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Tech Line

It's Time to Put the Spotlight on Desktop Optimization

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Few projects have the potential to improve agent efficiency and service delivery as desktop optimization. *An eight-step agent desktop makeover.*

Most contact center agent desktops are a messy, complicated, confusing morass. Agents find ways to make them work… with a little help from empathetic neighbors with whom they share trade secrets and vent frustration. Agent heroics may lull management into a false sense that the desktop is manageable. IT won't come to the rescue given the myriad of other projects on their "to do" list. And, of course, project funding is exceptionally tight. Yet the fact remains: transforming a complex, cumbersome, multi-application agent desktop can drive contact-handling efficiency and optimize service.

Does Your Agent Desktop Need a Makeover?

Blessed with resourceful agents, you may be unaware of the problems they face—and tackle—every day. Most agent desktops have more windows open than the Biltmore Estate on a balmy spring day. Each window accesses an application to serve customer needs and enable the agent to fulfill their responsibilities (see Figure 1, on page 4). Agents become process engines and integration points between these mission-critical elements. They also use "sneaker net" to tap teammates for knowledge and access books, manuals and "cheat sheets," which may be dubious in reliability. It's not a pretty picture.

If you aren't on intimate terms with the agent desktop and its challenges, it's time to put call-handling observations and agent focus groups on your schedule. You'll witness first hand some common "aches and pains":

- Most of the applications that agents use are not tailored to contact center processes; they are "hand-me-downs" from other areas of the business. *As a result…*
- Agents bounce in and out of several applications to locate information, process transactions and/or launch workflows. *To access this bevy of applications…*
- Agents navigate multiple login screens and may enter the same login sequence repeatedly where restrictive access control policies are in place. *Once they gain entrance…*
- The graphical user interfaces (GUIs) for these applications have distinct styles and structures

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that agents must keep straight as they float among them. *If there are questions on system use or problems with its functioning…*

- Agents must navigate the support structure (formal and informal) to identify the various application "owners" from whom clarity and/or service restoration are possible.

Should you choose to get on the desktop optimization bandwagon, you'll need a compelling business case to get your stakeholders to come along. The big "bang for your buck" will be labor savings, which you can measure across three categories:

- **Reduced handle time.** An optimized desktop provides ready access to customer information across multiple systems without the need to jump back and forth between systems and/or cut-and-paste information across applications. It also enables the contact processes to flow more naturally and not be driven by system hurdles.

- **Call avoidance through enhanced FCR.** An optimized desktop reduces rework and errors, provides more efficient access to information and equips agents to efficiently expand the scope of their interactions with customers, resulting in improved first-contact resolution.

- **More rapid agent proficiency.** An optimized desktop shortens training time up front and the time to full proficiency on the front lines.

Finding Proof in Data through Desktop Analytics

Historically, centers used time and motion studies to quantify these savings. You might save yourself some effort and get additional valuable insights by using a desktop analytics application. These applications monitor and track desktop activity. The "analytics" then help you understand where your agents spend their time and how long it takes to process inquiries and transactions. It also surfaces opportunities to optimize technology, processes, coaching and training to enhance workflow efficiency. Table 1, on page 2, provides a snapshot of offerings in the market.

Three Paths to Optimization

There are several ways to clean up the agent desktop. Three common approaches include:

- Leverage in-house resources to build a custom front-end application or extend a home-grown applications' capabilities

- Extend the capabilities of a customer relationship management (CRM) solution

- Purchase a consolidated desktop application (CDA)

Any of these options require integration with the applications accessed from the desktop, with a variety of tools to facilitate integration and degrees of complexity in pursuing it.

While each option simplifies the agent's life, there's a fair amount of complexity "under the hood" to make it all work. Table 2, on page 3, provides a quick look at the tradeoffs to consider. The next section defines a process for pursuing the best option for your center.

A Systematic Approach Illuminates the Path

Most centers have lived with a suboptimal agent desktop—and watched it get worse—for years. In fairness, it's a tough nut to crack. Beyond the obvious technical challenges, there are a host of players—system and application owners, as well as business staff in multiple departments—who need to get involved to address integration issues and access restrictions, design user interfaces, create business rules and workflows, enhance cross-departmental collaboration and rationalize information sources. And depending on the approach you take, these internal users may be working with existing or new vendor partners to bring the desktop nirvana vision to fruition. The way to proceed is to break the project into discrete steps with milestones or outcomes that drive next steps and keep the project on track toward a successful conclusion.

