CONTACTBABEL

The Inner Circle Guide to Agent Engagement & Empowerment

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The Inner Circle Guide to Agent Engagement & Empowerment (UK version)

Speak your customer's language.

3 critical steps to digital fluency

Does your system drive seamless omnichannel experiences customers expect? These digital fluent customers have high expectations and are the least loyal of all groups. They move on quickly unless you do these things:

one

Get personal.

Customers expect you to know them after one interaction—or at least know where they are in their journeys. If they have to repeat themselves, you lose their trust.

two

Go faster.

Not getting fast, convenient service is a top reason next-gen customers go to a competitor. Your speedy, efficient service sets you apart from your competition.

three

Be seamless.

Every customer interaction, whether it's through the IVR, chatbot online, social channel, or app, better be smooth all the time. You don't always get a second chance to prove yourself.

Great CX is the key to retaining digital-fluent customers who leave the moment their expectations aren't met.

Get NICE CXone: the next-gen cloud platform that's proven, reliable, and scalable.

Ready to deliver exceptional digital and voice experiences?

Watch the CXone demo.

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Put the experience first. Build relationships to last

NICE CXone is a worldwide leader in AI-powered self-service and agent-assisted CX software for the contact centre – and beyond. Imagine the possibilities when your customers are effortlessly guided to quickly resolve their needs directly on your digital properties or matched with a well-prepared agent—every time and on every channel. Plus, with predictive analytics and embedded artificial intelligence (AI), your team can resolve issues faster, personalise each experience – and forge deeper loyalty with each customer.

About NICE CXone

With NICE, it's never been easier for organisations of all sizes around the globe to create extraordinary customer experiences while meeting key business metrics. Featuring the world's #1 cloud native customer experience platform, CXone, NICE is a worldwide leader in AI-powered self-service and agent-assisted CX software for the contact centre – and beyond. Over 25,000 organisations in more than 150 countries, including over 85 of the Fortune 100 companies, partner with NICE to transform—and elevate—every customer interaction.

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INTRODUCTION AND METHODOLOGY

"The Inner Circle Guide to Agent Engagement & Empowerment" is one of the Inner Circle series of ContactBabel reports.

Other subjects include:

- AI, Chatbots & Machine Learning
- Cloud-based Contact Centres
- Customer Engagement & Personalisation
- Customer Interaction Analytics
- First-Contact Resolution
- Fraud Reduction and PCI DSS Compliance
- Omnichannel
- Outbound & Call Blending
- Remote Working
- Self-Service
- Video & Next-Generation Customer Contact
- Voice of the Customer
- Workforce Optimisation.

They can be downloaded free of charge from here.

The Inner Circle Guides are a series of analyst reports investigating key customer contact solutions and business issues. The Guides aim to give a detailed and definitive view of the reality of the implementing and using technologies, how best to address these issues, and a view on what the future holds.

As well as explaining these solutions to the readers, we have also asked the potential users of these solutions whether they have any questions or comments, and we have selected several of the most popular to ask to the report's sponsor. The answers to these are distributed throughout the report and give interesting insight into real-life issues.

Statistics within this report refer to the UK industry, unless stated otherwise. There is a version of this report available for download from www.contactbabel.com with equivalent US statistics.

"Small" contact centres are defined in the report as having 50 or fewer agent positions; "Medium" 51-200 agent positions; and "Large" 200+ agent positions.

WHY YOU SHOULD CARE ABOUT AGENT ENGAGEMENT & EMPOWERMENT

Engagement is about giving agents the environment, culture and systems to reach their potential, encouraging them to care about their customers and ultimately, the aims of the organisation in which they work.

Empowerment implies trust in these agents, and an acceptance that some of the tight control that has been a feature of traditional contact centres will be lost. Empowerment requires a cultural shift, and also providing agents with the tools, skills and knowledge to do their best job.

Engaged agents mean happier customers which mean success for the organisation.

Empowering agents can improve first-contact resolution, which our research shows is the key factor driving customer experience and satisfaction. It also helps to keep agents engaged with their work and to feel proud of the job that they're doing.

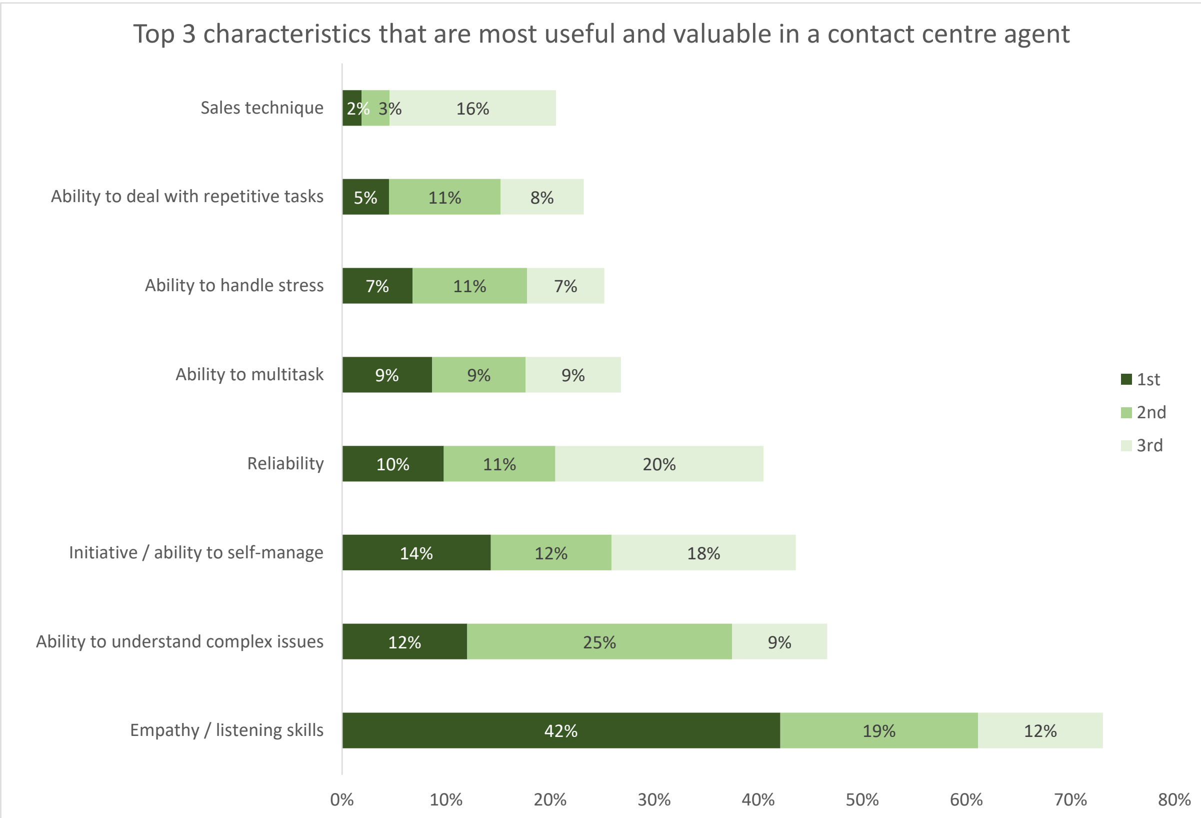
Of course, any investments or changes to processes to improve agent engagement and empowerment also have to work for the business. The following section looks at how agent performance can be improved, and links this to engagement and empowerment.

Respondents to a survey of more than 200 UK businesses were asked to rate the attributes that they believed were most useful and valuable in contact centre agents.

By far the most important factor was empathy – the ability to listen, understand and help customers – which was placed in no.1 position by 42% of respondents. Of course, empathy is only really useful when the supporting systems and processes allow and empower the agent to handle the interaction as they need to: there is no use in valuing empathy in an agent if they are not permitted to spend the time required to fulfil the customer's request, or the systems prevent them from achieving their goal. This report looks later at how to train and support agents to be more empathetic with customers.

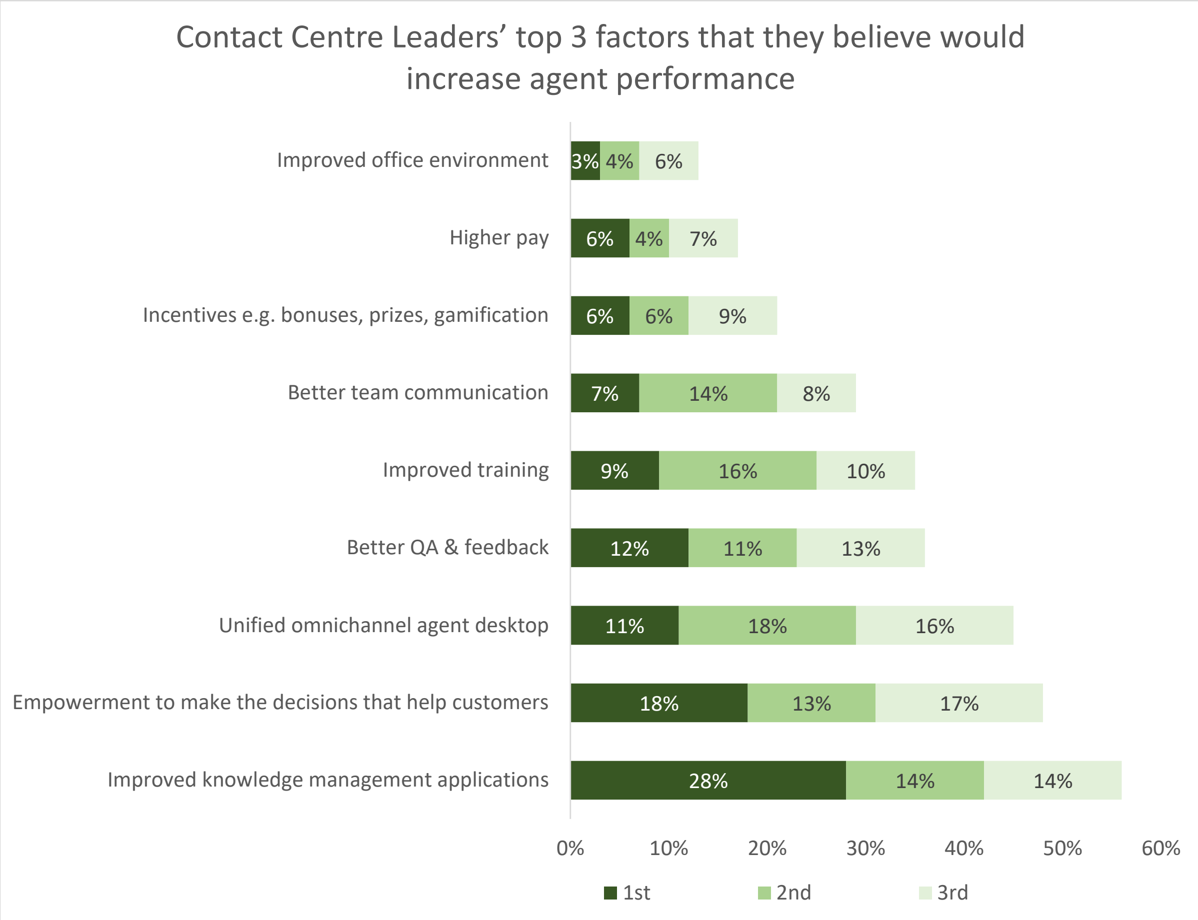
An ability to understand complex issues is also very valued, and will probably increase in importance as self-service handles more of the straightforward customer requests, leaving more complex and tricky work for human agents. Initiative and self-management is also seen as vital, and is of particular value in remote working environments where self-starting is an asset, and where outside help may be more difficult to access.

Figure 1: Top 3 characteristics that are most useful and valuable in a contact centre agent



Survey respondents were then presented with a list of factors that could improve agent performance and were asked to list their top three.

Figure 2: Contact Centre Leaders' top 3 factors that they believe would increase agent performance



Empowering agents to make decisions that help customers – which increases first-contact resolution rates – was an important factor in increasing agent performance. Survey respondents also stated that this would improve agent morale, so contact centres should focus upon the tools, processes and culture that supports agent empowerment. Improved knowledge management applications – the most popular top 3 factor – help with this, as they attempt to provide the agent with the information required to solve the customer's request while on the call, rather than requiring call transfers or callbacks. These are discussed later in this report.

A unified omnichannel agent desktop, providing agents with all of the information that they require on a single screen, also empowers agents and help solve the customer's issue first-time. Improved training was ranked in the top 3 by 35% of respondents.

