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AGENT DESKTOP OPTIMIZATION: HELP YOUR AGENTS HELP CUSTOMERS

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Aberdeen research shows that technology tools are among the top factors influencing agents' ability to meet and exceed customer expectations. Of all the tools they use, the agent desktop is arguably the most important. This report highlights the business value companies observe by optimizing this tool. It also reveals the key activities and technologies contact centers use to empower agents and help them succeed in creating happy customers.

Agent desktop optimization isn't just about managing agent productivity and performance. It has a direct impact on customer experiences.

The Business Value of Agent Desktop Optimization

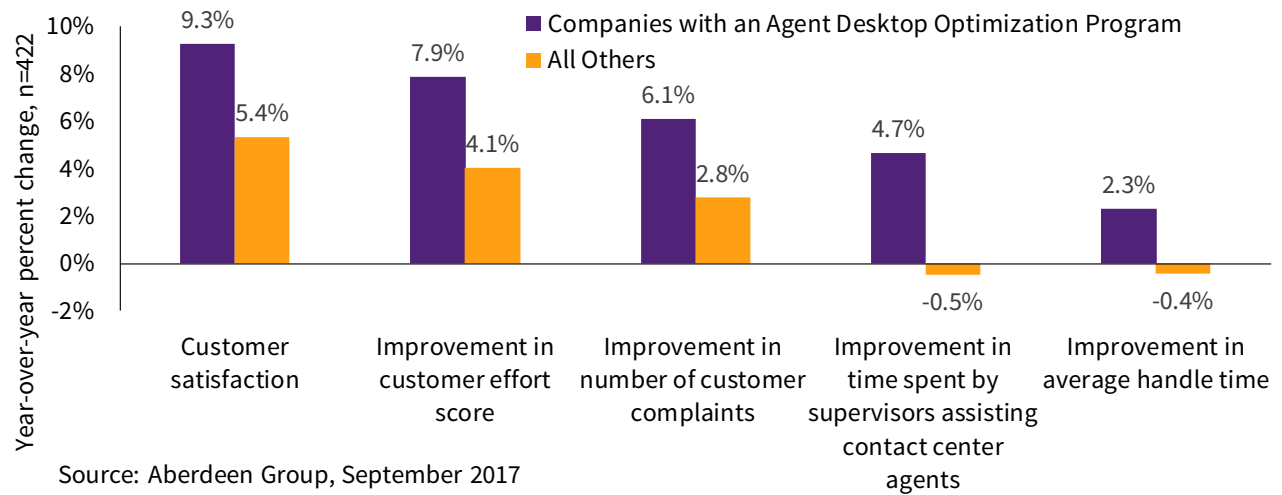
What makes the agent desktop so important? Aberdeen's May 2017 *Contact Center Workforce Optimization: Productive Agents, Happy Customers & Reduced Costs* study shows that improving the quality of customer interactions overtook improving agent productivity and performance as the top objective driving contact center workforce optimization (WFO) programs. (See sidebar for definition.) This means that contact centers are increasingly focused on how tactical activities – such as forecasting, scheduling, and performance management – influence customer experience outcomes.

It is therefore imperative that companies manage the top factors that will help maximize customer experience outcomes. Agents have a direct impact on this outcome, so it is vital for firms to empower them with the right information in an easy and timely fashion through the agent desktop. This refers to agent desktop optimization (ADO) programs. Figure 1 shows the year-over-year (YOY) gains enjoyed by companies with ADO programs, compared to those without them.

Definition: Contact Center Workforce Optimization (WFO)


For the purposes of this research, Aberdeen defines contact center WFO as an organizational program aimed at managing a broad scope of activities (e.g., scheduling, training, performance management) in relation to the contact center workforce.

Figure 1: Optimizing the Agent Desktop Helps Create Happy Customers



The role of agent-assisted service has been elevated to new heights over the past decade. Aberdeen’s June 2017 *The Intelligent Contact Center: Get Smarter to Drive Customer Satisfaction* study shows that 40% of contact centers currently use self-service, and 27% of firms consider incorporating it within their customer care channel mix. Companies use self-service to help customers address non-complex issues themselves – without the need to navigate an interactive voice response (IVR) system and explain their issue to an agent. In turn, agent-assisted conversations are increasingly used for more complex issues, and it’s vital that companies provide agents with the necessary tools and information to efficiently resolve these issues.