STEP 1. DETERMINE THE FOUNDATION OF YOUR SOLUTION

Start by looking at the options for your foundational desktop optimization technology—homegrown, CRM or CDA. To support this decision, first look at what you have in place today and assess whether you have existing options to improve the desktop, building on an in-house system or CRM. Alternatively, identify if you want to look at CDA solutions. You can assess these initial options against some basic qualifying requirements. Work within the contact center to define the essential capabilities and process changes you'll pursue. Then the center and IT should work together to investigate all reasonable options and their tradeoffs, and the associated costs and benefits. An initial evaluation will help narrow the options and

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Table 1: Representative desktop analytics offerings

Offering	Representative Vendors	Notes
Analytics and Performance Management	Enkata	◗ Advanced analytics engine to drive performance improvements ◗ Results through peer comparison reports and the insights gleaned from them ◗ Translate results to action on coaching, training, development
Application Monitoring	Knoa	◗ IT focus ◗ Tracks user activity in each application ◗ Leads to application improvements and integration, process improvements
Workforce Optimization Suites	Nice, Verint	◗ Ties in with audio and screen recording ◗ Feeds to WFM for forecasting and scheduling phone or non-phone work ◗ Feeds to analytics and scorecard tools and other elements of performance suite

What Is CDA?

A consolidated desktop application (CDA) is a tool that delivers a "portal" that the agent uses to access and navigate primary applications. CDA tools configure the desktop to allow a logical interface and flow to the agent, often automating keystrokes previously required of the agent. The portal can also present links to supporting systems or information. CDA solutions often have some basic CRM-like capabilities, as well. Representative vendors include Jacada, OpenSpan and Cicero.

Features and functions typically found with CDA include:

- Single sign-on to multiple applications
- Single view of the customer
- Visual integration (desktop, dashboards, toolbars)
- Different interfaces and roles (e.g., workflows) for users based on their business function
- Workflow automation and business logic
- Smart tab into multiple applications
- Context-specific help
- CTI integration
- Training routines that walk agents through procedures
- Call scripting
- Upsell and cross-sell capability
- Business rule adherence and compliance
- Alerts tied to defined thresholds or triggers
- Call wrap-up data capture
- History tracking and reporting

Table 2: Comparing desktop optimization options

	In-house Developed	CRM Vendor	Consolidated Desktop Application (CDA) Vendor
Pros	◗ Builds on the foundation of an existing application ◗ Leverages resources who are already familiar with the business ◗ Supports custom requirements ◗ Gives company control over the nature and timing of enhancements	◗ Modular architecture ◗ Supports links to other systems ◗ May integrate with CDA ◗ May have workflow capability ◗ May have knowledge management component that further promotes agent productivity ◗ Can drive cross-sell/upsell activity	◗ Less architectural complexity ◗ Experienced providers adapt the application to specific work groups ◗ Can integrate with CRM ◗ Affords a range of possibilities (not one size fits all) ◗ Fastest development cycle - Makes piloting attractive
Cons	◗ Long development cycle ◗ Any development is driven by one company (not spectrum of customers) ◗ In-house responsibility for software updates and maintenance ◗ Request for new features compete with all other projects on IT's plate	◗ More complex than a CDA ◗ Longer development cycle due to larger scope of CRM capabilities ◗ Still requires IT resource involvement	◗ Still requires IT resource involvement ◗ More systems could drive more complexity
Best Fit	◗ Solid in-house development team with application(s) that can be readily adapted to serve as "portals"	◗ New or updated solution in which sales, service and account components play prominent role in agent's information arsenal	◗ In-house, customer information system (CIS) and/or CRM solutions are not available options ◗ Seeking rapid solution to optimize desktop
IT effort required (Intrusiveness)	◗ High level of effort to maintain, especially if the system has been around for a number of years	◗ Generally driven by back-office system ◗ Easier with APIs ◗ Easier when browser based	◗ Generally driven by back-office system ◗ Easier with APIs ◗ Easier when browser based
Level of change	◗ Potentially higher due to customization ◗ Often built using what is now outdated code technologies—which complicates managing application change ◗ Major process to change agent interface	◗ Depends on the amount of application customization vs. configuration—often leans toward more customization—causing a high level of effort in managing application changes ◗ User interfaces often not designed with contact center agent in mind	◗ Using newest CDA technologies level of change efforts are less—can be higher level of effort if integrating with older mainframe applications ◗ User interfaces generally designed specifically for contact center agent, improving their work flow
Vendor examples	◗ Mainframe—green screens ◗ Visual Basic ◗ Oracle Forms ◗ C++ ◗ .Net	◗ Microsoft Dynamics ◗ Pegasystems ◗ RightNow ◗ Sage ◗ Salesforce.com ◗ SAP	◗ Altitude Software ◗ Cicero ◗ Cincom ◗ Jacada ◗ OpenSpan ◗ Seagull Software

