

Customer Experience Solutions

Optimizing the Agent Journey to Perfect the Customer Journey



Changes in Customer Behavior Dictate Changes for Agents

Can it be just 25 years ago that customer service involved finding the 800 number, picking up the phone and connecting to a live customer service agent? It's likely difficult for most of today's consumers to fathom, but it was only in the 1960s that touch—tone came to telephones and another 20 years before interactive voice response (IVR) systems became mainstream. Reminiscent of the introductory sequence to the popular television show *The Big Bang Theory*, it's hard to believe that customer care's progress from the simple phone call to today's multi—touch world has happened in a single generation.

Global systems integrator Dimension Data has been tracking the progress of contact center technology through in—depth interviews since 1997 and publishing the results in its Contact Centre Benchmarking Report. It is widely acknowledged as one of the most useful, authoritative, and comprehensive reports of its kind. The most recent edition reported that in just one year, from 2015 to 2016, the percentage of telephone contacts handled by respondent contact centers was down from 65.7 to 57.7 percent.

For years, pundits have predicted the end of the live agent, voice—driven contact center. It was initially forecast that voice would be replaced by email. And then by chat. And then by social media or mobile applications. And most recently by video, a la Amazon Mayday or Salesforce SOS. What instead has happened is that it is the combination of these digital media choices that are replacing voice—countless combinations of channels for different types of consumers and interaction types.

Customer Journeys Start on the Web or Mobile App



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What has become increasingly clear in the past few years is that as consumers use multiple digital channels, the support they receive from customer service agents they speak to as part of that process is often sub-optimal.

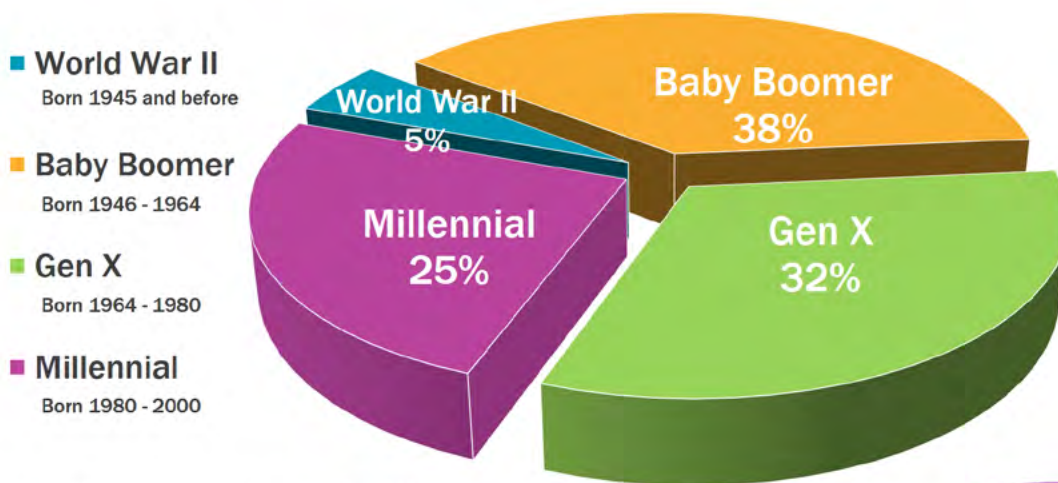
While customer behavior has changed to encompass multiple touch points, the scheduling, evaluation and training of agents has not always kept pace.

Gone are the days when customers called a bank to find out if a check cleared or a retailer to order a pair of shoes. Companies deliver and customers embrace self-service options—primarily on the web or from a mobile device. When customers pick up the phone or open a chat with an agent, it is generally because self-service hasn't worked. It is because the issue is out of the ordinary and/or too complex to get an easy, self-service answer. These customers have typically taken 3–5 steps prior to engaging with a live agent. They have been on the company's mobile application or website, they've done a search on your company website to try to get an answer to their question, or perhaps looked for a YouTube video. Whatever the previous steps, too often when the customer finally gets to an agent, they are frustrated and want fast answers. They are looking for a super agent, someone who knows all the steps they have already taken, why they are frustrated and how to get them an answer in a reasonable amount of time—in a single contact.

