

Whitepaper

Using Integrated Agent Desktops to Enhance Customer Experience and Agent Productivity



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Introduction

Customers are more connected than ever today—more online... more mobile... more comfortable with a wider range of digital interactions.

That puts increased pressure on contact centers to meet rising customer expectations—to successfully answer questions faster and more easily on more channels and across more touch points. That’s the essential customer experience challenge companies face today.

Without a doubt, technology plays a major role in delivering a better customer experience. Artificial intelligence, chatbots, analytics, smart devices, and more will all be part of the customer experience story.

So will new tools for agent desktops. Why? Agents need easy access to increasing amounts of information and tools to keep pace with the ever-evolving customer expectations.

Although digital and self-serve technologies were expected to diminish the role of agents, they have actually increased it—research shows that agents today are expected to be more versatile and multiskilled, handling more transactions across multiple channels. With more and more routine inquiries being resolved through self-serve channels, agents are increasingly called upon to handle the most complex and demanding customer interactions—the ones with the biggest impact on revenue, customer experience, customer loyalty, and brand.

To achieve all of these tasks successfully, agents need a new generation of knowledge management tools.

Just 20 years ago, the top trend in customer experience was how telephone interactions were replacing face-to-face meetings.¹

This whitepaper focuses on the role that fully integrated agent desktops can play in successfully enhancing the customer experience and agent productivity. These desktops...

- give your agents efficient access to the tools and information they need to support any customer experience
- empower your agents to personalize customer experiences
- make use of service-oriented infrastructure elements (e.g., thin clients and widgets) to speed up the process and lower the cost of equipping agents with the tools they need to handle today's complex interactions

Technology Feeds on Itself

Nearly 50 years ago, futurist Alvin Toffler, while coining the terms "future shock" and "information overload," noted that when technology is used to address immediate challenges, it inevitably generates new ones: "Technology feeds on itself," wrote Toffler. "Technology makes more technology possible."

Consider the world of customer experience Exhibit A for demonstrating the truth of Toffler's observation.

- Instead of wrestling with increasing call volumes and long hold times in their voice-only call centers, today's enterprises struggle to manage fragmented interactions in their multichannel contact centers.
- New self-service and digital channels have lessened the number of routine interactions handled by agents but increased the number of complex interactions.
- More touchpoints mean more opportunities to collect data and understand customer behaviors, but doing so successfully requires new analytical tools.

Choice vs. Experience

A key issue, according to the consulting firm McKinsey, is that as companies focus on offering choices and using technology to address immediate problems—such as call volumes—they lose sight of the endgame: the overall customer experience being delivered.²

Today's customers want to choose how and when they contact you (or are contacted), but the experience they will most remember and judge you on is how well you answer their questions.

By focusing on technology alone to solve their contact center challenges, executives often lose focus of the core operations and upset the balance between human interaction and automation.

Supporting both traditional and digital channels AND delivering a consistent level of performance across all channels is a winning strategy. Adding new channels to an underperforming environment—and introducing them without the proper integration, management, KPIs, training, or customer awareness—is a recipe for customer frustration.

¹ Dimension Data Global Customer Experience Benchmarking Report
² McKinsey, *Why your call center is only getting noisier*, July 2017

The State of Today's Contact Center— What the Data Tells Us

The frenetic, push-pull pace of change in today's contact centers is reflected in the 2017 Dimension Data Global Customer Experience Benchmarking Report—an in-depth survey of 1,351 customer experience decision-makers from 80 countries across 14 industry sectors.³

This 100+ page report provides a telling snapshot of the progress and challenges organizations are dealing with on their customer experience journeys. Here are just a few highlights:

Customer experience requires going beyond channels and touchpoints and focusing on strategy, design, ownership and the human touch.