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focus the effort. Refer to Table 2 (page 3) for key considerations.

STEP 2. FRAME THE SCOPE

Once you've decided upon a technical foundation for your solution, you'll need to determine the scope of the effort. You may have dozens of applications you'd like to address, but if you try to tackle everything, you'll likely wind up with nothing. Before you get too far, be sure to put an ear to the ground to see if the company has already launched consolidation efforts that will render some existing applications obsolete. Set priorities around capabilities that deliver the highest and/or fastest payback—e.g., login management, high-use applications, least complex integrations. Remember to keep process/workflow redesign in mind as part of your target improvements.

As you define scope, you'll also want to consider the ties to computer telephony integration (CTI). Define the screen(s) that you'd like to pop when agents receive calls at their desktops. Assess the value of popping an optimized screen with relevant information and links to other applications and knowledge sources. Think about integrating softphone capability into your consolidated desktop.

You may also wish to think about how this effort ties in with unified communication (UC) technology—e.g., collaboration, presence and instant messaging (IM). If your agents need information from other departments, you'll want to eliminate needless jaunts around the building and messages awaiting response by providing tools to conveniently connect with their colleagues.

Figure 1: Desktop complexity

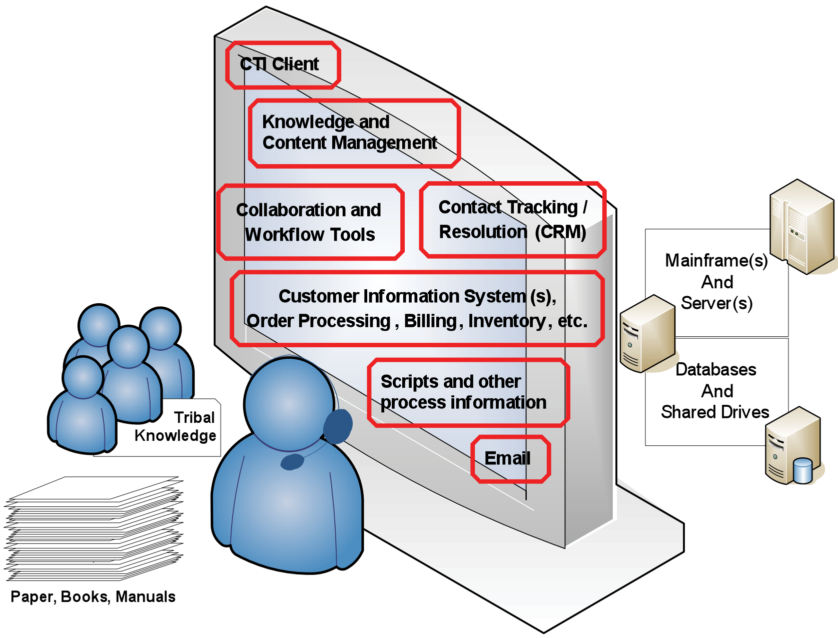
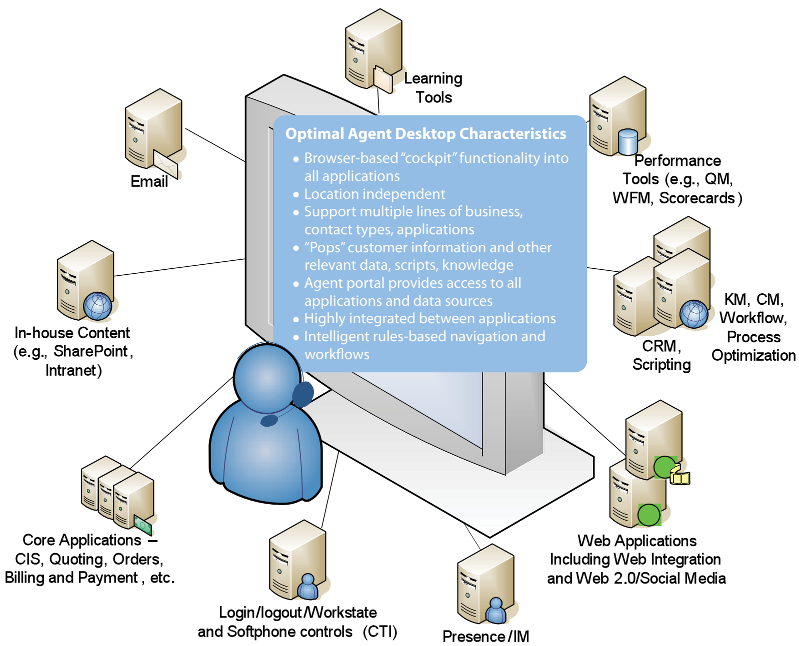