Higher pay, despite being viewed as a major (if short-term) boost to morale, was not seen as an effective way to increase performance: keeping the same staff, technology and processes while paying agents more won't make any major difference to performance. Incentives were also viewed as improving morale rather than performance, although they are useful in particularly high attrition environments such as many of the largest contact centres and those running outsourcing operations.

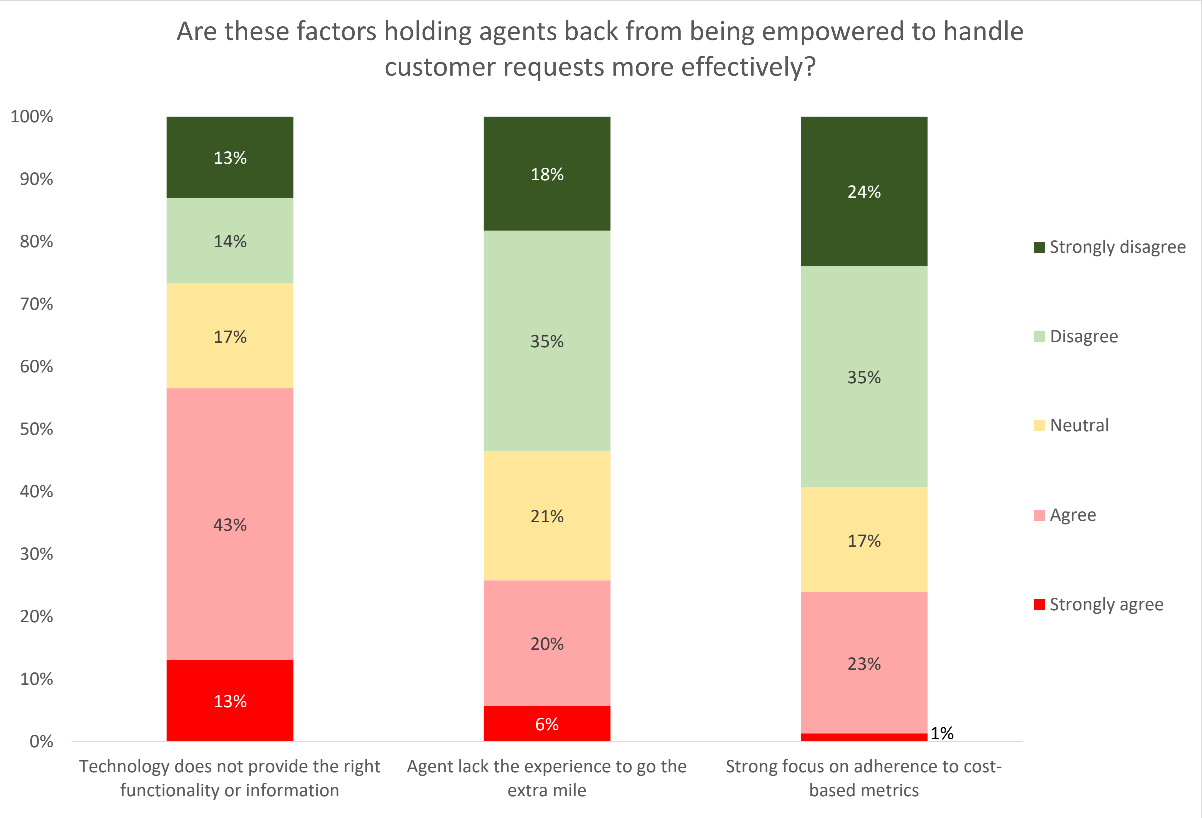
AGENT EMPOWERMENT

Being seen as key to both morale and performance, agent empowerment – the ability to make the decisions and carry out the actions that would actually help customers – requires the business to trust the agent to do the job to the best of their ability, supporting them through culture, process and technology as needed, and is closely linked with first-contact resolution, which is key to customer satisfaction.

By far the most important factor restraining agent empowerment is that technology does not deliver the required functionality or information, preventing even the most capable and empathetic agent from reaching their potential. Some of the solutions that can deliver this functionality are investigated later in this report.

26% of survey respondents agreed that some agents lacked experience and 24% blamed the contact centre's internal focus on hitting metrics such as call duration and throughput, but sub-optimal technology is certainly seen as the major culprit.

Figure 3: Are these factors holding agents back from being empowered to handle customer requests more effectively?



So how can agents become empowered? A few elements are:

- System support to answer any query, with access to the customer's history across every channel
- Desktop applications that provide all of the relevant information in one place, without requiring agents to hunt it down
- Intelligent support to suggest answers to agents, and make sure that they comply with regulations and achieve the quality controls set by the business
- Recurrent queries are identified and answers disseminated via knowledge base / alerts
- Skills and capabilities, via ongoing training
- Trust and culture from senior management, including giving agents the time they need to handle the query without excessive pressure to meet internal metrics at the expense of solving the customer's issue.

These factors, along with others, are looked at in-depth later in this report.

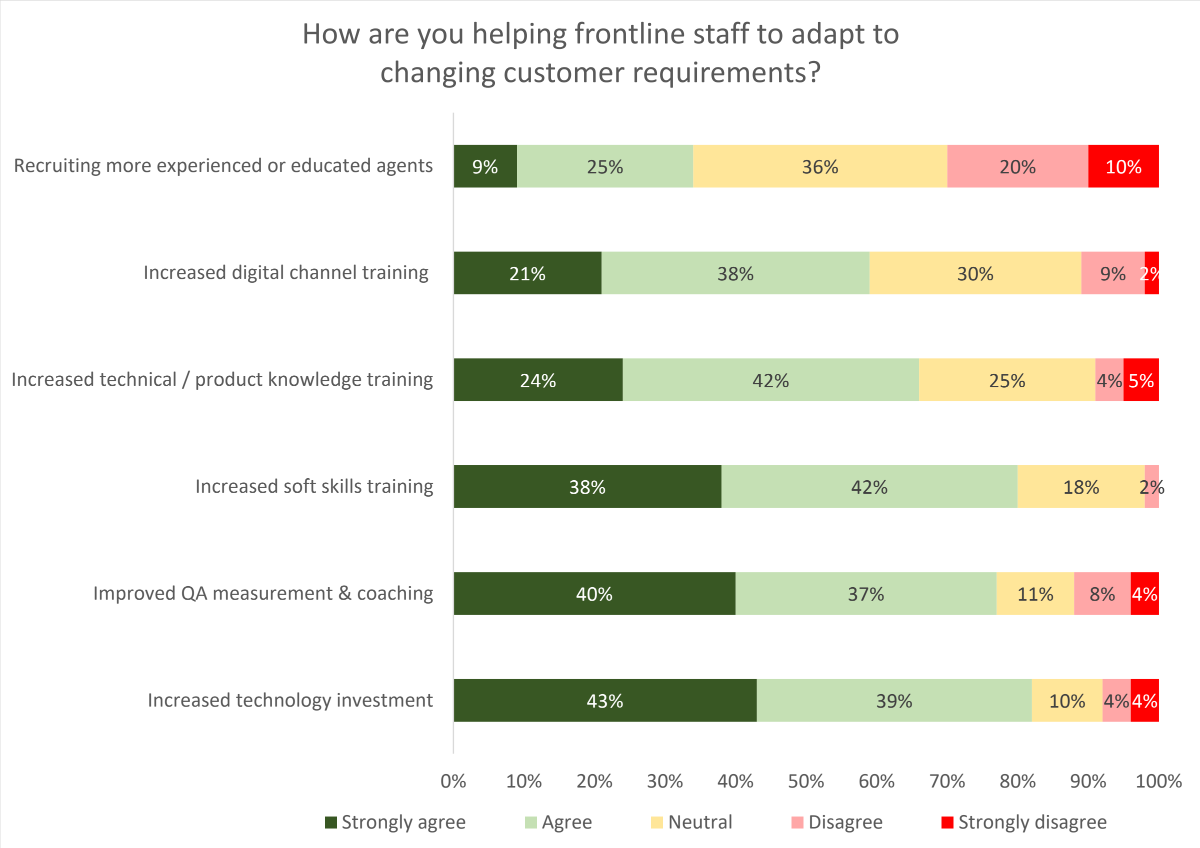
END-USER QUESTION #1: EMPOWERING AGENTS TO HANDLE CUSTOMERS AS THEY THINK BEST COULD HAVE A NEGATIVE IMPACT ON OUR KPIS. HOW DO WE MANAGE THIS?

You can achieve your KPI goals (CSAT, AHT, sales quota, etc.) AND empower agents to be their very best while improving customer engagement through advanced contact centre technology (e.g. AI-powered routing and real-time guidance) tailored to your business goals.

While KPIs are critical to success and are what drive down cost and increase revenue, ultimately all companies are in business for their customers. KPIs should always be used as a guide for how to handle customers, but those indicators will look different for every company depending on the market they are serving. If a company is only driven by KPIs, they will not have good company morale or engaged agents. Supervisors will definitely want to target KPIs and track to them, while at the same time assess the bigger picture of overall customer satisfaction along with agents meeting defined metrics.

Contact centre decision-makers were asked how they are helping their agents adapt to changing requirements, whether through recruitment, training or technology.

Figure 4: How are you helping frontline staff to adapt to changing customer requirements?



Only 34% of respondents are actively recruiting more experienced and educated agents to handle changing customer requirements, which implies that the typical contact centre strategy focuses upon improving the skills of existing agents, as well as any supporting technology and processes.

An increase in training is generally seen as one of the keys to increasing agent performance, and the majority of contact centres state that they are doing this, especially for soft skills and to a slightly lesser extent, technical and product knowledge. There seems to be less focus on training agents to handle digital enquiries, despite the general acceptance that the growth in digital channels is driving contact centre strategy. As digital channels have become more important, the survey shows an increase in this type of training compared to in other years.

The majority of contact centres acknowledge the need to improve quality measurement, which then leads to more targeted and effective coaching.

There was a general feeling from the contact centre decision-makers interviewed for this survey that suboptimal contact centre performance can usually be attributed to processes and especially technology, rather than the calibre of their agents.

While this shows an admirable confidence in their agents' current capability, contact centre leaders themselves say that increasing training is one of the most important methods of improving agent effectiveness, and the great majority of them state that they are increasing the amount of training and coaching – for both hard and soft skills – in order to keep up with the changing nature of the job and the growing expectations of customers.

Decision-makers see technology as being a crucial part of this (particularly knowledge management tools), not for its own sake, but as a way to inform and empower agents to carry out their work more effectively. Unlike the traditional call centre, where cost and efficiency were priorities, most technology solutions now being implemented aim to help the agent deliver a higher level of customer experience. Technology in itself can't do this: it must be aligned with a culture of agent empowerment and learning in order to raise and maintain the overall quality of customer interactions.

Contact centre leaders view this investment in technology to be an important but not the only method of helping frontline staff adapt to changing customer requirements, with the unified omnichannel desktop being seen as one of the most important solutions enabling and empowering agents to deliver high quality customer service.

It should be noted that most agents are already running close to capacity – time spent idle is usually under 10% for most operations – and that call lengths are increasing as work becomes more complex. Getting agents to work 'harder' (i.e. a greater interaction throughput per hour) is counter-productive to quality, customer outcomes and agent engagement: agents need to be supported to work smarter and become more aligned with the contact centre's and wider business's strategy.

AGENT ENGAGEMENT & EMPOWERMENT TECHNIQUES

Although it's an important factor, there's more to improving agent engagement and empowerment than implementing new technology solutions. This section looks at some processes and cultural changes that can assist businesses:

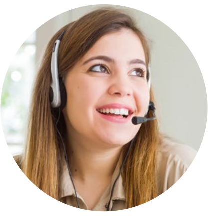
- Call and digital blending
- Voice of the Employee programmes
- Aligning agent behaviour and business strategy
- Supporting agent empowerment
- Agent rewards and recognition
- Remote working
- Coaching and empathy training.

Delivering on customer expectations begins with empowered agents

Agents are the beating heart of customer experience. They are the front line to customers throughout their full journey, and handle increasingly complex interactions, remotely, across multiple channels.

According to ContactBabel, *"The digitally transformed contact centre requires far more from [agents], and the skills and capabilities they need are only going to increase."* But agents lack the necessary technology and training[2] to deliver on customer expectations for quick, effortless, and personalised experience.