Customer Experience—Overwhelming Recognition/Massive

Underperformance: Most enterprises participating in the study declared the customer experience they deliver to be their primary differentiator, trumping product, price, and other traditional factors. At the same time, they acknowledged massive underperformance in meeting their goals: nearly two-thirds self-rated the customer experience they deliver as seven out of ten or worse. Just 3.6% of enterprises gave themselves credit for doing all they could.

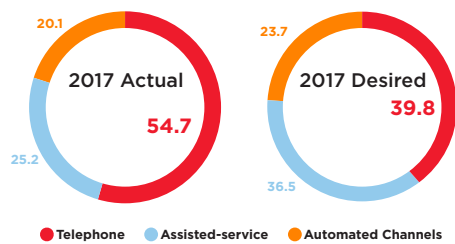
Multichannel But Not Omnichannel: Supporting an average of 11 channels, the clear majority (80%+) of organizations are now multichannel. But these channels remain siloed—only one in three organizations have even a few channels interconnected. Interestingly, one in five organizations is now doing the right thing—passing all available information from self-serve channels to a receiving agent. But far more common, accounting for 39% of organizations, are completely blind transfers—callers must repeat their story all over again. That's an improvement from 2013, when it was 54.1%, but it's far from ideal—customers absolutely hate repeating their stories.

The Persistence of the Phone: Many people predicted the telephone would have all but disappeared from the contact center. Far from it—the phone remains the most prevalent interaction channel:

- In 2013, the breakdown of actual interactions (see chart next page) was 66% for telephone, 17% for assisted-service, and 17% for automated channels. Today, it is 55% for telephone, 25% for assisted-service, and 30% for automated channels.
- The data clearly shows the rise of other channels, but for all the most urgent outreach interactions (see chart next page)—complaints, service inquiry updates, sales/marketing, and default notices/collections—the phone is still the channel of choice. Email is a distant second, followed by social media (used primarily in sales and marketing) and outbound calling (primarily used for collections).
- The phone isn't going away anytime soon. According to the report, voice will remain a favored interaction channel, often complemented by video or other assisted digital channels, as an escalation option and/or for more complex service needs.
- Reliance on the phone in proactive outbound techniques is also likely to increase thanks to improved analytics and increased outbound automation.

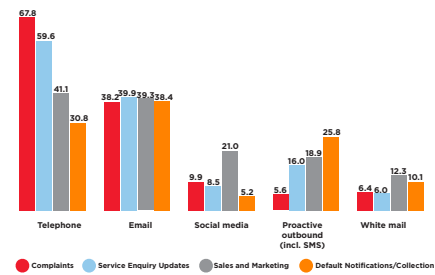
³ Dimension Data Global Customer Experience Benchmarking Report

Actual versus desired *interaction split*



Source: Dimension Data Global Customer Experience Benchmarking Report

Preferred channels for *initiating contact*



It’s Generational: Mobile apps have become the first-choice contact channel for those aged 25 to 34, followed by email, web chat, and social media. While the proportion of contacts handled by telephone falls yearly, it remains a key escalation option and is still the predominant channel of choice for everyone over the age of 55.

Customer Journeys Untracked: Today’s enterprises have gotten the message—their customers are on a journey, often moving through several forms of contact in a single interaction. But many enterprises still have not taken the necessary steps to track and manage these journeys, interconnecting interactions to deliver relevant, contextual information. When organizations focus on customer journeys, it’s often to do process mapping or seek new methods of efficiency. Of the two-thirds of organizations who report tracking customer journeys in some form, fewer than half have put in place automated processes for doing so.

Asking Agents to Do More: Most agents (62.5% in 2017 vs. 68.3% in 2016) are dedicated to providing support over the telephone. But today, agents are more likely to be cross-trained to handle multiple transaction types (e.g., general service alongside technical support) AND perform some form of assisted service on other channels (e.g., email, web chat, etc.). The need for agents to provide support for a wider scope and a greater number of complex processes and functions will continue to grow, not decrease. As organizations’ ambitions to be omnichannel outweigh the actual infrastructure to make it happen, the report notes that “agents are handling the fallout and being asked to resolve what are increasingly complex customer escalations.”