Figure 2: The well-ordered agent desktop of the future



STEP 3. ACCOUNT FOR YOUR CONSTRAINTS (RESOURCES, TIME, MONEY) AND DEFINE PHASES

All projects inevitably face the cold, hard facts that there are only so many resources, so much time, and so much money to go around. These constraints will impact the scope of your project. Look for logical functional groupings that you can schedule in phases—by application, functional group, process, etc. The scope decisions you make in the previous step will also serve as input to help define a phased plan. This approach improves the likelihood that you can get the effort off the ground with some relatively quick gains, and enhances your future budgetary requests through use of proven results/benefits. As part of this step, you also need to identify agents, subject matter experts (SMEs), and IT resources that you can enlist on your project team.

STEP 4. SOLIDIFY YOUR SOLUTION APPROACH AND COMPLETE YOUR PLANS

This step will look very different depending on whether you are pursuing an in-house solu-

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tion, building on an existing vendor product (e.g., CRM) or pursuing a new CDA solution. The primary considerations are:

- **In-house.** Define your specifications, size the IT project and define the timeline
- **CRM add-on.** Work with your vendor to develop the plans to integrate your CRM with the chosen applications, and to support the other desktop changes defined in your previous steps. Clearly differentiate configuration, integration, third party/partner modules and customization needs.
- **New CDA.** Develop a requirements document and seek competitive bids to evaluate vendor alternatives. Conduct full due diligence to find the best solution for your needs.

STEP 5. REFINE YOUR PROJECT ROI AND PLAN

After you nail down your approach and plans, work with your project team members, your vendors and other skilled resources to compute the total cost of ownership (TCO)—i.e., what it will really take to design, test, pilot, implement, support and maintain your solution. Compare the TCO against measurable labor efficiencies and services improvements that you expect to realize, resulting in your return on investment (ROI) projections. Refine your scope, as needed, and finalize the plan with all defined phases.

STEP 6. GAIN APPROVAL

You should be in dialog with management throughout the planning phase to gauge their probable responses, concerns and decision criteria. If you sense resistance, consider options such as a small pilot with an interested vendor to demonstrate the value of desktop optimization. Management will want some assurance that they're allocating resources to the highest value investments. Have a few options in your project's "hip pocket" to increase the odds that you'll get a "yes."

STEP 7. IMPLEMENTATION

Implementation includes the usual steps—design, develop, integrate, test and rollout. As noted, a pilot may be an important step early in the project, or a key part of the implementation. Be sure to include usability testing with a representative sampling of agents to solidify the desktop design and capabilities.

STEP 8. BE PREPARED FOR A POST-IMPLEMENTATION ASSESSMENT

Compare post-implementation results against the baseline you defined to justify the project expense. Use desktop analytics and contact center statistics to drive continuous improvement in your technology and processes.

Work Together to Achieve the Potential

Few projects in the contact center have the potential to make a substantial positive impact on agent efficiency and improve service. Desktop optimization can. As the convoluted maze that agents suffer every day gives way to the well-ordered desktop of the future (see Figure 2), agents will handle calls in less time, with higher first-call resolution, fewer errors, superior service and greater job satisfaction.

Make the case to put optimizing the agent desktop on the top of the priority list for your center, and make the commitment to the technology, resources and process changes to reap the benefits.

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