

# Using Workforce Optimization (WFO) to Enhance your Customer Experience Strategy

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## Introduction

Your contact center is one of your most important resources—you will want to do everything you can to keep it operating at peak performance, consistently delivering the customer experience critical to your success while also complying with a growing number of legal requirements contained in laws such as the European Union’s General Data Protection Regulation (GDPR).

In the past, many enterprises relied on point solutions to optimize their contact center operations, employing different applications to address specific challenges, such as shift scheduling or recording calls for compliance.

But as customer experience strategies grow in importance and scale, at the same time becoming more omnichannel and more regulated, this kind of siloed approach typically proves inadequate.

As a result, many organizations are replacing older, single—purpose applications with integrated workforce optimization (WFO) solutions specifically designed to deliver the following:

- **Holistic Omnichannel Support:** Enabling comprehensive optimization of performance and quality across a wide range of customer experience channels.
  - **Advanced Analytics:** Providing advanced tools, such as speech analytics, to gain critical insights into performance and trends.
  - **Process Automation:** Streamlining operations using preprogrammed trigger points and application linkages to automatically generate alerts and corrective actions, including agent training.
  - **Compliance:** Addressing key requirements of data privacy laws such as GDPR by providing data tagging, encryption, and other tools that can help avoid noncompliance penalties.
- The result is a more effective approach to contact center optimization—more comprehensive, more results—focused, and easier to implement.

**As customer experience strategies grow in importance and scale, at the same time becoming more omnichannel and more regulated, more organizations are turning to integrated workforce optimization (WFO) solutions.**

Interested? Take advantage of this whitepaper for an in—depth look at how today’s WFO solutions address key challenges in delivering effective, efficient, and compliant omnichannel customer experiences.

## **I. The New World of Customer Experience**

More than fifty years ago, the first toll—free 1—800 numbers helped launch a revolution, turning phone—based sales and services from a business sideline into a major strategic focus and paving the way for the contemporary world of 24 / 7 / 365 customer engagement.

Today, the myriad of interactions that take place online, on smartphones, or via other devices and social media constitute the primary ways many organizations engage customers.

Delivering the best customer experience across multiple channels has become a core business process and a key source of competitive differentiation. According to Gartner, more than two—thirds of marketers now say their companies compete mostly on the basis of customer experience<sup>1</sup>

However, as the stakes for delivering the best customer experience have risen, so have the challenges. Today’s multichannel customer journeys are infinitely more complex than those of the phone—only era. More interactions on more channels mean more opportunities to win a customer for life—and more opportunities to lose one.

According to Accenture, more than half of all customers immediately stop doing business with a company following a poor sales or marketing experience, with most taking their business to competitors and a quarter spreading the word on social media. The estimated cost to companies: \$1.6 trillion.<sup>2</sup>

But the upside potential of customer experience done right is just as significant.

In a study on the impact on revenue growth, Forrester found that enterprises that were leaders in customer experience collectively enjoyed a 14—percentage—point advantage over competitors that lagged.<sup>3</sup>

A study by Avanade and Sitecore found that among enterprises who actively foster a strategy to improve customer journeys, 40% have seen increased revenue, 37% have witnessed improved sales cycles, and 34% have enjoyed increased profitability.<sup>4</sup>

A key factor in achieving these positive outcomes is the ability to continuously optimize the contact center.

- More than two-thirds of marketers now say their companies compete mostly on the basis of customer experience.

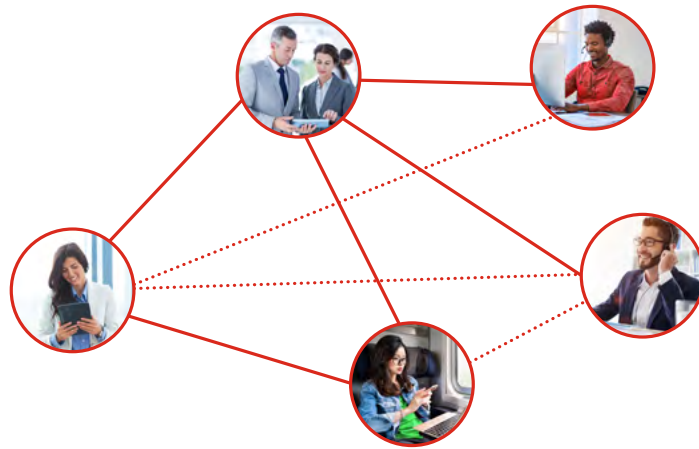
#### Gartner 1

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## II. The Challenge for Contact Centers

Contact centers are resource-intensive operations that require significant, ongoing investments in people, technology, and management.