The right tools can help empower agents in this evolved role:



The empowered agent toolkit

An easy-to-use knowledge base puts answers in one place, so agents spend less time searching and more time supporting

AI-powered guidance on changes that impact satisfaction in the most critical moment develops and reinforces agent soft skills and improves CX

Agent-invoked robotic process automation automates routine tasks keeping them focused on helping customers, their no. 1 motivation for becoming agents

Unified all-in-one desktop lets agents handle multiple interactions without switching to and from applications, improving productivity

Integrated customer data keeps agents from asking questions they should already know the answers to

Automated and embedded bite-size training brings the classroom to the agent, increasing productivity, engagement, and retention

Dashboard of real-time performance lets agents see their impact on business outcome for increased engagement

[2]ICMI: State of Agent Experience and Engagement Survey (2019)

Call blending is an element of outbound calling which has had to fight against the conventional wisdom of the traditional contact centre industry, which implies that the more one can segregate the contact centre into a series of production lines, the better-run the operation will be.

Call blending gives the ability to deliver both inbound and outbound calls seamlessly to the agent, regulating outbound call volume based on inbound traffic. When inbound traffic is low, outbound calls are automatically generated for a specified campaign. When inbound traffic picks up, the dialler dynamically slows the number of outgoing calls to meet the inbound service level. Results can include increased agent productivity, streamlined staffing, and improved customer service. However, this process needs to be understood and managed carefully, as not all agents are adept at dealing with both inbound and outbound calls.

Past ContactBabel research has shown that the attrition rate in contact centres using formal blending is somewhat lower than in those that do not, as perhaps the variety of work may have a positive impact. Those respondents reporting formalised blending had an annual agent attrition rate of 16%, against 22% for those with dedicated inbound/outbound staff, and 32% for those employing an ad-hoc approach.

Of course, there are other variables at play that affect attrition, such as contact centre size, location, salary, working conditions and type of work, but the use of blending as an antidote for attrition and agent disengagement should be considered.

Digital / Voice Blending

There is no general agreement within the industry on how best to deal with digital channels, although there are genuine reasons to encourage blending. On one side, there is a case made that letting agents answer email and web chat makes the job more interesting for them, lowering attrition and improving skills. The other side to this says that the skills required by digital agents are different from voice agents, and that it is difficult to find the agents to do both jobs. Both sides make sense logically, and historically, of those contact centres which use voice/digital blending, only around 1 in 5 have experienced problems finding the right staff for these types of role, a figure that decreased each year that it was surveyed.

The great majority of survey respondents allow at least some of their agents to carry out both email/web chat and telephony. However, digital customer contact requires certain skills, including grammar and punctuation, which not every agent has, even with assistance from templates.

On average, 72% of agents in a blended multichannel environment are allowed to do both email and voice work, a figure which had been growing year-on-year, but which has steadied recently.

Those in small and medium operations are much more likely to use the same agents to handle email and telephony, probably because there is not the option to have the specialised teams found in large contact centres, which are much more likely to have a dedicated group handling email.

Simply because a contact centre uses the same agents for email and voice does not mean that all operations use the same level of multimedia blending. For some operations, multimedia blending is a strategic decision which has been invested in with the right levels of technology and training being provided. For others, it is a necessity, with agents encouraged to answer emails in slack call times. Small and medium operations – which in the past may not have had sufficient email volumes or the investment available to formalise the blending by forming a universal queue to deal with all types of interaction – are now as likely to use a universal queue / omnichannel hub as an ad hoc method. Many larger contact centres prefer to use dedicated digital groups.

However, the preference of many larger contact centres to form specialised digital groups may not provide the same levels of service. Previous years' data indicated a formalised blending environment, such as a universal queue / omnichannel hub, has a beneficial effect on email response times. Respondents using a formal blended environment reported that twice as many emails were successfully handled within an hour, although the proportion being dealt with in the same working day were fairly similar, regardless of whether formal blending, ad-hoc distribution of work, or dedicated email teams were used.

More information on running an omnichannel contact centre can be found in the "Omnichannel Hub" section later in this report.

END-USER QUESTION #2: CAN TECHNOLOGY MAKE THE WORKPLACE MORE APPEALING AND INTERESTING WITHOUT DAMAGING PERFORMANCE?

Gamification is a great way to make the workplace more appealing and interesting without damaging performance. With gamification, agents, supervisors, and teams can challenge each other. These challenges allow winners to earn coins that can be used to purchase items from an internal store. This store can include items of monetary value or items such as a close parking spot, company swag, or gift cards. While not always the case, prizes and cash rewards can be a great way to make the job of a contact centre agent more appealing.

VOICE OF THE EMPLOYEE PROGRAMMES

Voice of the employee (VoE) programmes are part of the workforce engagement management suite, aiming to understand how employees feel about their work and the organisation with the end goal to understand and improve outcomes for employees and the business. They can be used alongside VoC programmes to optimise the wider customer experience through improving employee engagement.

Some of the purposes of VoE include:

- improving employee performance and retention
- identify areas of underperformance in the organisation
- understanding and addressing the causes of boredom and burnout in front-line employees
- improving employee engagement and motivation, and aligning them with business strategy and culture
- as happy and engaged employees directly affect performance and customer experience, making the workplace and culture more pleasant will benefit everybody.

VoE programs can survey employees through tailored questions in order to gather insight about current levels of engagement by role, team, department, etc. Not only do front-line employees appreciate being listened to, but to be able to see any changes and improvements made as a result of their comments is very motivating. Employees can also be asked to give feedback through less formal channels, for example through suggestion boxes, open-door policies or supervisor meetings.

Employees are also able to add to the VoC programme through identifying particular customer patterns such as frequently asked questions or escalations, or through identifying technological or process barriers to service, making them feel an important part of the business as well as improving the customer experience.

Team and individual development plans can then be published, progress tracked and results shared. VoE survey findings can provide insight to other parts of the WFO suite (e.g. coaching/eLearning, and also gamification and performance), and also be connected to other metrics including absence, attrition and customer-focused scores, as well as feeding into the VoC programme.

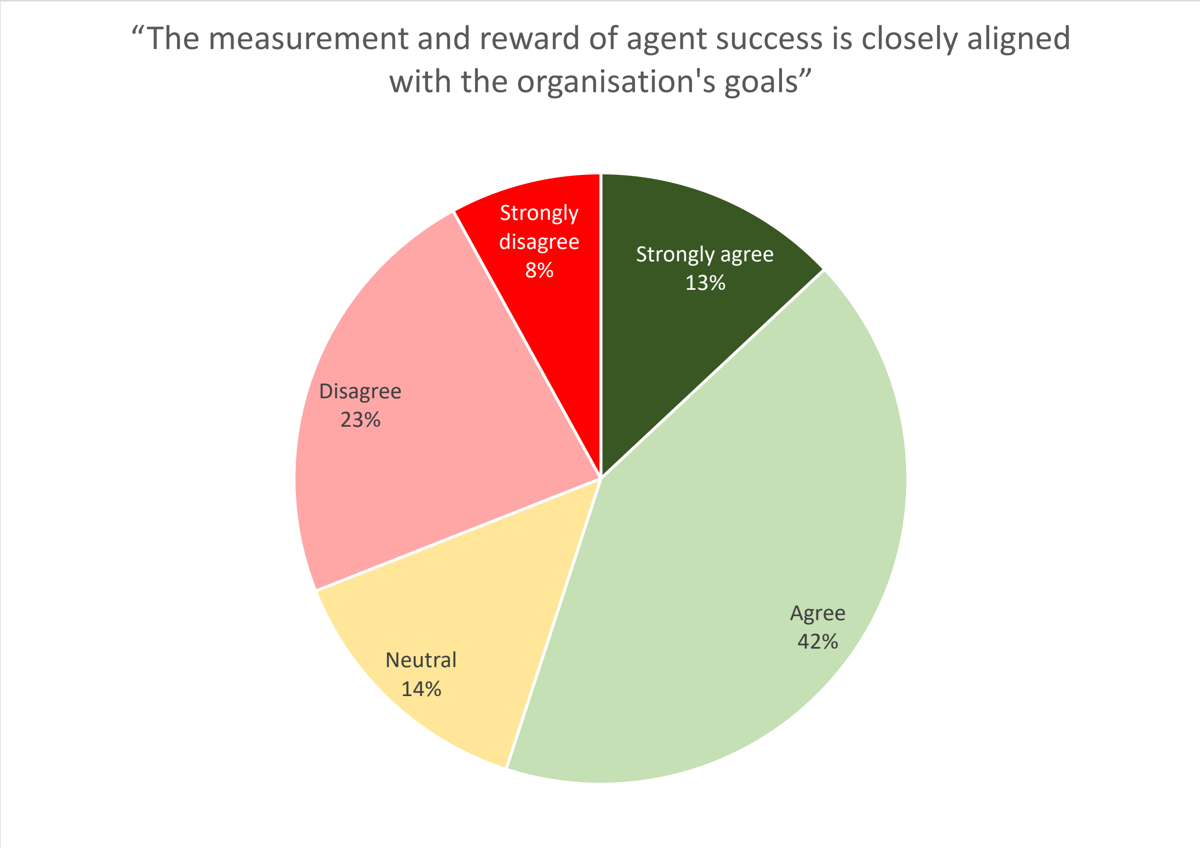
VoE helps organisations understand what their best-performing employees are thinking and engage with them to keep them loyal. It is important for any VoE programme to be set up so as to be able to release actionable insight: not just answers to questions such as 'How engaged with the business are you?', but also **why** this is, how it can be improved and what effect on the business will this have. VoE in the contact centre should answer questions around whether agents have all the tools they need to deliver a successful customer experience and whether they are encouraged and empowered to own the customer's issue or feel as though they are managed and judged solely by internal metrics.

Many contact centre employees are finding that the calls they are now handling are becoming increasingly complex, as many of the simplest interactions are being resolved through self-service. Where support systems and training have not been upgraded accordingly, this can lead to stress and demotivation as not been able to help customers effectively is a very negative experience. This issue is only likely to get larger over time, particularly as customer expectations are always rising.

Successful VoE is a long-term, ongoing project rather than simply being a snapshot of a moment in time, and it is important to create buy-in at the top of the organisation by sharing the goals and insights with senior management and linking any results to improvements in business performance.

Only 55% of survey respondents believe that the measurement and rewards for agent work is actively aligned with the strategy of the wider business, with more than 1 in 5 respondents in medium and large operations actively believing that there is a misalignment: that agents are measured on metrics and outcomes that are not in line with what the organisation actually wants to achieve with its contact centre.

Figure 5: "The measurement and reward of agent success is closely aligned with the organisation's goals"



It might reasonably be expected that the agent engagement/reward programme will directly support those characteristics and achievements that are most highly valued by contact centres and businesses: specifically, customer satisfaction, attendance and punctuality, and customer service-focused metrics such as first-contact resolution rates.

The following table compares the agent characteristics and achievements that are **encouraged and required**, and are shown, in order of importance, on the left. The characteristics and achievements on which rewards are **actually based**, are placed on the right.

It would be expected that the most encouraged and desired characteristic would be that which was also the most important when considering how to reward agents: in this way agents would be rewarded closely based upon how much they aligned with the needs of the contact centre and the business.

High customer satisfaction scores are stated to be the most important, and are said to be rewarded the most often, which is as it should be. Other characteristics that are encouraged and rewarded do not quite match exactly, and there are two elements that particularly stand out.

The greatest discrepancy, and one that is cause for worry, is that key customer-focused service metrics such as first-contact resolution rates are seen as being the 2nd most important characteristic to be encouraged, but only rated as the 5th most important characteristic to be actually rewarded, putting this out of alignment with what the contact centre and business itself deem necessary for success.

On the other side, traditional contact centre metrics such as average handle time are rewarded more than they are said to be valued, despite an excessive focus on such metrics being potentially detrimental to the customer outcome.

By rewarding mismatched behaviours and achievements, the contact centre runs the risk of encouraging agents to behave sub-optimally.