The Unrealized Promise of Analytics: Participants in the benchmark study cited analytics as the top factor that will change customer experience. Yet, fewer than a third use analytics to fuel their channel and contact management strategies. According to the study, many organizations only look at superficial data, severely limiting their ability to deliver personalized experiences to customers.

A New Focus on Agents

The current state of the contact center—multichannel but far from omnichannel; struggling to track customer journeys; hard-pressed to serve consistently across channels; relying more and more on the human element—is putting a renewed focus on tools that support agents.

Agents are needed for customer interactions that go beyond the scope of automated channels, including when artificial intelligence proactively identifies the need for additional support. These higher-value and more sophisticated interactions offer an opportunity to deliver a level of service that makes a lasting contribution to overall customer experience.



Agents now spend about two-thirds of their time managing customer interactions across different communications channels. When agents jump from screen to screen, service inevitably suffers, robbing both the caller and the agent of time. Furthermore, agents can’t easily access the information cues and prompts that enhance service.

According to the Aberdeen Group, agents typically use three screens to resolve an inquiry (that's down from five in 2012), and switching screens consumes 15% of an agent's time. Aberdeen estimated that, assuming an annual labor cost of \$35,000 per agent, all this jumping from screen to screen costs a 300-seat contact center some \$1.57 million each year.⁴

This cost has helped make agent productivity today's top operational priority.

Agents and other customer-support personnel need...

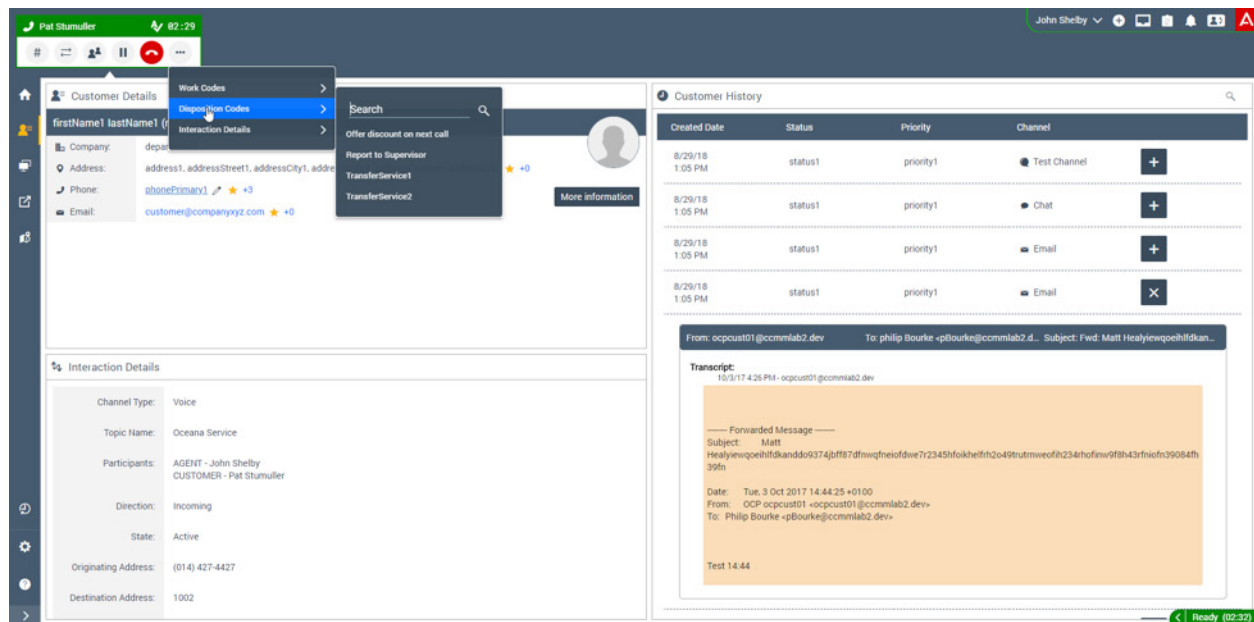
- quick access to pertinent customer information
- the ability to see the entire customer journey
- real-time visibility into why customers are calling
- the ability to quickly drill down on any interaction

All that and more is being delivered by today's new integrated agent desktops that help organizations meet rising customer experience expectations.