Figure 1 shows that **companies with an ADO program truly excel in helping agents help customers.** They improve (decrease) average handle times by 2.3%, compared to 0.4% worsening by All Others. They also improve (decrease) the number of customer complaints by 2.2 times more YOY, compared to All Others (6.1% vs. 2.8%). Achievements across these areas help reduce customer effort, which, in turn, increases customer satisfaction rates. In fact, companies with an ADO program improve customer satisfaction rates by 74% more annually, compared to those without one. In short, **ADO programs are closely linked with success in creating happy customers.**



Despite the growing importance of managing customer experiences as a WFO objective, companies must also excel in managing agent productivity and performance, as this is closely linked to serving customers effectively. Figure 1 shows that companies, with an ADO program, lead others in such efficiency gains. They improve (decrease) the time supervisors spend assisting agents by 4.7% YOY. In comparison, firms without an ADO program observe 0.5% worsening. This signals that ADO helps firms provide agents with easy access to the right information needed to do their jobs. As a result, less coaching and help is required from supervisors.

Three Pillars to Maximize Agent Productivity and Performance

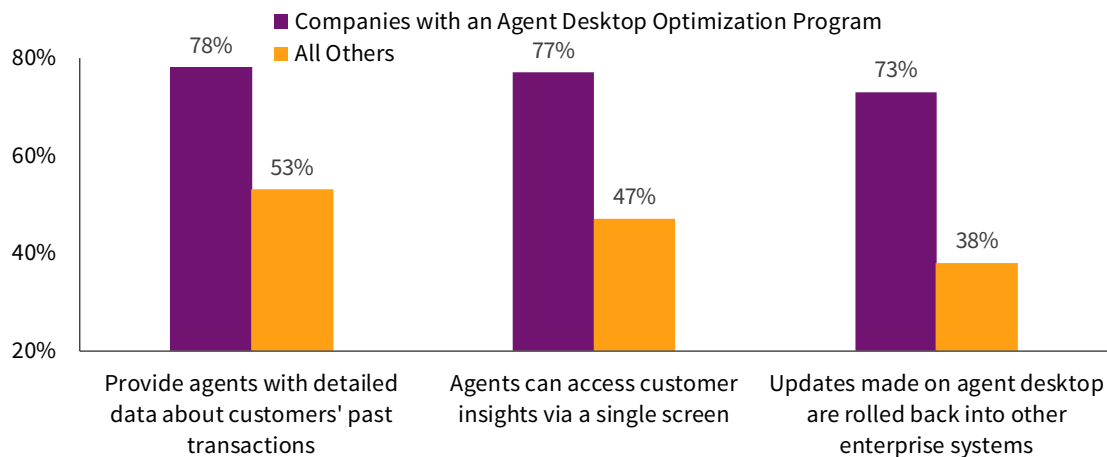
Aiming to provide agents with the necessary tools and information is not the same as actually doing it. Companies must implement certain initiatives to help agents help customers. Aberdeen determined three sets of key activities that companies with an ADO program carry out to accomplish this goal:

1. Help Agents Know the Customer

The first set of activities companies with an ADO program use is designed to better understand the customer. This includes the customer's product / service purchases, recent conversations, open support issues, etc. Enabled with these insights, agents can personalize the conversation to address the precise needs of each customer. Figure 2 (see next page) shows that ADO program users are 47% more likely to provide agents with detailed insights into customer data, compared to All Others (78% vs. 53%).

Don't ignore the agent experience; build and manage processes that allow agents to easily find customer insights they need to personalize conversations.

Figure 2: Provide Easy Access to a Single View of Customer Insights



Percent of respondents, n=422
Source: Aberdeen Group, September 2017

One of the challenges companies face when providing agents with a detailed view into customer interaction history, is that these insights might be captured and stored across numerous enterprise systems (e.g., CRM, ERP, automated call distribution). Lack of integration across these systems risks agents not having the full context of customer interactions that they need to help the customer. One of the ways companies resolve disparate views of customer data is by integrating the agent desktop with the enterprise systems storing relevant insights. Figure 2 shows that companies with an ADO program are 92% more likely to have this integration in place, compared to All Others (73% vs. 38%).

Findings from the [Contact Center Workforce Optimization](#) study shows that, on average, agents browse three different applications (e.g., internal knowledgebase, CRM, and billing management) to find the information necessary needed to address the unique issues of each client. This is largely a result of the lack of integration noted above. Companies challenged with such inefficient ways to access data, risk agents spending more time to find relevant insights to do their job. This, in turn, increases average handle times, worsens agent productivity and frustrates customers who wait longer for their issues to be resolved. ADO

On average, agents must browse three different applications to find relevant customer insights or knowledgebase articles to help customers.

program users alleviate these challenges by providing agents with access to relevant customer insights, via a single screen, on the agent desktop. They are 64% more likely to have this capability in place compared to All Others (77% vs. 47%).

