proper instructions to complete her task.

In this scenario, integration between the web and the chat inquiry and quick access to some useful, up-to-date information would have led to a seamless conversation, rapid response and lower level of effort for both Jane and Maria. Without these capabilities, both the customer and the agent feel less than satisfied with the interaction. And this scenario is just one of many that play out every day across millions of contacts. Table 1, on page 5, lists common issues that agents experience today and provides corresponding technology solutions to alleviate their distress.

While technology provides a means to meet customer expectations, it's also critical for managing the bottom line. A weak technology infrastructure impacts agent productivity. The more impediments to efficient service, the bigger the dip in productivity. And when productivity suffers, agent morale follows suit... and with it, performance suffers further. Before the downward spiral gets out of control, identify your biggest challenges and develop a plan for how technology can enable corrective action.

In this case, you have a ready and willing group of individuals who are eager to help you with this effort—the agents. Those who handle contacts all day have wonderful insights to share that can help you quickly pinpoint the changes you need to make. The first step in ensuring that agents will embrace the changes you pursue is engaging them in being part of the solution. Use these three simple steps that are easy to remember (**POP**):

1. Discover the **Problem(s)** by assessing what the agents are experiencing in the contact center, the impacts (on them, the customer, and the bottom line), and what needs to improve. Observations and focus groups are two good tools to use in this step.

Make things better for the agents and customers benefit, too! FIGURE 3, ABOVE

2. Identify the **Options** for resolving the problem. Do we have the technology and we just aren't using it? Do we need to upgrade or add a capability? Or do we need to close a gap with new technology? Look for insights and experience across the organization.

3. Develop and execute the **Plan** to solve the defined problem with the appropriate option. This step is where the IT and contact center leaders take charge and start to move from insights and inputs to action.

It's not hard to envision the improvement in Jane's interaction if Maria were armed with the types of tools outlined in Table 1. Now when Jane has to transition to agent-assisted service, Maria can immediately assist by saying, "Jane, I see that you are trying to set up a payment recipient. Can I help you with that?" Maria has a knowledge article with suggested resolutions at her fingertips. That single experience would be better for both, and the goodwill it creates can impact the relationship Jane has with the company, as well as what she shares with others (Figure 3).

Of course another key to agent success is having the appropriate supervisory management and support. The sidebar on page 6 addresses the role performance management tools play in helping supervisors succeed in effectively managing and supporting agents. Technology can be their best friend, too.

Not Just Change… Intelligent Change

A mentor of mine once shared: "Don't do something for something's sake." In this case: "Don't buy technology for technology's sake" and "Don't change for change's sake." Successful solutions are process-driven with technology and people as the supporting elements. Each tool demands careful planning, change management, and process review as building blocks for successful design. And implementation requires collaboration between contact center and IT leadership to effectively leverage the appropriate range of features and functions and ensure integration across many (existing and new) tools and channels.

So as you pursue technology to make agents' and supervisors' (and customers') lives better, give careful consideration to the organizational and process changes that must accompany the technology implementation. While these changes can be really exciting, we think technology is actually only about 20% of the recipe for success. The other 80%? People and processes, supported by change management to reinforce and sustain change in using technology effectively. Research by Prosci shows that projects with effective change management have three to six times greater likelihood of success, measured by on time, on budget, delivering the financial benefits expected (source: Prosci, www.change-management.com). So as you pursue change, remember it's not measured by technology cutover, but by impactful results.

Best Friends Make Things Simpler

Technology can assist agents in being successful in an increasingly complex world. Those who make significant investments in the customer experience through alternative media, self-service web portals, IVR and other media owe a proportional investment in agent tools to help them address the customer's need, whether simple or complex, the rule or the exception. By involving agents in the planning, design, testing and production, and ensuring careful implementation that leverages change management, those tools can truly become the agent's best friend.