The New Agent Desktop

Integrated agent desktops are specifically designed to quickly provide agents with the information they need to make better decisions, personalize experiences, and anticipate customer needs.

The key elements include the following:



An example of an integrated agent desktop—the Avaya Workspaces solution.

Consolidated Agent Views: The interface brings together information—customer profiles, buying history, interaction journeys—making it all instantly available in a single, consolidated view, including the following:

- Critical data from CRM, knowledge management systems, and other internal enterprise systems (e.g., ERP)
- Cues and tools, such as preferred language, tips on overcoming objections, and other automated prompts
- Tools that help eliminate time-consuming lookups and manual processes such as offline note-taking

⁴Aberdeen Group, *Agent Desktop Optimization: Three Strategies to Maximize Agent Productivity & Customer Experience*, May 2015

Tracking the Customer Journey: When customers move between channels, do you track their interaction touch points by communications channel? You can with an integrated agent desktop, empowering your customer support personnel to make better decisions and personalize service by enabling agents to view and interact with the customer journey touch points while engaging with customers.

Access to Collaboration Tools: An integrated agent desktop works with collaboration tools such as messaging, presence, video, and screen-sharing, enabling quick access to subject matter experts throughout the enterprise (beyond the contact center) to increase first contact resolution.

Agent Engagement and Satisfaction

Don't underestimate the importance of enhanced tools for increasing agent satisfaction and retention. According to McKinsey, the value of equipping your agents with the right tools can be striking: Satisfied contact center employees are significantly more likely to stay and to refer their workplace to a friend. And they are more than three times as likely as dissatisfied colleagues to feel empowered to solve customer issues.

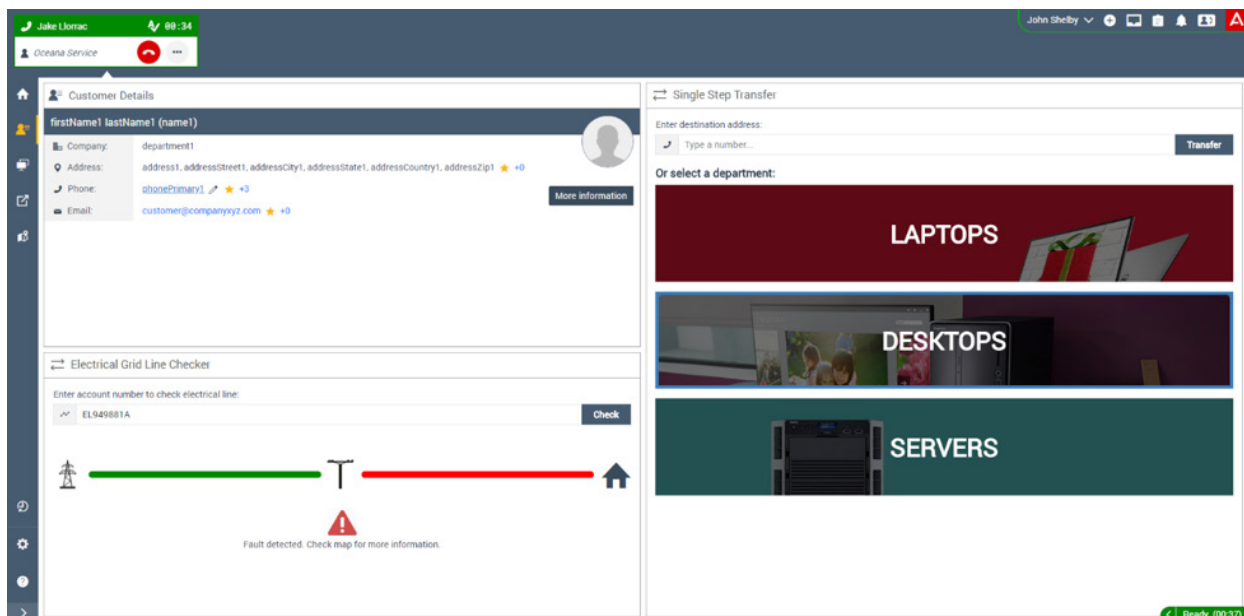
These factors have a direct bearing on the quality of customer service and the operational cost of delivering it.⁵