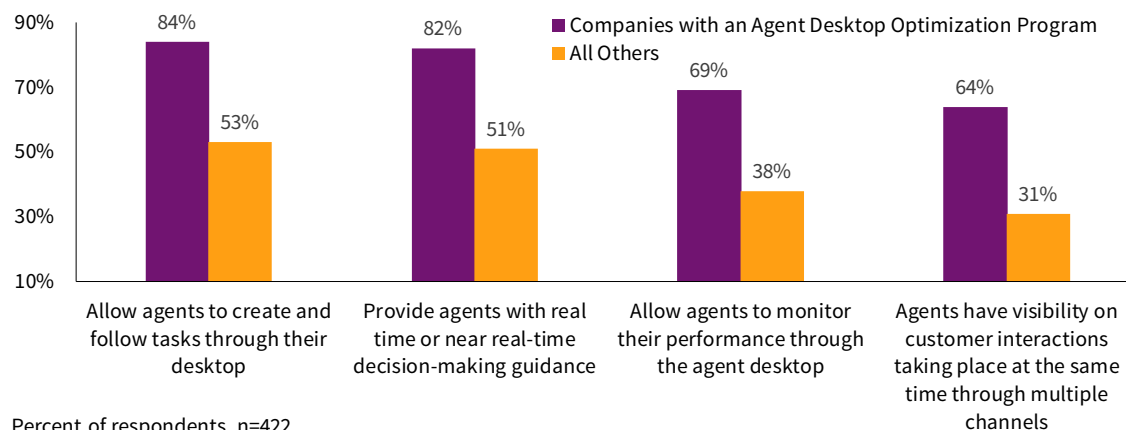
2. Support and Guide Your Agents

Savvy contact centers complement the above steps with activities designed to support agents when using customer insights. Specifically, they provide agents with dashboards through the agent desktop. These dashboards allow monitoring performance across key performance indicators, such as average handle time and customer satisfaction. Such visibility into performance through dashboards helps agents observe their performance in a timely fashion and make necessary adjustments, or seek guidance to attain their goals. Therefore, agents don't need to wait until a coaching, or training session, to learn their performance results and seek guidance to improve them. Providing agents with dashboards to monitor their performance also helps the business as it minimizes the risk of delivering poor customer experiences by addressing gaps in agent skills in a timely manner. Figure 3 shows that companies with an ADO program are 82% more likely than All Others to have this capability (69% vs. 38%).

Definition: Omni-channel

For the purposes of this research, Aberdeen defines 'omni-channel' as a capability that enables organizations to deliver consistent *and* personalized customer messages across multiple channels, such as phone, IVR, email, social media and live chat.

Figure 3: Enable Agents with the Right Tools for Issue Resolution



Percent of respondents, n=422

Source: Aberdeen Group, September 2017

ADO program users also provide agents with visibility, if customers use multiple channels concurrently. Weaved with the activities described under the first step, this helps agents better navigate the customer conversation. For example, knowing that a customer inquiring about a recent bill is currently logged into the self-service site, the agent can refer the client to relevant sections under the self-service site when answering questions about the bill. This helps minimize customer effort and deliver a true omni-channel experience (see sidebar on page 6).

ADO program users don't forget the importance of basic blocking and tackling activities when helping resolve customer issues. Earlier, we've seen that these firms achieve superior results in decreasing customer effort. One of the ways they accomplish this is by providing agents with task management capabilities. These allow agents to create and follow tasks through the agent desktop. Figure 3 shows that ADO program users are 58% more likely to have this capability, compared to All Others (84% vs. 53%).

Optimizing the agent desktop is more than just providing agents with the tools and information they need, and hoping they use them effectively to resolve customer issues. It includes monitoring agent activities (via the agent desktop) to provide guidance in real-time, or near real-time. This is important, as agents might struggle with a variety of issues such as finding relevant knowledgebase articles or finding an internal subject matter expert to help address a complex issue. Monitoring the agent desktop through desktop analytics allows supervisors to guide agents with next steps. This guidance can be provided through chat via the agent desktop or through voice via the agent headset.

Providing real-time, or near real-time guidance helps boost agent productivity and reduce the risk of frustrating customers due to challenges agents might face during an interaction. Data shows that companies with an ADO program are 61% more likely to provide such guidance to agents, compared to All Others (82% vs. 51%).