Much of the discussion about the workforce's ability to handle today's omnichannel contact center environment centers on millennials. It is said that they can easily manage multiple simultaneous interactions and juggle several different interaction channels.

Yet while it is true the millennials are an important part of today's contact center workforce, Generation X and Baby Boomers still represent significant pieces of the workforce pie. One of the messages in the chart is that companies need to find effective ways to train, engage and incent agents of all ages.

Generation Demographics: Workforce Participation



Source: "Leading a Multigenerational Workforce," AARP



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New Challenges, Old Tools?

A look at the workforce optimization (WFO) processes at a sampling of contact centers would reveal that while some are taking advantage of the latest applications to create the Super Agent required by today's consumers, many are mired in traditional—often manual—processes. Consider the task of monitoring agent calls and providing coaching to agents. You can still find supervisors going into a room to listen to live calls and taking notes on a scoring form to later discuss with an agent.

In only slightly more progressive centers, the monitoring process may have been formalized with Excel spreadsheets. In both scenarios, supervisors are typically evaluating calls randomly, hoping that a "tough" or "problem" call occurs that will allow for valuable coaching.

In too many contact centers, the monitoring process remains cumbersome, complex and time consuming. As a result, monitoring and coaching is not done as regularly and consistently as required to create knowledgeable agents.

Similar dependence on spreadsheets versus dedicated workforce management applications is seen in agent forecasting and scheduling. The rule of thumb used to be that centers with fewer than 100 agents did not require workforce management applications—but that was in a voice-only world. Complexity is multiplied with the addition of email, webchat, SMS, etc. It is no longer reasonable to expect a manager with a spreadsheet to do an adequate job juggling multi-skilled agents with omnichannel interaction requirements.

Several years into the explosion of chat, email, social interactions, many companies that have taken the important step of deploying a workforce management (WFM) solution use it only for the forecasting and subsequent scheduling of voice interactions. WFM solutions were

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designed to make sure that the right person with the right skills was available at the right place at the right time and the techniques used to build that software were based on voice call volumes, e.g., Erlang C models. A five-plus year old WFM solution likely does not include the necessary upgrades to accurately forecast, schedule and monitor agents for all engagement channels.



The Quality Assurance Agent Journey

In addition to customers and agents, quality assurance (QA) agents are on a journey as well...to accurately complete assessments that will guide agents in providing better customer experiences.

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AWFOS also helps make the QA agent's job easier by being able to see the screen recording as well as hear the call.

"Before screen recording, QA agents typically would access a call recording, pull up the host system to figure out the account number and then have a score card separately—3 different applications running. With AWFOS, when the QA agent pulls up the recording, they have the screen capture, so they can see the account and the score card is right there—one application instead of three."

In summary, Wyatt said, "We love AWFOS. We deal with the 5 largest financial institutions in Canada and two American credit card companies so, it's all about compliance for us. CCA goes through 12 different audits a year." Having AWFOS means seamless audits for CCA and their customers.

"In the past, it could be quite tedious, because sometimes it can be difficult to understand an individual agent's speaking mannerisms when, for example, trying to discern the company name, address and postal code. It might take five to seven minutes to find the account. Instead of having to listen to a recording two or three times, and then cross-reference things in the notes, the customer information can be read directly from the screen recording."

The Modern Contact Center Manager's Arsenal

What tools can contact center managers and supervisors employ to create the Super Agents customers are not only looking for but deserve? The good news is that a host of new capabilities have been built to address the needs of the digitally transforming customer care operation.