The Role of Thin Clients and Widgets

In the Dimension Data Benchmark Study, technology was voted the number one enabler to positively transform customer experience. Yet, over a quarter of organizations say their technology systems are failing to meet current requirements.

The primary problem is an old one: the IT bottleneck.

- When contact center operators need to extend the functionality of an agent desktop, the lack of IT resources leads to long lead times and compromised improvements.
- Current agent desktops are often coupled with backend systems, which, in many cases, leads to a rip-and-replace approach.
- The cost of managing and downloading thick client desktops inhibits agent desktop improvements.



An example of a widget being implemented in the Avaya Workspaces solution.

⁵ McKinsey, *Boosting contact-center performance through employee engagement*, March 2018

According to the benchmark study, CRM/agent desktops have become the most popular cloud deployment in contact centers.

However, enterprises can also turn to thin-client architecture and widgets to deploy integrated agent desktops into existing premise-based contact center architectures.

Thin Clients: Thin client solutions provide the advantages of a fully powered PC without the headaches:

- No need to rip and replace—thin clients integrate seamlessly into existing contact centers
- Lower cost to acquire, manage, and maintain than traditional PC desktops
- Management, maintenance, and application updates are all centrally delivered
- Decreased energy and space concerns with a reduction in power and cooling needs
- No plug-ins or downloads
- Completely browser-based with all call and media controls available within a browser

Widgets: A widget is an application extension that provides a way to seamlessly manage the distribution of information to or from the agent desktop, eliminating the need to open another application. Widgets make it possible to incorporate new functionality in hours and days instead of weeks and months using basic HTML5 skills.

Typical examples of widgets that might be integrated into an agent desktop include the following:

- **Notepad to CRM:** Enables agents to take notes digitally and seamlessly transfer them to a CRM solution, automatically adding the channel, agent's name, and agent ID
- **Calendar:** Provides agents with a quick overview of upcoming events, promotions, training, etc. that might be helpful to them, without having to open the Calendar application
- **Tag cloud:** Depicts words mentioned during customer calls, allowing agents to quickly see what topics are trending and provide insights into current customer needs
- **Weather:** Presents the weather for the caller's location, giving agents a natural way to personalize the call and engage customers

The Future of Customer Experience

These are challenging times in the world of contact centers and customer experience.

While customer experience has been recognized as a top priority and differentiator, customer satisfaction scores (according to the benchmark study) have dropped to a historic low: from 80.4% in 2008 and 72.4% in 2013 to 68.4% today.

At the same time, the benchmark research highlights how the top organizations are performing up to ten times better than average in a range of key metrics, such as...

- Response times
- Handle times
- First-contact resolution

While there is no turning back the clock on the way digital technologies are transforming customer experience, simply following the mantra of providing channel choices will leave you significantly short of achieving your objectives.

A strategy that delivers real results makes intelligent use of all channels and the resources that support them, including what is likely to be the most important resource of all: highly skilled agents working seamlessly with technology, empowered to resolve complex, high-value interactions.

Providing your agents with the right supporting tools and integrated technologies—and supporting them with the required context and content—are the keys to driving customer experience AND agent productivity.

That's what integrated agent desktops can do—starting today.