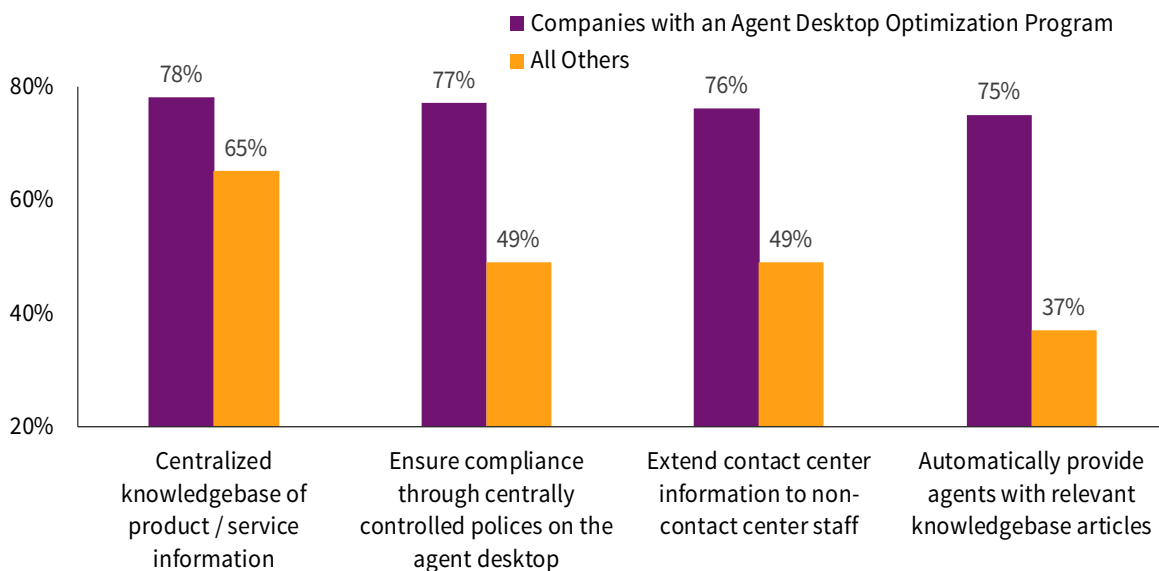
3. Put Resolution at the Fingertips of your Agents

The third set of activities that companies with an ADO program use are designed to provide agents with easy access to content needed to resolve customer issues. They differ from

Savvy firms are proactive in helping agents help customers. They regularly monitor the agent desktop to provide real-time guidance to agents.

the first set of activities, in that the first set of them (see Figure 2) are designed to provide agents with detailed customer insights. Agents must know who the customer is, as well as their interaction history, to resolve issues. This third set of activities (Figure 4) builds on this by allowing agents to easily find the content to address client issues. To this point, this figure shows that companies with an ADO program are 17% more likely to build and manage a centralized knowledgebase, compared to All Others (78% vs. 65%).

Figure 4: Build and Manage a Best-in-Class Knowledgebase



Percent of respondents, n=422 Source: Aberdeen Group, September 2017

A knowledgebase is a dynamic repository of articles agents can use to resolve customer issues. It's important for companies to regularly gauge the effectiveness of articles in a knowledgebase by observing their impact on first contact resolution rates. If companies determine that a knowledgebase story is not helping resolve customer issues, they must update the article, or replace it with a more accurate one to help agents with more relevant insights.

Earlier, we noted that agents spend unnecessary time seeking insights to do their job. Part of this time is spent looking for relevant knowledgebase articles. Data shows that on average, agents spend 16% of their time seeking relevant content (e.g.,

On average, agents must browse three different applications to find relevant customer insights or knowledgebase articles to help customers.

knowledgebase articles). Let's assume that a contact center with 200 seats incurs \$50,000 in average fully-loaded cost per agent. The 16% of agent time spent looking for content would equate to \$1.6 million in unnecessary labor costs *each year* (\$50,000 times 200 times 16%). Considering the customers that the business risks losing due to inefficient service delivery, the financial impact of poor information management exceeds \$1.6 million annually.

One of the ways companies help agents find relevant knowledgebase articles, is by integrating enterprise search within the agent desktop. This technology allows agents to search across the knowledgebase through keywords and find relevant articles to address customer needs. It also makes it easier to find data stored across enterprise systems such as billing management. Data shows that contact centers using enterprise search, achieve 45% greater annual improvement in agent productivity, compared to firms not using enterprise search (11.6% vs. 8.0%).