Figure 6: Comparison between characteristics encouraged, and characteristics rewarded

Rank	Agent characteristic encouraged	Agent characteristic rewarded
1st	High CSAT / customer feedback scores	High CSAT/customer feedback scores
2nd	Key service metrics (e.g. first-contact resolution rate)	Good attendance and punctuality record
3rd	Good attendance and punctuality record	Key performance metrics (e.g. short average handle time)
4th	High adherence to schedule / availability	High adherence to schedule / availability
5th	Sales / conversion rates	Key service metrics (e.g. first-contact resolution rate)
6th	Key performance metrics (e.g. short average handle time)	Sales / conversion rates
7th	Key financial metrics (e.g. high % of promise to pay)	Key financial metrics (e.g. high % of promise to pay)

FLEXIBILITY, OWNERSHIP AND EMPOWERMENT

For an industry that was in large part based upon the “command and control” method of operating, encouraging agents to make their own decisions rather than follow a set process or script can be a culture shock for everyone. Many contact centres have been set up – deliberately or otherwise – to delineate tasks and responsibilities along very specific lines, particularly in larger operations. In practice, this means that only certain groups of agents have the capability to issue credits, remove delivery costs or late fees, provide discounts or even access some of the systems required to resolve customer’s problem. Analysis of escalations or repeat calls can point to processes and policies which, if adjusted to allow first-line agents to handle, would make a major difference to first-contact resolution, contact centre cost and customer satisfaction, along with agent engagement and satisfaction with their role.

To achieve a high level of first-contact resolution requires agents to take full control of an issue and decide the best way to resolve it themselves. The concept of ‘total contact ownership’ encourages the agent who has taken the initial call or digital contact to resolve this issue themselves: even if it is necessary to recruit a supervisor or the second-tier of support, the agent is still expected to follow the issue and make sure that it has been entirely resolved to the customer’s satisfaction. In this way, a resolution can be assured, the agent learns more about how to provide the correct answer themselves next time – improving their own morale and sense of worth – and the customer receives truly personalised and dedicated service.

However, empowerment does not just mean telling agents that any contact they take is now up to them to deal with first time. Contact centres must make sure that agents have the authority to handle contacts outside the norm, as well as the responsibility for making sure a successful resolution is reached. Systems and processes have to be put in place to allow agents access to the right resources and information, including knowledge bases, AI assistance and access to second-tier support as and when required. This latter point also needs to be emphasised to management, knowledge workers and technical support staff: it is not acceptable for such resource to mark themselves as unavailable, leaving the agent adrift. It may also be useful for back-office staff such as warehousing or delivery to be available to agents through instant messaging.

Of course, especially in the case of inexperienced agents, there needs to be a limit to what agents are actually allowed to do in the pursuit of contact resolution. As every business is different, there is no hard and fast rule and the analysis of escalations and callbacks is likely to indicate to the business how potential bottlenecks can be eased while still managing risk.

More information on this can be found in ContactBabel’s “The Inner Circle Guide to First-Contact Resolution”.

REWARD AND RECOGNITION

Offering higher pay is seen as beneficial to agent morale, but is little more than a short-term fix, and would not be an option for many contact centres to offer due to the significant increase in costs that this would occur. However, other forms of more targeted reward and remuneration can be effective in engaging and encouraging agents.

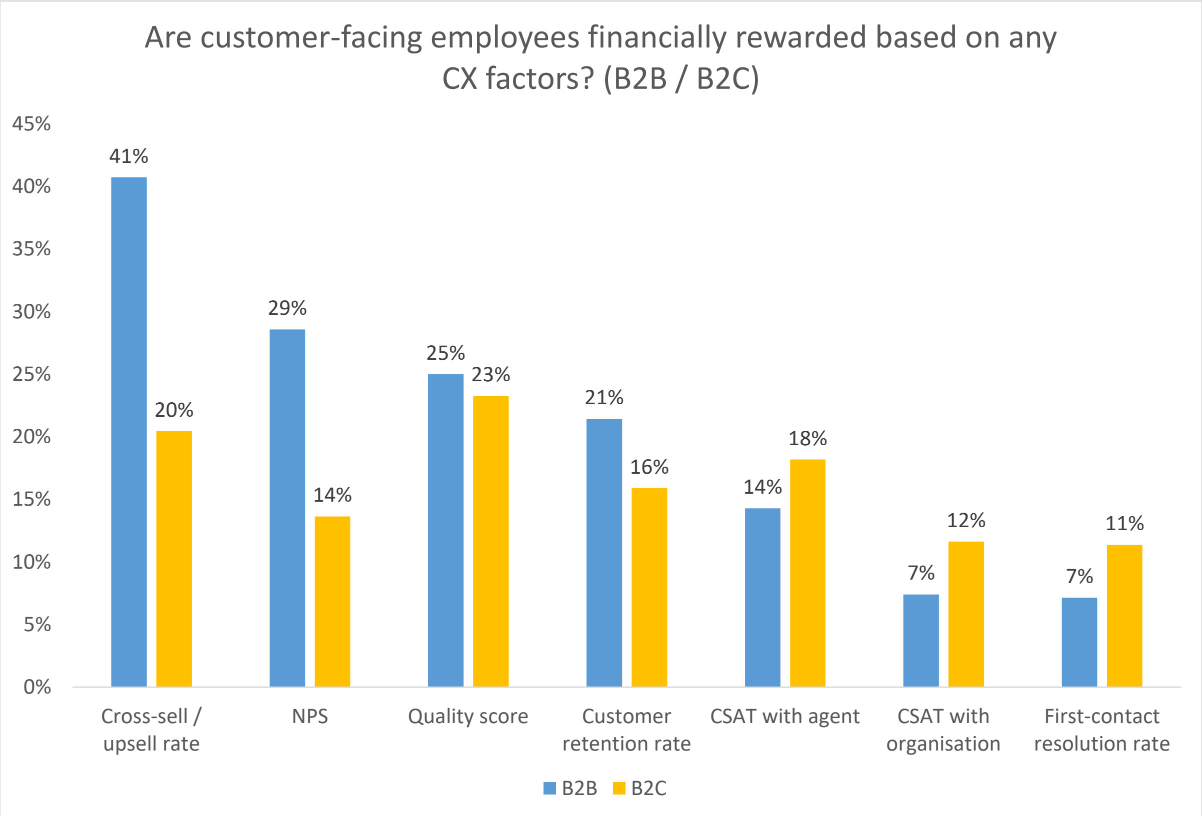
Survey respondents were asked if their customer-facing employees were financially rewarded based on any customer experience factors.

B2B respondents report a greater use of staff reward based on key CX metrics such as cross-sell / upsell, NPS and customer retention rate.

B2C organisations are more likely than B2B respondents to use customer satisfaction (whether general or agent-specific) as a basis for reward, although this is done in only a minority of cases.

It is disappointing and surprising to see the lack of importance placed by respondents upon rewarding high first-contact resolution rates despite its overwhelming importance to the overall customer experience programme.

Figure 7: Are customer-facing employees financially rewarded based on any CX factors? (B2B / B2C)



REMOTE WORKING AND THE EFFECT ON AGENT ENGAGEMENT AND MORALE

Homeworking / remote working has become vital to the business continuity plans of many contact centre operations, and many businesses may well find that reverting to the previous centralised contact centre model is no longer optimal and that remote working can bring greater flexibility and performance, augmenting the traditional way of operating.

Up until very recently, the majority of UK contact centres worked as a traditional, centralised model, with a small minority of agents working remotely at home on a permanent or semi-permanent basis.

Faced with the challenges of continuing to run contact centres in an environment decimated by coronavirus, many businesses urgently implemented business continuity plans which usually involved remote working.

Apart from this, homeworking / remote working promises contact centres significant benefits, including:

- the environmental benefits of working at home, reducing carbon emissions and decreasing congestion on the roads
- while offshore contact centres can be unpopular with customers, businesses still need to look at ways to cut costs, which include targeted working hours and reduced rent on office space
- increased flexibility in working hours means rapid response to call spikes and reduced idle time, as well as agents being more able to optimise their work-life balance
- increasing costs of recruiting and retaining staff allow agents outside the commutable distance to be employed at times that suit them and the business.

END-USER QUESTION #3: HOW DO WE KEEP OUR REMOTE WORKING AGENTS ENGAGED?

A couple of ways to keep remote agents engaged is to minimise the number of apps that agents are jumping between, and support them with real-time coaching and guidance that is even BETTER than what they'd get when a supervisor is watching.

Giving the tools that agents need is step one, and strong communication plays a huge role. Keeping remote agents engaged can be challenging, but it is essential to fulfilling daily, weekly, and monthly performance numbers to ensure that their customers are being served.

One activity that bolsters engagement for remote agents is building and accessorising avatars in the system that add a personal touch. These avatars can be viewed by others to get a sense of comradery for their team. The accessories used for the avatars can also be items that are purchased by agents with their gamification winnings.

Having access to more information—like customer surveys, quality evaluation scores, feedback, and how they are achieving their KPIs—also majorly impacts engagement and performance.

Flexibility and personal ownership over staffing can also impact remote workforce engagement—such as the ability to trade shifts and ask for time off. The supervisor can approve requests and the agent gets notified immediately, without going into the workplace or logging in to see what their shifts are. Mobile apps for anytime/anywhere connectivity, work-from-home, or in-the-office dynamics increases staffing optimisation while taking into consideration multi-skill and digital channel session handling. This makes the agents happy having the right people in place and empowering them with a voice.

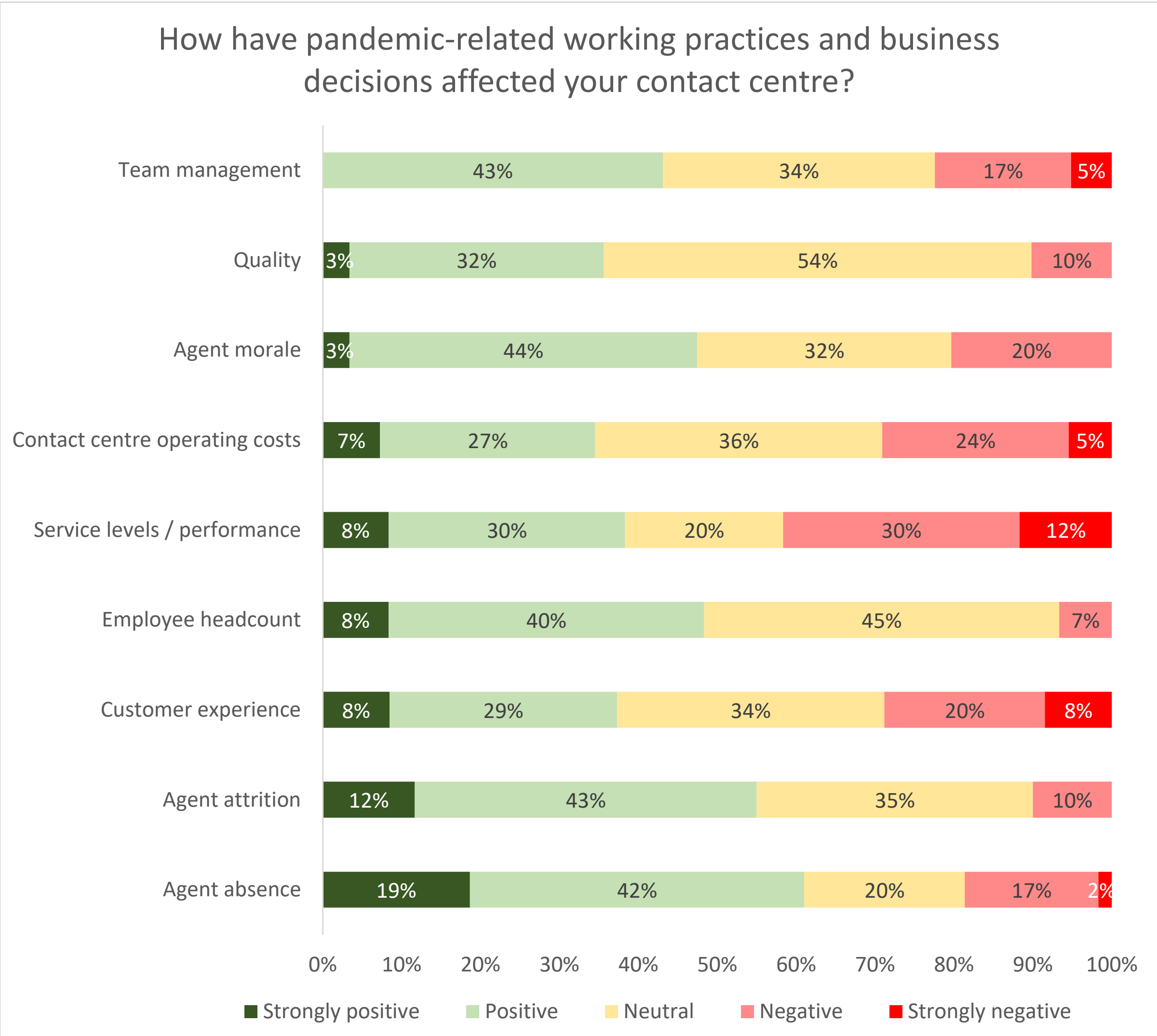
Survey respondents were asked how pandemic-related working practices and business decisions had affected their contact centres, particularly focused upon the often unplanned and rapid move to remote working.