Constant monitoring is a given. Changes, large and small alike, in customer demand, marketing strategies, competition, compliance issues (such as the May 2018 introduction of GDPR)—any of these can throw contact center operations out of balance, leading to subpar performance, higher-than-necessary costs, and significant issues with customer, agent, and manager satisfaction.

At the center of the contact center operating environment are the core capabilities for establishing and managing agent groupings, skill sets, call routing, links to databases, and more. These are the tools that control the distribution of contact center resources.

To optimize the performance of both the tools and the actual resources themselves, contact center managers have turned to a variety of prepackaged and homegrown point solutions (e.g., spreadsheets) to accomplish tasks such as evaluating agent performance, ensuring that compliance rules are followed, handling agent shift schedules, setting up overtime, providing coaching, etc.

### Where Existing Solutions Fall Short

As the challenge of delivering the best level of customer experience becomes more complex and resource-intensive, reliance on siloed, point capabilities is likely to fall short of expectations:

- In general, these tools are designed to accomplish a specific function (e.g., call recording, staff scheduling) as opposed to delivering both the required capability and the analytics needed to guide improvements in strategy.
- Because different tools may not work together, it becomes difficult to undertake a thorough quality assurance evaluation across multiple channels. For example, while many contact centers record calls for compliance, often they don't use these recordings to drive quality assurance because it's prohibitively time-consuming, cumbersome, and expensive.

1. 2017 Gartner Customer Experience in Marketing Survey  
 2. Accenture Global Consumer Pulse Survey (11th) 2018, <https://www.accenture.com/us-en/insight-digital-disconnect-customer-engagement>  
 3. Customer Experience Drives Revenue Growth, 2016: [https://go.forrester.com/blogs/16-06-21-customer\\_experience\\_drives\\_revenue\\_growth\\_2016/](https://go.forrester.com/blogs/16-06-21-customer_experience_drives_revenue_growth_2016/)  
 4. Customer experience and your bottom line, Avana and Sitecore, 2017, <https://www.avanade.com/-/media/asset/research/sitecore-customer-experiences-executive-summary.pdf>

**As customer experience strategies grow in importance and scale, at the same time becoming more omnichannel and more regulated, more organizations are turning to integrated workforce optimization (WFO) solutions.**

- Many tools are channel—specific, delaying the cross—channel monitoring needed to deploy holistic analytical tools to identify trends and test strategies.
- As point solutions, these capabilities are not easily adaptable to new requirements, such as GDPR privacy regulations.
- The reliance on older point solutions makes it more difficult to incorporate agents into the quality process—either by gaining insights from agents themselves or by creating a closed loop between the quality management process and agent learning.

### III. Six Ways WFO Solutions Support Superior Customer Experience Management

Superior customer experience management is ultimately all about putting the right resources in the right places at the right times on the right budget.

WFO solutions help contact center managers achieve this superior customer experience by delivering an integrated, holistic approach to customer experience—addressing performance across all channels and agent activities, automating processes, delivering advanced analytics, and addressing key compliance issues.

Let's look at six core capabilities you will find in today's WFO solutions:

#### 1. Call Recording / Speech Analytics



*Instead of manually searching for specific words, phrases, categories, or themes for compliance or quality assurance, speech analytics takes care of the searching and compiles the results*

Call recording has always been one of the first solutions to be deployed in a contact center, often to comply with early regulatory requirements. WFO solutions enhance and streamline call recording by integrating speech analytics:

- Instead of manually searching for specific words, phrases, categories, or themes for compliance or quality assurance, speech analytics takes care of the searching and compiles the results.
- Gain a deeper understanding of what is taking place during customer interactions, detect customer experience issues before they become problems, and even set up alerts based on the data being captured.

