Desktop Integration Leads to Process Optimization

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With contact centers always searching for ways to improve performance, the agent desktop just could be the next best place to look. Desktop optimization can streamline processes and reduce handle times as well as simplify training and navigation between systems or applications.

When I sit with agents for call observations, I often find that they have many applications open at the same time – even several instances of their Customer Information System. You see them expertly jump between applications – some browser-based, some legacy or "green-screen." You see precious seconds wasted when agents update information by cutting and pasting data between multiple systems – or worse, write things down and then type them back in. When your CSRs are the integration points for your disparate applications, you'll wind up with longer training, longer AHT, and higher error rates.

There is hope! A consolidated desktop application (CDA) has characteristics that can transform the desktop and improve operations quickly. Typical features include:

- Browser-based "cockpit" serving as an agent portal, providing access to all applications and data sources
- Support multiple lines of business, contact types, applications
- "Pops" customer information
- Highly integrated between applications
- Intelligent rules-based navigation and workflows
- Single sign-on and customer view

Where do you turn for help with your desktop optimization project? Typically there are three paths to consider:

1. You could ask your IT department to <u>build</u> it for you. If you're pursuing this option, make sure IT has the time and expertise to build it, as well as maintain and enhance it. Otherwise, you're better off looking at solutions available in the market.

2. You could look to a <u>CRM</u> vendor, especially if you already use one in your enterprise. Many CRM vendors have pre-built integration points to a variety of applications. They often include work flow engines to facilitate contact handling processes. Pega Systems (www.pega.com) and Salesforce.com (www.salesforce.com) are examples of applications that efficiently ingrate the desktop.

3. You could consider a <u>CDA</u> provider. These vendors focus on desktop integration and process improvement; many offer data capture and analytics as well, enabling you to see what is occurring at the desktop and further optimize. They often have CRM "lite" functionality. Representative players include Jacada (www.jacada.com), Openspan (www.openspan.com), or Cicero (www.ciceroinc.com).

If you are ready to tackle desktop optimization, consider a trial to capture key metrics to build a business case for a full deployment. Many of the vendors will work with you to identify systems and processes that

they can optimize. This approach lets you prove out the value with a relatively low investment of time, money, and resources. Three areas to evaluate:

- Reduced handle time. The optimized desktop provides easy 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.
- Reduced errors and increased first call resolution. With an optimized desktop, you reduce errors and re-work while providing more efficient access to information. The company and the customer benefit.
- Improved agent proficiency. Simpler processes and system interfaces shorten training time and allow new agents to become productive sooner.

The agent desktop can be vastly improved through technology that doesn't take forever or cost a fortune. Not only can you improve some of your metrics like handle time and training time, you are taking a noteworthy step toward improving agent and customer satisfaction.