The general feeling was remarkably upbeat: the effect on agent absence and attrition was particularly positive.

The effect on customer experience was more mixed, with 37% claiming an improvement and 28% a decline – it would be interesting to see customers' opinions of this – and many of the other factors were also claimed to have seen an improvement, particularly agent morale, quality and headcount.

Operating costs and service levels / performance attracted the most negative comments, but even here there was a significant amount of positivity.

Figure 8: How have pandemic-related working practices and business decisions affected your contact centre?

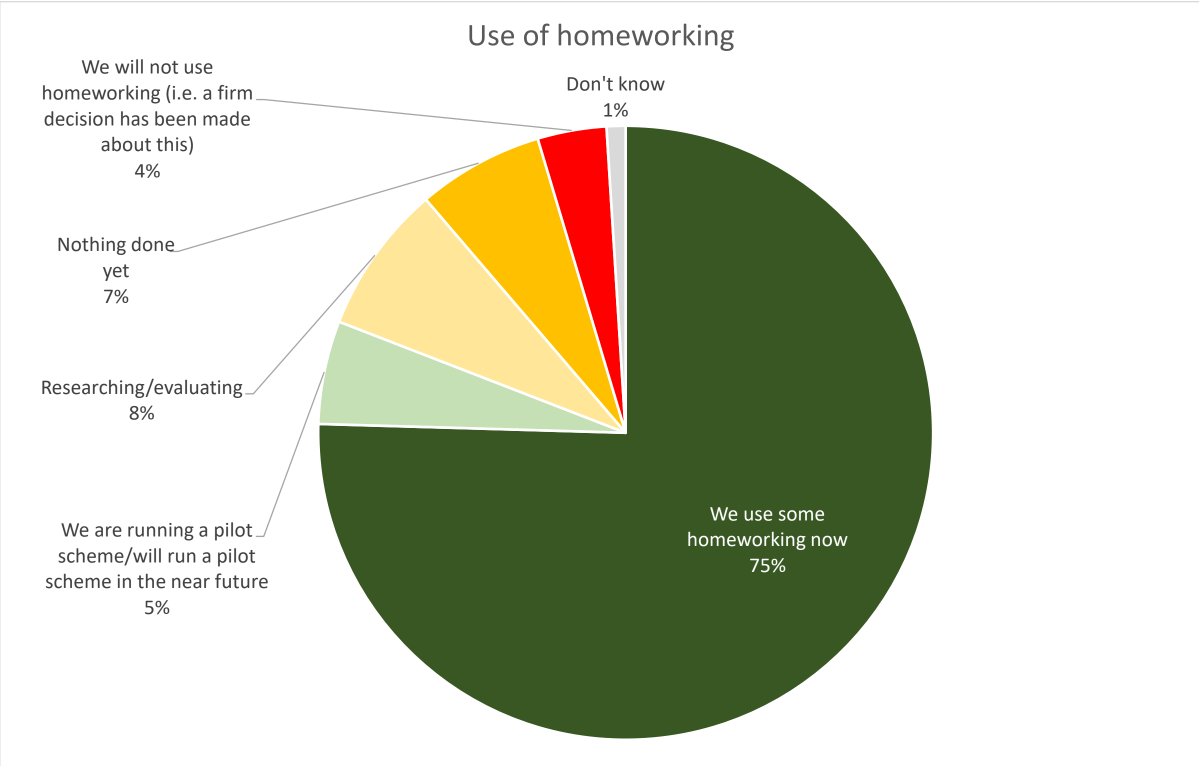


USE OF HOMEWORKING

Before the pandemic, 26% of survey respondents were using homeworking, with 9% running a pilot scheme or about to set one up, with these figures now 75% and 5% respectively.

Pre-Covid, 24% of respondents had not acted on homeworking, and 19% stated that they had made a firm decision that homeworking is not for them. For many of these operations, the decision had been taken away from them, and only a very small minority are still holding out against remote working.

Figure 9: Use of homeworking



The main homeworking benefits are usually reported to be around improved staffing flexibility and improved ability to handle overflow or unexpected volumes of traffic: in the same way that the virtualisation of multiple contact centre sites allows agents to be moved between virtual queues instantaneously, having a large pool of homeworkers to draw upon very quickly, as needed, can be a great advantage in handling call spikes.

This is certainly still the case, but of course the opportunity for business continuity that remote working provides is very clearly top of the agenda at the moment.

Figure 10: Most important benefits of homeworking, (respondents using homeworking now)

Benefit	Score from 10	% scoring 9 or 10
Disaster recovery / business continuity	9.7	98%
Staffing flexibility	8.0	59%
Reduced equipment and building costs	6.7	35%
Reduce staff attrition	6.6	25%
Overflow / call spikes	6.5	27%
Scarce skills	5.0	6%
Seasonal demand	4.5	15%
Incentives for staff	4.2	8%
Organisational environment goals	4.1	9%

To some extent, homeworking is also credited with reducing agent attrition, as it takes away the stress, cost and time of the commute and enables the employee to work in less stressful, more personal surroundings. This allows the business to offer a more flexible working day to their employees, for example, a 4- or 5-hour shift in the middle of the day, allowing the employee to pick up and drop off their children at school, which may also coincide with the busiest period of the day for the organisation. In such cases, the employee is happy to work the hours that suit them, and the organisation bears less cost. Agents are far more likely to be able to work an hour or two in the evenings as well, allowing the contact centre opening hours to be longer.

There is often concern that it would be difficult to manage homeworkers effectively from a remote location, which has always been an objection to this way of working. Isolation can be a problem for both agent and management, and not all roles or agents are suitable for homeworking.

Use of an Instant Messenger such as WhatsApp installed on the agent desktop allows agents to see who else is logged on and talk to them or ask for help, including their supervisor and other members of the team. The aim is to replicate the centralised contact centre model's quick and informal ability to request assistance or receive support whenever it is needed, rather than waiting for the next official scheduled meeting. However, supervising manager should make sure that they are not virtually hovering over the shoulder of the agent, as if they were waiting for them to make a mistake: it's a fine balance. Agent performance dashboards replicating what they are used to seeing in the centralised contact centre can also help motivation and engagement.

Posting information to online message boards on the agent's desktop is a good way of communicating up-to-date information, as well as supporting the feeling that the agent is working as part of a larger team. It is important to set expectations on the level and type of communication that agents and supervisors will have on a daily basis while remote working. If remote working is new for employees, it will be helpful if specific communication activities can be scheduled, at least in the early days when people are still finding their feet.

It is almost certain that in times of crisis, some of the metrics which are entirely appropriate to use within a centralised contact centre structure may be detrimental to the performance and morale of remote agents, so management should concentrate on outcomes rather than other metrics in order to reduce the stress upon agents. It may well be worth considering implementing gamification in order to encourage healthy competition and to make agents feel as though they are still part of a wider group.

Real-time communications are vital to supporting remote workers, in that they:

- deliver key communications about the company
- can be used to address concerns or rumours: a short video message from a C-level executive reassuring agents about the performance of the company and its long-term future can be helpful in reducing anxiety and improving focus. Large 'town hall' meetings can keep everyone up-to-date on the latest developments and make them feel that they are still part of the larger corporate body
- bring agents up-to-date with issues faced by other agents in near real-time, in order to prepare them for upcoming calls
- prevent agents from feeling that nobody cares what they are doing and that they are unsupported by making sure that the tools used offer the opportunity for immediate assistance from supervisors
- alert agents to be ready to move between channels as and when required
- encourage agents to speed up calls in times of extremely high call volumes
- make sure that they are adhering to schedule, and address any outlying performance issues (e.g. a series of extremely long calls).

Many businesses consider it best practice to take a morning meeting over video, involving all members of the team, in order to discuss any issues arising over the past day and discuss the type of work that the coming day is likely to hold. Scheduling a few free minutes at the end of the meeting to discuss personal matters and have a gossip has been highly recommended by contact centres who have only recently been forced into the remote homeworking scenario. Ideally, each meeting should have a fixed agenda which realistically reflects the amount of time each item should take and have a strong chairperson to enforce this, allowing time at the end of the meeting for socialising.

One-to-one video coaching sessions should be considered seriously: agents are likely to be feeling more isolated emotionally as well as physically, and a face-to-face meeting over video can help with this, especially for assessment and feedback where agents may be feeling uncertain about themselves. Recording all or part of the feedback session may also be useful for the agent to review in their own time.

Some agents will require more support than others, and the same remote management techniques do not work for every agent type. For example, the "farmer / hunter" model of salespeople is well-known, and there are other behavioural models for other contact centre employee types that take into account their confidence, communication skills, risk-taking, and attention to detail amongst other factors. Some of these character types prefer autonomy, but others thrive upon group interaction, whereas others may become stressed and anxious about not having the support around them with which they feel comfortable.[1]

Consider how experienced agents can become buddies or mentors to less experienced agents. If agents have particular experience of remote working already, they should be encouraged to share their thoughts and tips with the rest of the team.

In a remote working environment, having classroom-based lectures of an hour or more (even virtually) is usually less effective than it is in a shared physical environment. Shorter sessions of live video could certainly be used, but businesses should also consider implementing more computer-based e-learning and cutting training into more manageable, smaller chunks.

Consider implementing a real-time customer feedback application which can show each agent what customers are thinking and where to focus any improvements. Sharing the performance of the team and individual regularly throughout the day provides motivation and feeling of belonging to the team as if they were working in a centralised environment.

[1] See http://www.salesmatch.com/downloads/transferring-to-home-working.aspx for more information on identifying, managing and motivating agent types

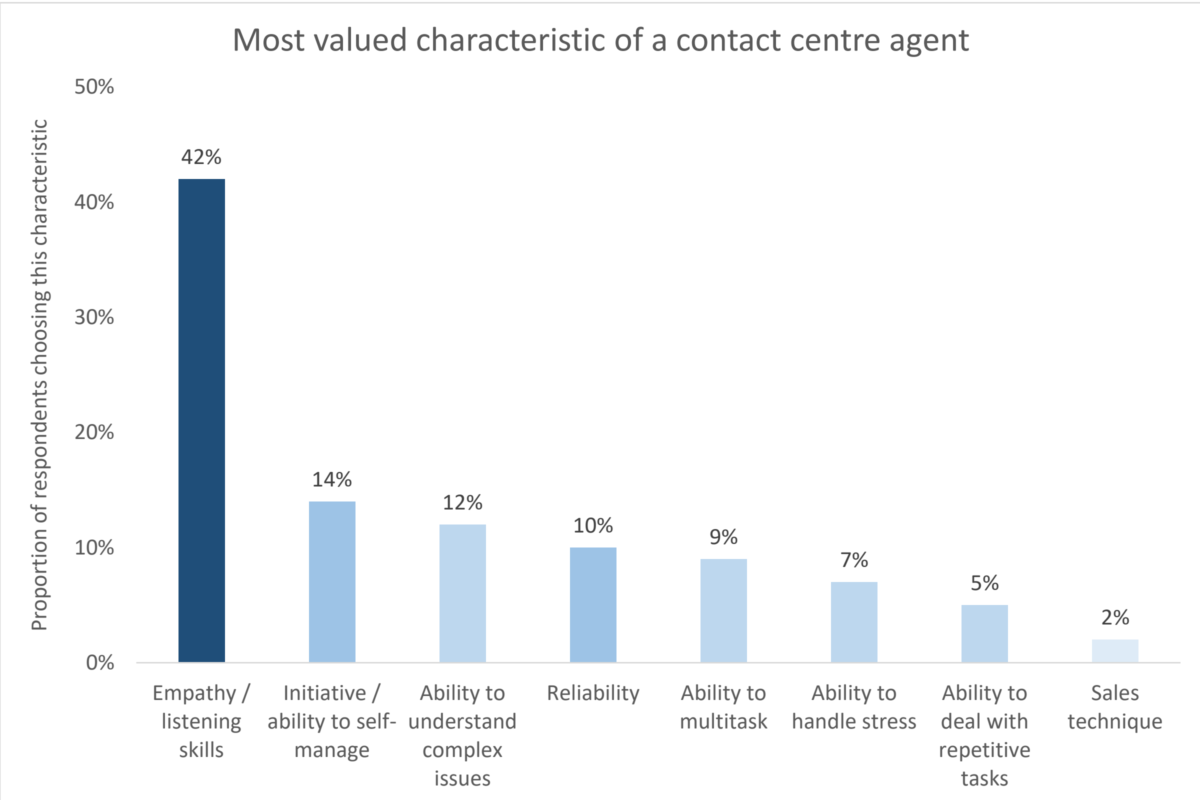
EMPATHY AND EMOTIONAL INTELLIGENCE

42% of survey respondents stated that the most valued characteristic of a contact centre agent is their ability to listen to and empathise with the caller. This ability is seen as being far more important than initiative, being able to handle stress, multitask, sell effectively or understand complex or technical issues.