Another way companies address the challenge of finding relevant knowledgebase articles, is by automatically providing agents with suggested articles through the agent desktop. This is done in numerous ways. For example, companies can automate the analysis of the information customers provide within the IVR on the nature of their issue. Through proper workflows, the company would then display the relevant knowledgebase article on the agent desktop when the customer is connected to the agent. Automatically providing agents with relevant content can also be done by using text analytics to analyze agent notes on the nature of the customer's issue. Detecting the word 'broken screen,' for example, would help automatically display the proper article on the agent desktop. Figure 4 (previous page) shows that companies with an ADO program are twice as likely to automatically provide agents with relevant knowledgebase articles, compared to All Others (75% vs. 37%).

Compliance is another aspect of agents' jobs – especially those working at firms operating across heavily regulated industries such as financial services, insurance and healthcare. For example, agents must abide by strict regulations when taking customer credit information for payments over the phone. Companies with an ADO program understand the risks of non-compliance, and have established processes to help agents

Companies with an ADO program are 57% more likely to establish processes that allow monitoring and managing compliance through the agent desktop.

complying with internal and external requirements. They monitor agent activities through the agent desktop through desktop analytics and warn agents through screen pops when detecting non-compliant activities. They can also record agent screens to be used in future training and as evidence in potential litigations.

Technology Plays a Vital Role in Managing Agent Experiences

We noted numerous technologies that companies use to implement the three sets of key capabilities discussed on the previous pages. Table 1 shows the adoption of each of these technologies by companies with an ADO program and those without one. The stark contrast in adoption rates is telling. It signals that the use of these technologies is an integral element to optimizing the agent desktop.

Table 1: Use Technology to Maximize Returns from Agent Desktop Optimization Programs

Technology Adoption Rate (n=422)	Companies with an Agent Desktop Optimization Program	All Others
Desktop analytics	81%	31%
Screen capture and sharing	72%	30%
CRM	71%	39%
Single sign-on to multiple applications from agent desktop	69%	27%
Database management	67%	28%
Contact center and CRM integration	66%	22%
Unified communications	65%	24%
Co-browsing	64%	26%
Enterprise social collaboration tools	59%	20%
Enterprise search	57%	21%

Source: Aberdeen Group, September 2017

The adoption of CRM systems and the integration between the contact center and CRM, helps firms with the first set of capabilities – knowing the customer. They provide insight into the historical interactions with buyers. Database management tools

help organizations integrate data – captured across disparate systems – and make it accessible through a unified agent desktop. (This provides a single view of customer insights.)


Social collaboration tools, such as internal online communities, help agents find internal subject matter experts to ask questions and receive help in addressing customer issues that might require unique expertise – one that already exists in the business. Unified communications refer to the use of tools such as instant messaging and video collaboration that agents can use to communicate with one another, as well as their supervisors and colleagues. They improve agent productivity (by reducing inefficiencies in internal communications) and help agents focus on their job of serving customers. Collectively, these activities align with executing the activities listed under the second set of key capabilities, which involves guiding and supporting agents.

Desktop analytics is among the technologies that help companies guide and support agents. It does so by monitoring and analyzing agent behavior through the agent desktop and determining if agents must be trained in certain aspects of technology usage. It also helps with the third set of key activities: helping agents with easy access to insights to resolve client issues. Other tools useful in this area include enterprise search and co-browsing. The former's role was explained earlier. The latter refers to agents co-navigating the customer's screen and guiding the customer to resolution.

Recommendations

Agent desktop plays a critical role in impacting contact center success. As buyers increasingly prefer using self-service to address simple issues, they expect companies to deliver more efficient service through agent-assisted conversations. This requires giving agents the tools and information they need to manage customer conversations. Findings revealed in this report indicate that companies are falling behind in this area. This is evidenced by 16% of agent time spent looking for insights, and agents needing to use an average of three different applications to find content they need to help clients.

Contact centers have a wide set of technologies available to help agents succeed in their role. Consider which technologies are right for your company by observing the current challenges agents face when managing customer conversations.



On the other hand, companies with an ADO program reduce average handle times, decrease customer complaints, improve customer satisfaction rates and even cut down reliance on supervisor time spent assisting agents. We recommend that companies follow the lead of these savvy organizations to enjoy similar results. This means adopting these activities:

- ▶ Help agents know the customer
- ▶ Support and guide your agents
- ▶ Put resolution at the fingertips of your agents
- ▶ Use supporting technologies, such as unified agent desktop, enterprise search and desktop analytics, to streamline executing the above activities

Related Research

Agent Experience Management: Customer Experience Begins with Your Agents; September 2017


Speech Analytics: Make the Most Out of Voice Conversations; August 2017

The Intelligent Contact Center: Get Smarter to Drive Customer Satisfaction; June 2017

Contact Center Workforce Optimization: Productive Agents, Happy Customers & Reduced Costs; May 2017

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