As the challenge of delivering the best level of customer experience becomes more complex and resource-intensive, reliance on siloed, point capabilities is likely to fall short of expectations due to:

- Lack of analytics
- Inability to do quality assurance
- Lack of cross-channel capabilities
- Hard to adapt to industry rules and regulations such as GDPR
- Difficult to include agents in the quality management process

The recording capabilities of today's WFO solutions are not just for voice—additionally, you can capture desktop actions and text interactions. They also provide extensive file tagging and archival capabilities that play a major role in supporting the data retrieval capabilities required by regulations such as GDPR and the Payment Card Industry Data Security Standard (PCI DSS).

## 2. Desktop / Process Analytics

Delivering a great customer experience is not just about the one-on-one interaction between an agent and a customer but also about all the other processes, such as updating CRM systems and consulting the company knowledge base, that agents must complete as part of their core daily activities.

In the past, organizations had little to no visibility into these activities. Now, WFO solutions address this significant gap, giving you tools to:

- Capture the data necessary to understand exactly how different applications and processes are being used.
- Analyze patterns in workflow and application usage.
- Map step by step how agents execute processes based on actual desktop activities or activity log files, and even creating process diagrams.

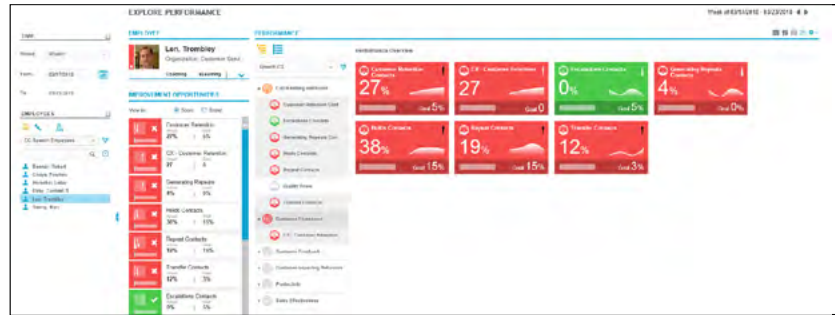
In addition to enhancing overall contact center performance, this capability can also be used for fraud detection (helping to alert managers when employees take actions outside their authority) and for compliance with PCI DSS and GDPR (pausing and resuming audio and screen recordings when confidential information is being provided).

## 3. Quality Management

Traditional quality management techniques in contact centers have relied on recording and scoring a sampling of voice calls and then requiring managers to manually follow up on the findings as appropriate. Nowadays, WFO solutions expand and automate the quality process across channels:

- Capture data on every interaction, including calls, chats, and desktop processes, instead of taking a sampling of calls.
- Pinpoint specific performance issues and analyze overall quality across channels based on metrics for business relevance, agent performance, and customer experience.
- Discover new ways to shift contact center resources to where they can deliver the greatest impact.
- Detect and address compliance issues before they result in penalties.
- Use the information gathered to provide a supportive environment that improves agent performance, agent satisfaction, and ultimately customer experience—including by automatically launching e-learning and coaching to address identified skills gaps.

**Many of the core capabilities of WFO solutions work together to streamline compliance with the European Union's GDPR, which became effective in May 2018.**



*Pinpoint specific performance issues and analyze overall quality across channels based on metrics for business relevance, agent performance, and customer experience.*

#### 4. Workforce Management (WFM)

An essential component of any effective contact center strategy is the ability to manage the actual resources—agents, agent skills, self—service tools, etc. With so many interactions occurring on so many different channels, achieving the right balance of resources across different functional areas is a complex undertaking.

Many contact centers make do with calendaring applications and shift schedules maintained on spreadsheets. The WFM module of today's WFO solutions take this to the next level, providing the tools to accurately plan, forecast, and schedule resources in complex omnichannel environments:

- Manage staff availability across transactions, channels, locations, etc., factoring in people's skills, proficiencies, and preferences, as well as work rules, service level objectives, and, of course, budgets.
- Make schedule changes “on the fly” when circumstances dictate.
- Gain greater visibility into how work is being done or the status of work items.
- Automate employee access to work schedules, including through mobile devices.
- Integrate data from other WFO modules (e.g., Performance Management, Desktop / Process Analytics) for a holistic look at workforce allocation and the overall customer experience.

#### 5. E—learning & Coaching

It's not unusual to see a significant investment in agent training during the initial new—hire / onboarding period and then little to nothing later. Unfortunately, that's a mistake. In rapidly evolving markets, when there are ongoing changes in products, processes, and regulations, maintaining employee skill levels is critical.