While some people naturally have this skill, experience and directed training can maximise it in others. As self-service and AI-enabled solutions handle increasing amounts of straightforward customer interactions, those that are left to be handled by a telephony agent will be of a more complex nature and/or of a type where the customer needs reassurance and empathy. This can be seen by the very significant increases in average call duration in the past 15 years, with the typical inbound service call rising in length by over 2 minutes since 2003.

Encouraging and supporting agent empathy will drive up customer satisfaction, and also make the agents more engaged by feeling that they are doing a good job of helping customers.

Figure 11: Most valued characteristic of a contact centre agent



In order to engage with customers, agents need to display empathy and have the emotional intelligence to recognise what the customer is feeling and to react accordingly while maintaining the authority to control the interaction. This means that there's a lot to think about on a call, and much of this – hopefully – occurs unconsciously to the agent. While some of these skills can be coached, the easiest way to ensure high levels of emotional intelligence is perhaps to recruit people with these skills in the first place.

Emotional intelligence is a step beyond empathy, the latter of which can be shown by acknowledging the customer's requirements, showing that the agent cares and reassuring the customer that the issue is being dealt with correctly.

Yet some customers prefer not to be obviously emotionally "handled", and are turned off by overly solicitous actions and words, preferring a precise, clinical resolution to the issue. An emotionally intelligent agent will be able to recognise the verbal cues that indicate a customer's preferred style of communication as well as understanding how to modify their own behaviour to deliver what the customer wants, in the way that they want it.

Emotional intelligence implies a flexibility of approach and communication skills that is driven by listening to the customer, rather than consistently maintaining the agent's natural style (e.g. extroversion) in all situations. Emotional intelligence is a difficult thing to measure, but it can be improved upon by coaching: for example, playing call recordings of situations involving different emotions which have had positive outcomes is a good start, but agents really need to be given the empowering skills and tools to make decisions on communication style themselves while actually on the call.

These could include encouraging agents to:

- give reassurance that the issue will be solved
- take personal ownership of the issue (this must be backed up the company actually empowering the agent to carry out their committed promise)
- listen actively and demonstrate that they actually understand the customer's issue
- acknowledge the customer's feelings, but do so in a positive way ("I can understand why you're upset but I will personally make sure that this issue is resolved to your satisfaction"). This should only be done after the customer has fully explained the whole issue, otherwise it can seem glib.

It may also be useful to gather a list of positive and negative phrases to use or avoid, based upon what the agent group has found useful or unhelpful before.

Additionally, the agent's tone of voice plays a large part in how the customer feels about the conversation. Positivity, especially at the beginning and end of the call can make a big difference to the customer's overall feeling about the interaction. This can be difficult for some agents, who may in fact be naturally empathetic but may be taking the 40th or 50th call of a difficult day, or who may naturally have a less dynamic voice.

Customer emotion is closely connected to the memory they have of the brand and previous interactions, meaning that an effective interaction is not sufficient in itself to form a positive emotion that the brand can benefit from in the future, but that customers actually have to feel good enough about the interaction to form strong positive memories. This requires not only emotional intelligence from the agent, but also the empowerment to deliver what the customer needs from the interaction, even (and especially) if it is out of the ordinary.

Research[2] has shown that repeat business and high levels of NPS are more associated with positive emotion than with a successful outcome or low levels of customer effort. Just because a caller enters the conversation with negative emotions does not mean necessarily that they have to end it that way: the contrast and emotion of a seemingly intractable issue being resolved successfully can actually produce a higher positive emotion than if there had been no strong negativity at any stage of the interaction.

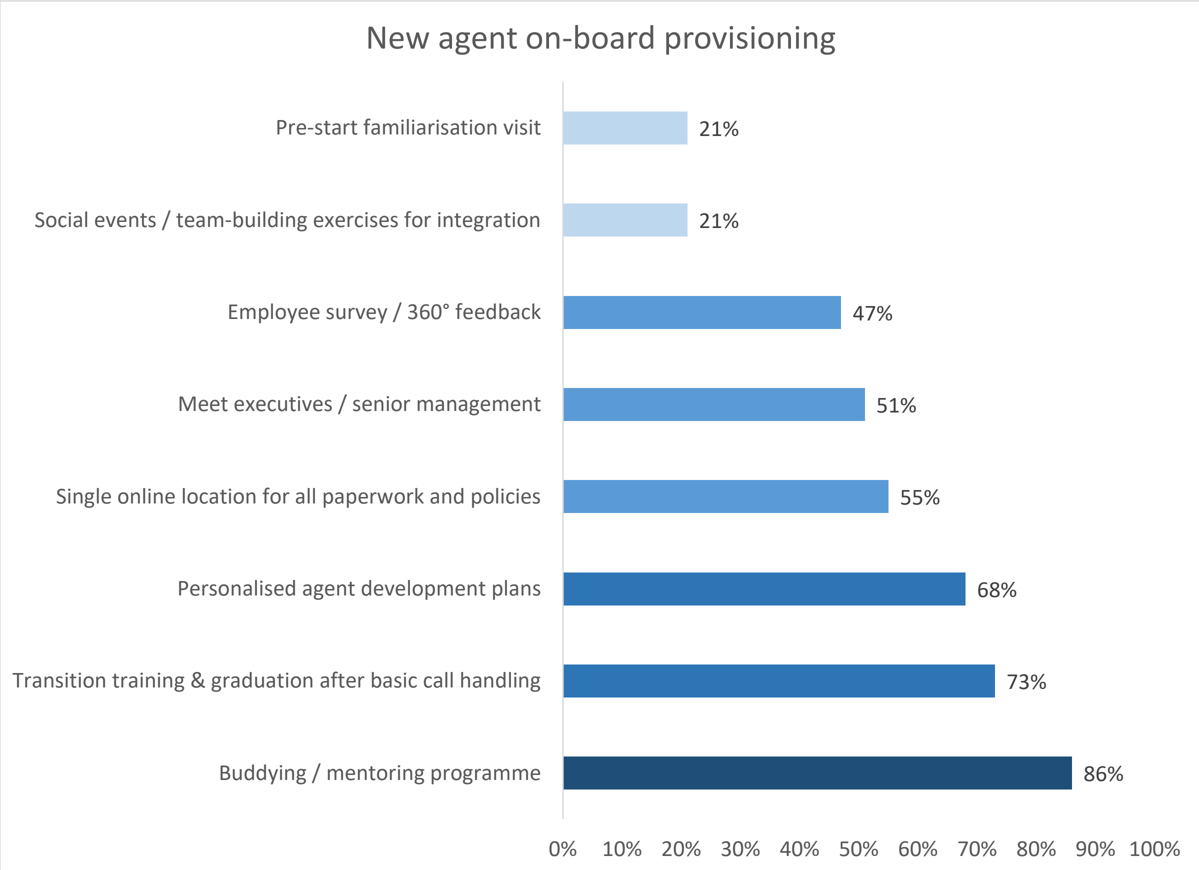
The "peak-end" rule is relevant to many customer interactions: where we remember how we felt at the peak moments (whether positively or negatively), as well as at the end of the conversation or process. An example often used by micro-retailers is to include a free minor item with a large order (but not to mention it on the website or in the call), so that at the end of the sales process – when the package is actually opened – a strong positive emotion is produced, increasing the brand awareness and the likelihood of future purchases with that supplier.

[2] Temkin Group

ENGAGING THE NEW AGENT

An agent joining a new organisation has a lot to take on board – culture, systems, expectations, new products and services – and this becomes even more difficult if this is the first time that the agent has worked in a contact centre environment. Businesses have numerous ways of introducing (or 'onboarding') new agents to their work in order to build engagement with their role and team, shown in the following chart.

Figure 12: New agent on-board provisioning



Most respondents have a buddying / mentoring programme, and some form of official 'graduation', easing new agents into the real work after basic call handling training. Social events and senior management introductions usually feature quite highly, although the pandemic obviously severely reduced the opportunity for the former. 68% provide individual agent training plans, which is growing each year.

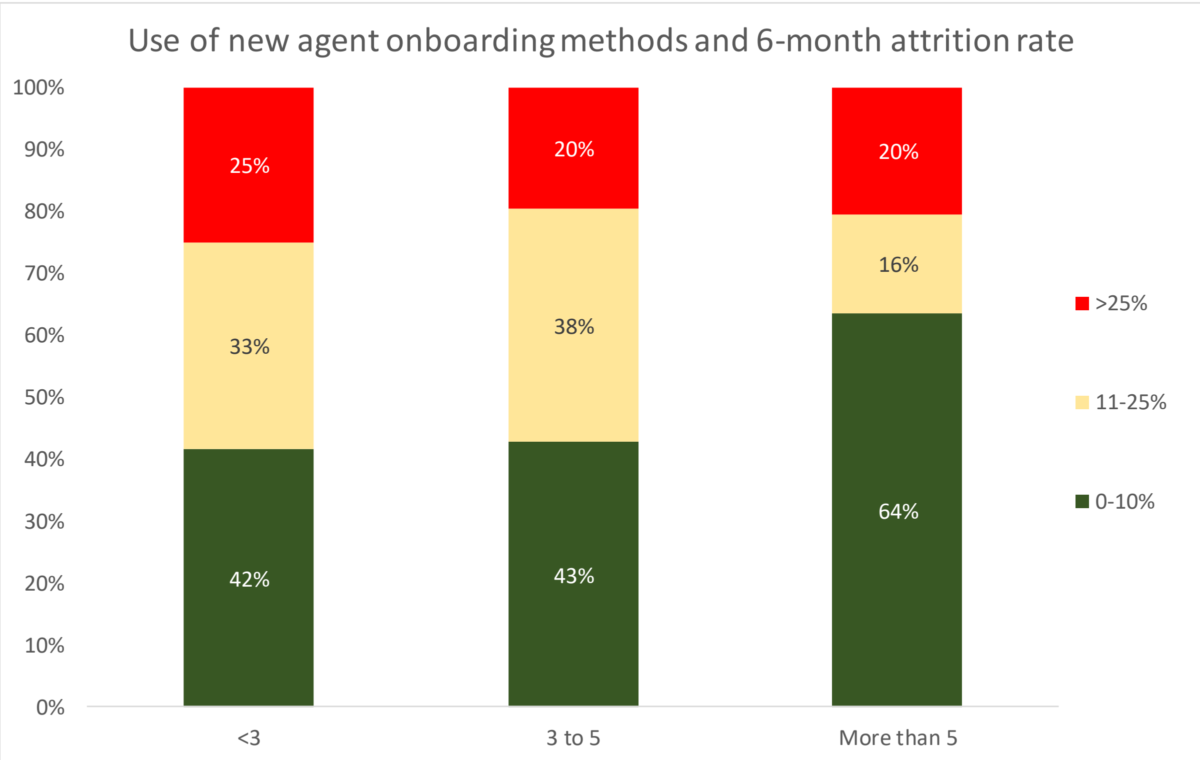
Just under half of respondents seek 360 degree feedback from new agents (which would provide vital information about the reality of the agent onboarding process that could be used for improvement), and 55% offer a single portal containing all of the paperwork and internal administrative tasks that a new employee requires. Only 21% have pre-start familiarisation visits (a drop from 36% pre-pandemic, for understandable reasons), the other 79% dropping the agent in at the deep end on their first day.

It was hypothesised that high levels of agent onboarding and support would reap benefits through lower new agent attrition levels. The chart below shows three ranges of new agent attrition (leaving within 6 months) – 0-10%, 11-25% and 25%+ – and investigates how many types of onboarding methods were used by respondents within each group.