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Omnichannel Quality Management

Most contact centers today have systems in place to record calls and a large majority of companies have incorporated the best practice of recording 100% of calls. But what happens to all those recordings? In some industries, companies record calls for compliance reasons. In others, all calls are recorded “just in case” there is a problem.

Forward-thinking—and typically very large contact centers—began installing quality monitoring solutions several years ago. In the centers where it is deployed, quality monitoring applications help a business to both formalize and automate the agent monitoring process. Over time, the cost to deploy this increasingly table-stakes feature has declined and it is affordable for even the smallest centers. No longer does a supervisor or monitor have to “catch” a call that needs training or reward. Instead, the quality management system can select for review calls that meet certain criteria, such as multiple transfers or unusual length.

A recent technological development in quality monitoring is the simultaneous recording of not just the voice interaction but all the activity on the agent's screen. The need for screen recording has become even more important as the proportion of non-voice interactions has steadily increased. The increased use of customer relationship management (CRM) applications also highlights the need for screen recording. It allows the supervisor to truly understand the steps followed by the agent, in the precise order they were taken, in attempting to resolve the customer's issue.

Omnichannel Workforce Management ... and beyond

The increasing volume of digital interactions into the contact center is impacting how agents should be scheduled. Digital interactions bring new challenges that modern WFM solutions are designed to help companies handle. How many simultaneous chats does a company want an agent to handle? If inbound voice calls increase, should chat agents be shifted to voice? Are there service levels for email that require agents to be assigned to email even if voice traffic is spiking? Current releases of WFM solutions allow contact centers to ensure that not only are customers being given access to the digital channels they want to use, but that there are a suitable number of skilled agents available to handle those interactions.

Beyond multi-channel recording, quality management and workforce management, a host of additional workforce optimization tools are now part of contact center management's toolkit—and available as easy add-on modules to WFM. Agent preferences provide employees with an active voice in the defining of preferences for their schedule. This not only increases satisfaction, but also reduces or removes the need for repeated, cumbersome shift bids. Vacation planning is another module that helps agents view their remaining annual leave and put in a request for vacation time. Shift trading modules to view colleague schedules and send a request for a trade. Rules are established by the planning team to ensure that agents can do swaps without affecting service levels.

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To improve motivation and performance, today's leading WFM solutions have introduced the use of gamification. It gives agents the ability to engage in a fun, game-like environment that have been shown to not only help lower attrition and boost motivation, but provide real-time insight into their performance without needing a managerial review. As with all of the newest features discussed here, gamification can be an easy phase—two add—on to WFO deployments.

Build Your Agent Journey Roadmap

As companies embark on digital transformation, much of the emphasis will be on implementing new interaction channels, like SMS or Facebook Messenger and how each channel fits into the overall customer journey. It is equally important to understand how talent fits into the equation. The agent workforce must be able to handle communication on varied channels that demand different styles, yet be consistent. They must also be able to take contextual information from multiple sources and use that in a way that benefits the customer.

As you think about what changes you want to make in the tools and processes you use to create a first-class customer experience, consider the views of agents to understand the areas where they see inefficiencies and problems. Agents spend all day working with customers and can often bring valuable insights in the mission to improve customer experience.

Attempting to deliver the effortless experience customers demand using antiquated contact center management tools is doomed to failure. Updated quality management and workforce management tools not only enable a company to create, maintain and support a best practice culture, they result in a more empowered, engaged workforce. A modern workforce optimization suite, that can be expanded both in size and functionality as business needs require, is key to helping businesses find the required balance of digital and live interactions in their customer experience approach.

About the Author

Sheila McGee—Smith, the founder and principal analyst at McGee—Smith Analytics, is a leading communications industry analyst and strategic consultant with a proven track record in new product development, competitive assessment, market research, and sales strategies for customer care solutions and services. Her insight helps enterprises and solution providers develop strategies to meet the escalating demands of today's consumer and business customers. She is the contact center track chair for Connect. Her views on the market can be found regularly on NoJitter.com and through her Twitter feed @mcgeesmith