Integrated WFO solutions help address the challenge of skill advancement in busy contact center environments by tying coaching / e—learning together with scorecards and quality management applications. Now you can establish an automated training workflow, scheduling, delivering,

**Contact centers are resource-intensive operations that require significant, ongoing investments in people, technology, and management. A key factor in achieving positive customer experience outcomes is the ability to continuously optimize the contact center.**

and tracking coaching / e-learning based on individual quality management evaluation scores and key performance indicators (KPIs) and then distributing the training where it really matters—right to the agent desktop:

- Conduct timely, relevant training without the high costs and inconvenience of classroom sessions.
- Training can be assigned manually or automatically to individuals or groups based on scorecard results and quality monitoring performance evaluations.
- Supervisors and agents can leverage alerts to help ensure targeted training assignments are completed by due dates.
- Employees can also assign lessons to themselves to proactively improve their skills.

## 6. Performance Management

Contact centers generate a lot of information—the challenge is making sense of it all. WFO solutions help by capturing and aggregating data across multiple systems through a single, standardized framework and delivering the information to managers in intuitive, flexible dashboards:

- Align KPIs and agents to individual, group, department, and organizational objectives.
- Get visibility across KPIs, individual employees, teams, departments, etc.
- See at a glance what's working and what's not.
- Make corrections as needed based on actionable insights.
- See the big picture and then drill down to specific agents, interactions, screens, etc.
- Automatically trigger training and other processes.
- Communicate objectives across the organization.
- Maintain a continuously looping data-driven process for performance improvement.

## IV. WFO Supports GDPR Compliance



Many of the core capabilities of WFO solutions work together to deliver another immediate benefit: streamlining compliance with the European Union's GDPR, which became effective in May 2018.

GDPR is a landmark data privacy law and is likely the harbinger of more regulations to come in the U.S. and other countries.

It is important to note that while GDPR was enacted in Europe, it impacts ANY organization that has even a single European Union resident as a customer or employee (even if the individual is located in the U.S.).

# Failure to comply with GDPR requirements can result in fines of up to 4% of annual revenue or 20 million EUR, which ever is greater—in addition to devastating a company’s reputation and possible further regulatory and enforcement actions.

GDPR poses special challenges for contact center operations, given their extensive use of personal information and financial information as well as their recordings of phone calls, screen interactions, etc.—it’s all covered by GDPR.

Failure to comply with GDPR requirements can result in fines of up to 4% of annual revenue or 20 million EUR, which ever is greater—in addition to devastating a company’s reputation and possible further regulatory and enforcement actions. Gartner predicts that by the end of 2018, more than 50% of companies affected by GDPR will still NOT be in full compliance with its requirements.<sup>5</sup>

AT—A—GLANCE: How WFO Supports GDPR Compliance

	Contact Recording	Quality Management	Workforce Management	Speech Analytics	Desktop Analytics And Process	Customer Feedback	Encryption
Right of Access	✓	✓	✓	✓	✓		
Right to Lawful Processing of Personal Data	✓			✓			
Right of Rectification	✓	✓	✓	✓	✓	✓	
Right of Data Portability	✓			✓			
Right to Erasure	✓	✓	✓	✓	✓	✓	
Data Breach and Privacy by Design					✓		✓

## GDPR Protections

GDPR puts in place a wide range of protections on personal data:

- **Access:** Giving individuals access to any data on file about them, including data records, recordings, transcripts of recordings, screen captures, browsing history, surveys—virtually any data of any kind about an interaction is covered by GDPR.
- **Control:** Individuals can ask to have their data changed (the right of rectification), erased (the right to be forgotten), or transferred to another entity (data portability).
- **Consent:** Personal data can only be processed / recorded on a lawful basis, such as with the individual’s consent. If consent is the lawful basis upon which the data is captured, the consent must be explicitly given.
- **Design:** Organizations are required to encrypt data, provide notice of any breaches within 72 hours, and restrict the range of internal access to personal records.

5. Gartner Says Organizations Are Unprepared for the 2018 European Data Protection Regulation, <https://www.gartner.com/newsroom/id/3701117>



# WFO constitutes a key set of applications that organizations can rely on to help them comply with GDPR regulations.

## How WFO Supports GDPR Compliance

WFO streamlines and simplifies compliance and decreases exposure to penalties for noncompliance.