While correlation does not prove causation, it is clear that a higher proportion of those respondents using more onboarding methods had a lower short-term agent attrition rate: 64% of those respondents offering five or more of the onboarding methods described above had low new agent attrition, compared with only 42% of contact centres which offered fewer than three. It may well be that agents receiving more onboarding support in their first few weeks adapt to the work and culture more quickly, become more confident and feel more empowered.

It should also be taken into account that while large contact centres tend to offer more onboarding methods, they also have higher than average attrition rates in any case, which will tend to dilute the positive effect of onboarding.

Figure 13: Use of new agent onboarding methods and 6-month attrition rate

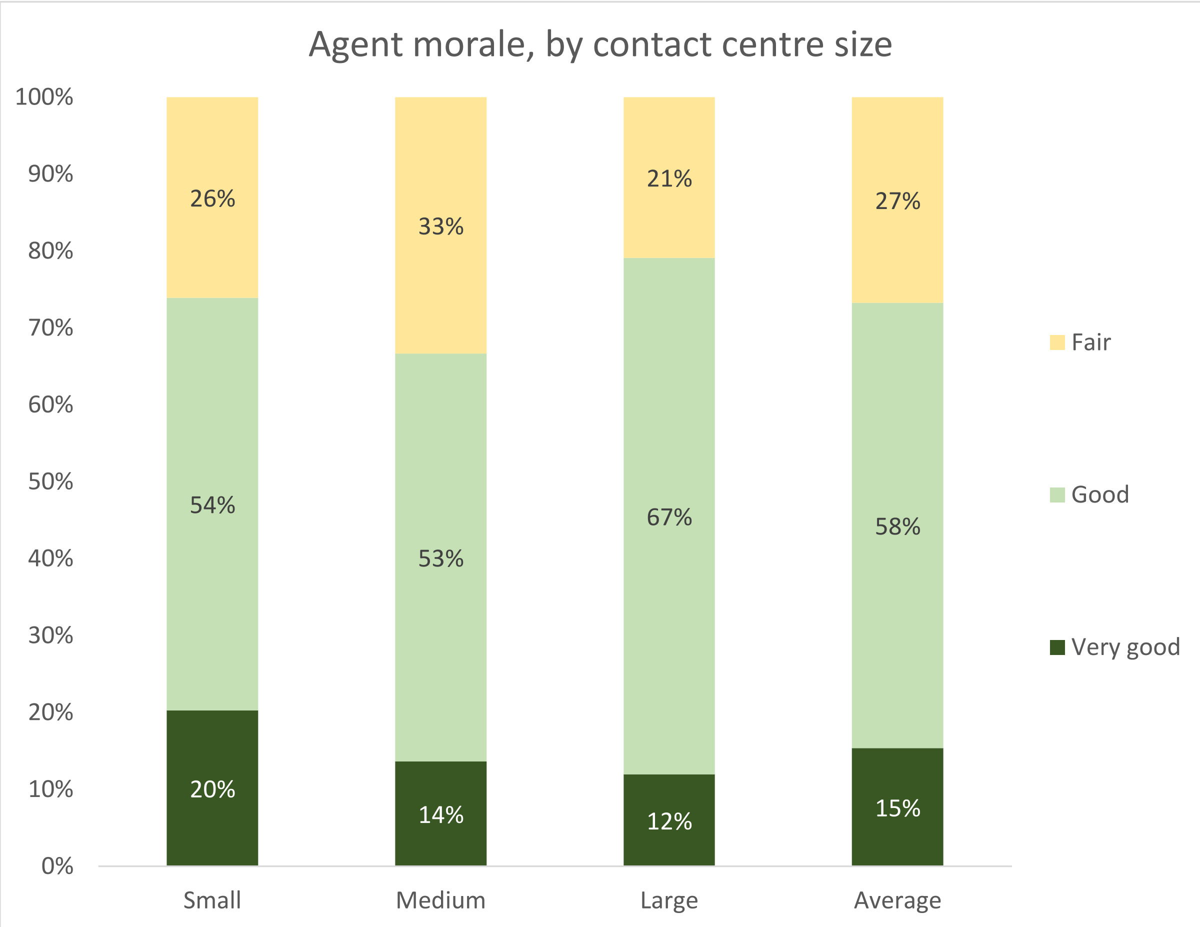


Motivating and keeping good agents in a working environment that is often stressful, sometimes repetitive and usually not particularly well paid is a challenge the contact centres have had to face since their inception. As the nature of contact centre work becomes increasingly complex, and customers' expectations of what constitutes good quality service becomes ever higher, the agent's job is now rarely just reading something off the screen: they have to be empathetic to the customer, use their initiative to solve the issue and remain focused on answering the next contact just as effectively.

AGENT MORALE

Agents with low morale engage with customers less, provide lower quality work, take more unauthorised absences and end up leaving the company. Improving morale is good for business, and also good for other agents and the entire working environment: no-one wants to go to work in a miserable place.

Figure 14: Agent morale, by contact centre size



Looking at the previous chart, it seems that contact centre morale is generally seen to be positive, with 73% of respondents stating that their contact centre enjoys "Good" or "Very Good" morale, although this is less the case for mid-sized (51-200 seat) operations, where 33% of respondents report morale being "Fair". Pleasingly, no survey respondent reported "Poor" morale.

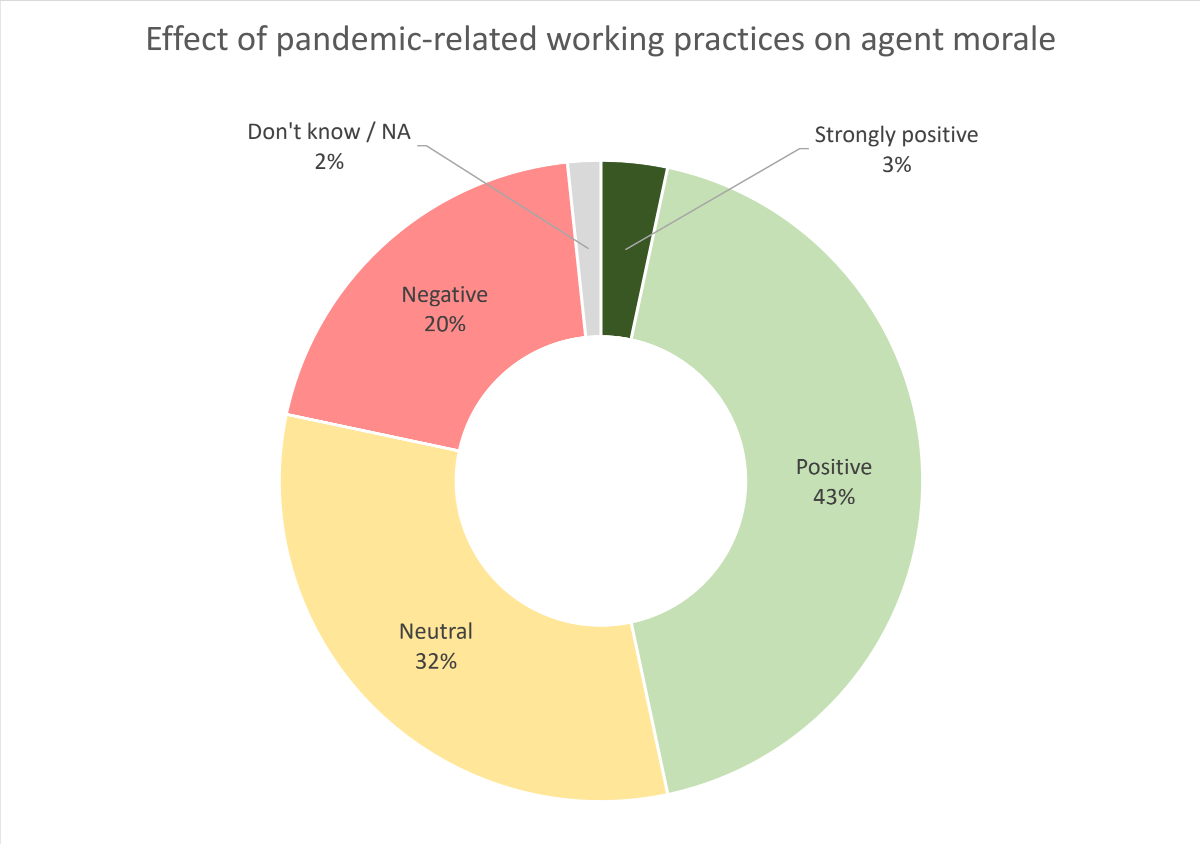
In a contact centre, where agents are sometimes doing mundane, tedious work and interacting with the public, it's crucial to acknowledge the way feedback is being given. How managers provide feedback to their agents most certainly impacts morale! Let's look at some examples:

It's not much of a morale boost for contact centre agents to hear that they may not be performing to standard—or even just being asked to improve. By using gamification, those agents can be challenged quickly to improve in areas that the company has deemed critical. And, in this way, agents may not even recognize that they are being challenged to improve since it's being turned into a game. From the agent perspective, being able to win prizes, in addition to normal pay for the job, is always a bonus and a way to reward outstanding performers. This will also help to identify agents who are performing at the highest levels and those who may be struggling.

Today's agents can be far more engaged by learning in the moment and receiving unbiased feedback based on performance standards. Morale can be improved no matter where an agent is located with many new AI-infused monitoring and feedback products, both in real time and by assessing the quality of the interaction afterwards. Giving agents unbiased views and having an equal voice in their progress can increase morale and engagement as well as decrease attrition—a win-win!

Despite the widespread move to remote working, with the risk of isolation and the attendant difficulty in supporting agents, only 20% of respondents felt that it had a negative effect on agent morale, with 46% stating that it had been positive in some ways.

Figure 15: Effect of pandemic-related working practices on agent morale



When new agents first arrive into the contact centre, it is an ideal opportunity to emphasise the culture of first-contact resolution to them, especially for those who have previously worked in operations that are focused more on handle time and other traditional performance metrics. Experienced agents can also benefit from a different culture, one which focuses upon the key metric impacting customer experience: first-contact resolution.

Within reason, agents should be cross-trained as widely as possible in order to expand their knowledge of the company's products and services, which will reduce call transfers and callbacks. Having agents that are able to handle support, billing and sales queries – quite apart from improving FCR – is also likely to boost agent morale and customer satisfaction as well as being able to manage call spikes more effectively. Even if an agent cannot deliver every aspect of service that the customer may require, a working knowledge of what other departments actually do will allow them to help the customer find the right resource and manage expectations.

As contact centres are usually extremely dynamic environments, new issues and problems may arise from one moment to the next. It is of crucial importance that there is a real-time communication system in place on the agent desktop so that they can be made aware of any new customer issue that they are likely to have to handle in the short term, as well as how to resolve it. This ongoing training extends to new product launches, widespread marketing campaigns and any changes in company policies or pricing which may cause a rise in customer interactions.

However, it is neither possible nor appropriate to train every agent on every possible product or scenario: businesses should analyse where they can see the greatest gains by focusing training efforts, which means that they should be aware of:

- the number and type of calls which are most frequently escalated to second-tier support
- the number and type of calls which are handled effectively first-time
- the type of calls which most often end in repeat contacts
- each individual agent's strengths, capabilities and weaknesses (e.g. empathy, communication style, ability to learn new technical facts, etc.).

It is also vitally important to provide agents with access to the correct systems, knowledge bases and any extra level of live support (e.g. supervisors, AI, etc.), as well as encouraging them to own the issue rather than worry about excessive call lengths. The next section on agent engagement solutions considers this in depth.

To maximise first-contact resolution, agents should be trained and assessed on their communication techniques: ideally, the agent will provide all of the information necessary to resolve the customer's issue clearly and completely, as well as answering questions that the customer has not yet thought of, but which are often associated with this particular issue (thus avoiding callbacks). However, agents must be encouraged not to overcomplicate matters for fear of diluting the solution and confusing customers.

Where appropriate, calls should always be ended with the agent asking whether they have fully answered the customer's query. While some businesses may use this information to assist their FCR calculations, it is also useful in that it gives the customer a chance to clarify any confusion and to give them the confidence to ask another question without feeling that they are being pushed to end the call. Overall, a few more seconds spent on a call can make a difference to FCR and all of the benefits that it brings to the agent, customer and business.