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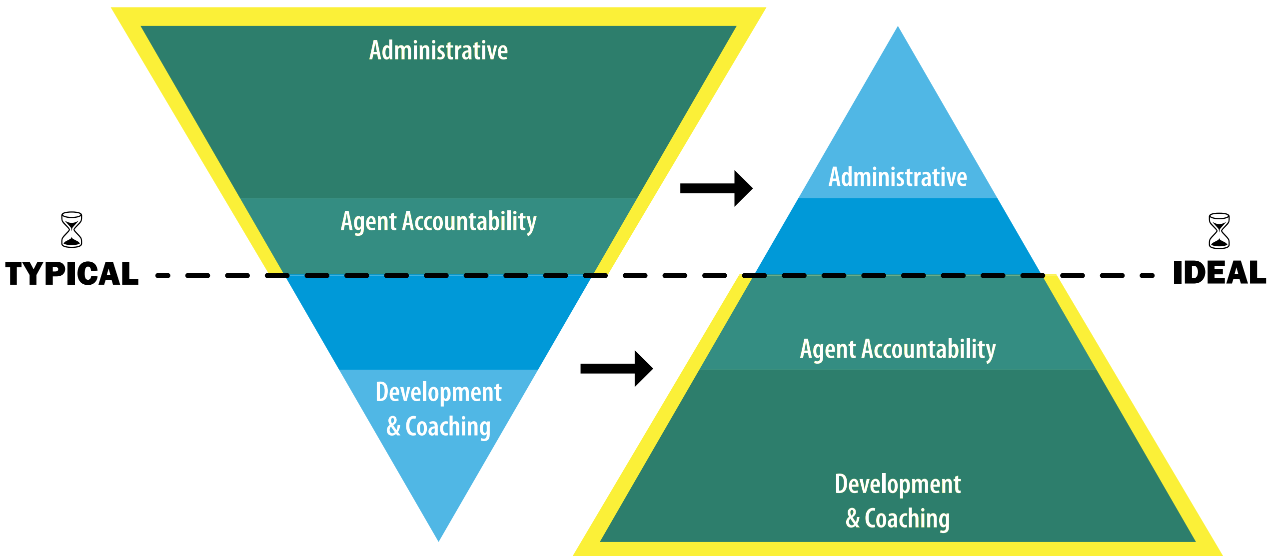
Technology makes agents’ lives simpler
TABLE 1, BELOW

AGENT EXPERIENCE TODAY	TECHNOLOGY SOLUTION
Many disparate systems that are not integrated	Unified agent desktop with integrated applications and automated processes
Time-consuming customer lookups and verification	Identification and verification on front end (via IVR, mobile, web) with accompanying screen pop (for example, into CRM) to display profiles, history, media activity
Multitasking and responding to multiple media at the same time (using separate systems for phone, email, chat)	Common or integrated multichannel routing based on skills and business rules
Create and type responses for email and chat, or individual libraries of response templates	Libraries of response templates centrally managed and accessed in email and chat tools
No visibility into interactions on other channels	CRM that captures and displays all self-service and assisted-service interactions
Lack of integration between channels to transition customers smoothly from one to another	Computer Telephony Integration, CRM, and common routing and reporting across media
Inconsistent responses to customer queries	Structured Knowledge Management systems and/or wikis that are leveraged across channels
Inability to transfer data across tiers or groups	CTI as well as presence and instant messaging
Complex back-office documentation	Templates and/or Smart-fill notes screens
Difficult and uncommon questions	Access to SMEs via presence and IM, and/or help desk queue
Continual training for process, product, media or system changes causes staffing inefficiency	Simplified desktop, workflow tools, LMS and web-based learning

DON'T FORGET TOOLS FOR THE FRONTLINE SUPERVISOR AND CONTACT CENTER SUPPORT

Ideally, frontline supervisors should spend at least half of their time developing and coaching frontline staff. Unfortunately, many spend more of their time dealing with agent accountability and administrative tasks. Figure 4 shows how the pyramid is typically flipped from where we want it to be.

Performance tools can flip supervisor time FIGURE 4, BELOW



Performance management solutions can help solve the frontline supervisor's time-management problem. Tools that can become their "best friend" include scorecards, dashboards and alerts, quality monitoring systems (including VoC with agent specific feedback from customers), workforce management, and analytics, as well as coaching tools with incentive, compensation and recognition features. Pursue a complementary suite of supervisor (and support staff) tools to go with the agent tools, with the same thoughtful approach ("POP" that includes change management in planning and implementation). Table 2 can help get you started.

Technology makes supervisors' lives simpler TABLE 2, BELOW

SUPERVISOR/SUPPORT STAFF EXPERIENCE TODAY	TECHNOLOGY SOLUTION
Dump report data into Excel and manipulate it to come up with the needed reports	Core ACD reporting on contact handling with flexibility to use standard reports as well as configure to meet needs
Limited real-time views and manual creation of historical summaries	Performance scorecards, dashboards, and alerts that gather data from the right systems, present color-coded visuals, and readily show trends
Little insight into what data in reports is telling them	Analytics tools that reveal data relationships to facilitate root cause analysis and potential improvements
Quality scoring for voice calls, often through real-time observations (and often compromised during peak times)	Quality Monitoring (QM), with screen capture and multimedia capabilities, enabling QA any time of day, any season
No customer perspective on service or only infrequent customer comment cards that reflect overall view of company (e.g., with Net Promoter Score)	Interaction- and agent-specific Voice of the Customer (VoC) feedback through scoring and comments
Excel schedules, perhaps using Erlang models to determine staff levels needed for calls	Workforce management that provides forecasting, scheduling and reporting across media
Limited coaching with minimal structure and no accountability	Coaching tools that help define coaching session topics tied to performance results, define actions and targets for improvement, and track and report coaching session outcomes (ideally tied to QM, VoC, and other performance scores in scorecard)
Often using memos and email or intranet bulletins to update and educate agents. Some have Corporate/HR Learning Management System	LMS/eLearning targeted at contact center needs and integrated with other performance tools, identifying and delivering specific eLearning modules at appropriate times and tracking progress

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