**Tagging and Retrieval:** Through extensive data tagging and retrieval capabilities for data records, recordings, and unstructured data, WFO constitutes a key set of applications that organizations can rely on to help them comply with GDPR regulations. WFO solutions make it easier to find, delete, and export customer data and track data across systems, addressing key GDPR requirements such as the right to access and the right to be forgotten. This can eliminate the need for other point solutions or expensive intermediate processing.

**Agent Performance:** WFO solutions facilitate the capturing and management of data on agent compliance with GDPR—and provide the basis for training if the agents are not complying.

**Encryption:** WFO uses encryption that protects data at the point of capture, in transit, and archival, complying with a key requirement for organizations to integrate privacy capabilities into their overall operations.

## V. The ROI of WFO

In addition to enhancing customer experience and streamlining compliance, both of which can have a substantial impact on ROI (e.g., through more sales or lower compliance costs), WFO can also produce hard-dollar savings in workforce utilization and managerial performance:

### Workforce Utilization



Agents are your single largest investment and consequently the area where today's WFO solutions can deliver substantial ROI. Easily and accurately compiling optimal staffing schedules based on available resources can result in the following:

- Lower overall hiring and staffing needs.
- Better visibility and management of projected growth.
- Lower average payroll cost per hour of handle time.
- More cost-effective staff blending (when and where appropriate).
- Less overtime through techniques such as annualized hours and overtime rosters (providing more flexibility while eliminating guesswork and potential overstaffing).

**By simplifying, streamlining, and automating so many management tasks, WFO solutions can significantly reduce the time and resources devoted to tasks such as forecasting / scheduling, managing shift requests, generating reports, etc.,**

- Improved agent satisfaction and reduced staff turnover by more easily accommodating shift and day—off preferences.
- Management Performance

By simplifying, streamlining, and automating so many management tasks, WFO solutions can significantly reduce the time and resources devoted to tasks such as forecasting / scheduling, managing shift requests, generating reports, etc., saving managerial resources and leaving more time for value—generating activities such as new service initiatives and improving agent performance.

WFO solutions deliver in real time the data that managers need to improve people and processes—critical in today's markets and a major advantage over older point solutions.

## VI. The Future of Customer Experience

As more and more business is conducted across diverse channels, the ability to deliver a compelling customer experience will remain a constant challenge.

Customer experience is far from a “set it and forget it” process. As technologies and markets evolve, so will the ways you interact with your customers. Putting in place the right tools to optimize your customer experience processes will repay the investment many times over.

And keep in mind...

### More Regulation

The alphabet soup of data privacy regulations—PCI DSS, GDPR, etc.—is just heating up. We are almost certainly at just the beginning stages of a wave of regulations that will require you to put in place new policies and procedures to protect privacy and deliver compliance. Already, banks and other asset managers have invested billions to comply with the 2018 implementation of the European Union's MiFID II (the second iteration of the Markets in Financial Instruments Directive), which, among many other things, requires brokers and investment managers to record all conversations related to deals and store them for a minimum of five years.

### More Analytics

The major trend in business process improvement can be summed up in a single word: analytics.

- Accurately measuring what's going on.
- Analyzing the data.
- Implementing process improvements.
- Measuring and analyzing again.

It's a never—ending process. WFO solutions are designed to deliver the information and analyses you need to make it happen.



## More Automation

No organization has unlimited resources for customer experience. That's why a major focus in the future will be the greater use of artificial intelligence and automation to deliver differentiating customer experiences more cost—effectively.

Using WFO solutions to provide the data and understanding of how processes can be streamlined is the critical first step.

## VII. Getting Started with WFO

While delivering the right customer experience is universally important, how each enterprise gets there is going to be very different, including in how they find the right way to integrate WFO capabilities.

Today's WFO solutions are highly modular, offering a wide range of capabilities. But implementing them incorrectly can be worse than not using them at all.

Which ones are right for you now? Which ones are better off being implemented in stages?

At Avaya, we often start by conducting a Discovery Workshop. Our customer experience experts meet with your key stakeholders, discuss your current capabilities and objectives, investigate your processes, and ultimately help you develop a roadmap that can take you from where you are today to where you want to be tomorrow.

Interested? To schedule a Discovery Workshop, please contact your Avaya Account Manager or Authorized Partner or visit us at [www.avaya.com](http://www.avaya.com).