AGENT ENGAGEMENT & EMPOWERMENT SOLUTIONS

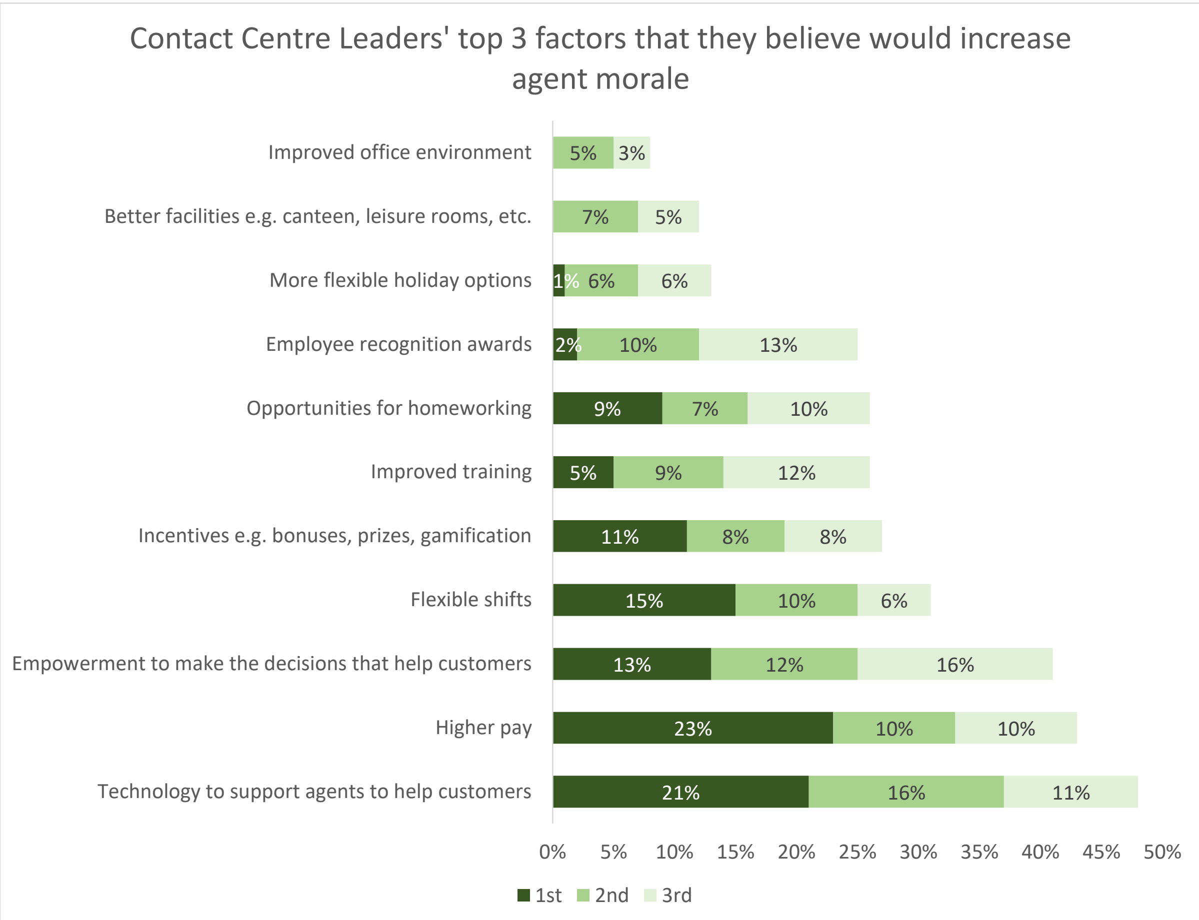
Survey respondents were asked to choose the top three factors that they thought most likely to improve morale. Although the most popular no.1 choice – increased salaries – may not be realistic for most contact centres, there is usually a correlation between salaries, attrition and morale.

Giving agents the empowerment to make decisions that help customers has a very positive effect on morale, with 41% putting it in their top three overall. Empowerment – the support provided by the systems, processes and organisational culture required to help an agent solve the customer's query – is closely linked to first-contact resolution. First-contact resolution rate directly impacts upon morale and engagement: if agents are unable to help customers, they become discouraged which leads to higher levels of agent attrition and absence, as well as a greater number of callbacks and call transfers which then impact negatively upon cost, performance, quality and customer satisfaction.

Respondents were strongly of the opinion that improving the technology available to support agents would make a positive impact upon agent morale. Solutions such as knowledge bases, real-time analytics, a 360° view of the customer and a single unified desktop also empower the agent to deliver a successful resolution first time.

This section of the report looks at some of the solutions that can impact positively on agent engagement and empowerment by removing some of the more mundane work and supporting agents to get the best outcomes for customers.

Figure 16: Contact Centre Leaders' top 3 factors that they believe would increase agent morale



END-USER QUESTION #5: HOW CAN TECHNOLOGY WORK ALONGSIDE AGENTS TO IMPROVE THEIR EFFECTIVENESS AND ENGAGEMENT?

Providing tools can help agents learn and understand how they are performing and engaging with their customers, team, and management.

Technology really can be an agent's best friend. With so much technology available to us, why not use that technology in your contact centre to improve agent effectiveness, performance, and engagement?

Gamification allows contact centres to drive increased performance, but it also allows agents to engage in fun and competitive games to increase engagement and drive key performance indicators (KPIs) for your organisation.

Quality management engages agents with balanced feedback across positive and negative interactions and gives them a voice in the process. An easy-to-read snapshot with capabilities infused by artificial intelligence (AI) indicates customer sentiment. This provides agents with a view of their performance against soft-skill behaviours—which have traditionally been challenging traits to review. Collaboration also becomes easier through the ability to see all sides of the story (that is, from the perspective of the evaluator, customer, and agent) in a machine learning (ML) level, in an unbiased way. Keeping in mind that it's just as important to reward those who are doing a great job as it is to develop those who have areas to improve will also help keep your agents engaged, informed, and equipped with data that all can trust.

Real-time agent interaction guidance can help agents elevate their performance-enhancing agent soft skills at the moment that an interaction is occurring. By instantly scoring agent behaviours, it's a more meaningful way of encouraging agents to learn and improve, on every call!

Workforce management brings in the ability to forecast and schedule dynamically based on contact volume and staffing levels—making sure agents are properly staffed can make or break the employee experience. The challenges to optimise in a digital world (where customer interactions may occur through different channels) is exponentially more computationally intensive and demand technological assistance in the form of AI/ML to be effective. Lastly, the ability to communicate with employees and offer solutions where employees can have a voice in their scheduling can also be achieved with technology. A good example is having an agent mobile app to manage one's schedule, request time off, or swap a shift. This can be empowering and provide instant gratification to the employee. These are crucial elements that play into employee satisfaction (ESAT) and eventually affect turnover.

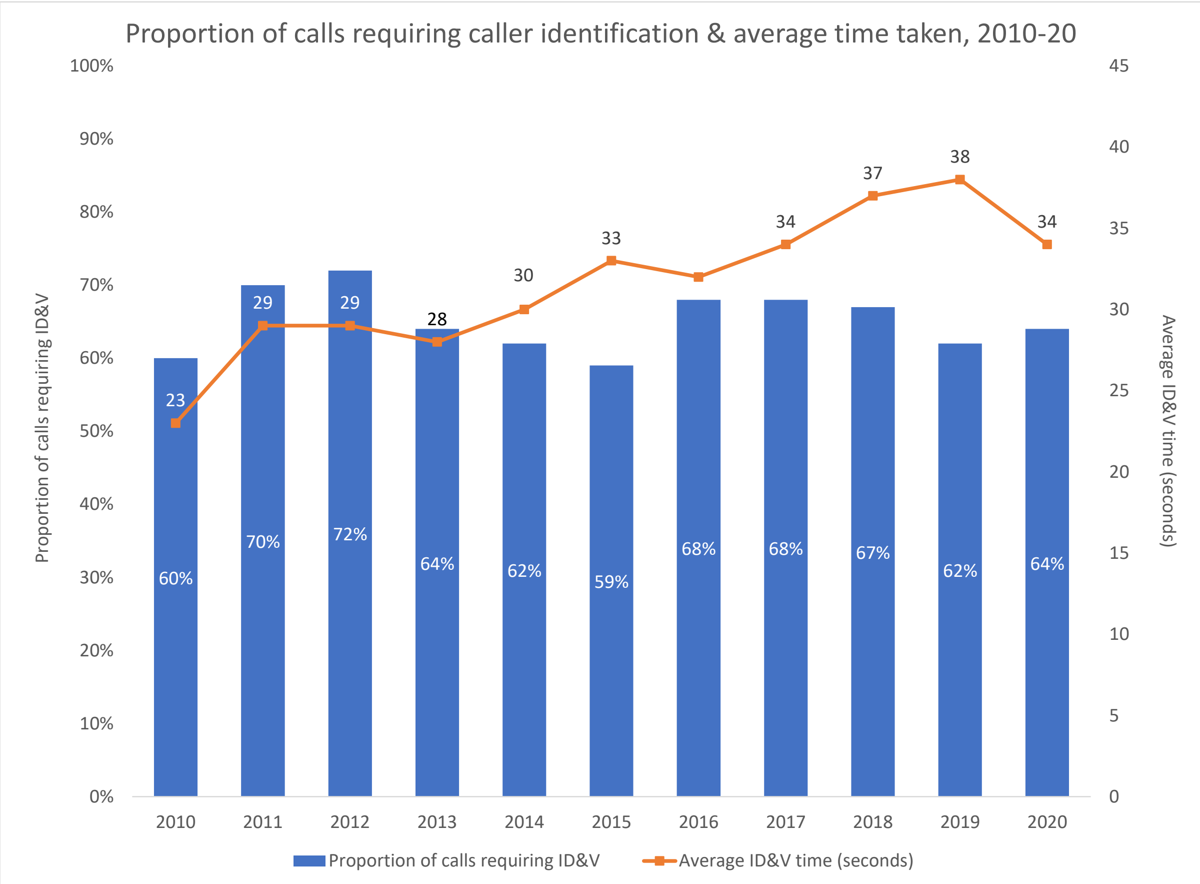
How do Customer ID Verification Solutions support agent engagement & empowerment?

- Reduce repetitive and time-consuming tasks at the start of the call
- Can move straight into the conversation without interrogating the customer

Increasingly, customer identity verification has become intrusive and inconvenient for the customer, who is expected to remember an increasing array of IDs, passwords, PINs, memorable information, or details of their last transactions.

It takes an average of almost 40 seconds to verify a customer's identity manually, and this mounts up considerably: the UK contact centre industry spends billions of pounds each year just to verify the caller is who they claim to be and are permitted to do what they are asking. Many customers struggle to remember multiple passwords, and with numerous website hacks taking place, passwords that are used for more than one activity risk being exposed and used by fraudsters.

Figure 17: Proportion of calls requiring caller identification & average time taken, 2010-20



Identity verification processes are typically based on one or more authentication factors that fall into the following generally-accepted categories

- something you know - e.g. password, PIN or memorable information
- something you are - a biometric such as a fingerprint, retina pattern or voiceprint
- something you have - a tangible object, e.g. a PIN-generating key fob, or the 3- or 4-digit security code on payment cards.

Combining these factors creates a more complex, and potentially more secure two-factor or three-factor authentication process, although being able to rely upon a previously enrolled voiceprint or having the calling device, location and other factors assessed pre-call can make identity verification far quicker and easier for the customer.

This is also likely to impact positively on agent engagement: an agent taking 80 calls per day will spend around 45 minutes of an eight-hour shift doing the mundane and repetitive task of taking customers through security.

Over the past decade, our surveys have found consistently that around 60%-70% of calls require identity checks, which take considerably longer due to more stringent testing (a rise in the length of authentication of around 50% since 2011). Although in-call efficiency has improved, identity verification is certainly no faster than it ever was: all factors which drive up the cost of initial identification.

95% of respondents who authenticate identity do so through human means, taking an average of 34 seconds to do so. Respondents that use IVR or speech recognition also use the agent to double-check in a large proportion of instances once the call is passed through, wasting the caller's and agent's time and increasing the contact centre's costs.

Figure 18: Caller identity authentication methods (only those contact centres which authenticate some or all calls)

Identification method	Proportion of callers identified using this method
Agent	95%
DTMF IVR (touchtone)	8%
Speech recognition	2%
Voice biometrics	1%

Biometric technology uses physiological or behavioural characteristics to verify a person's claimed identity. Physiological biometrics includes fingerprints, iris, or retina recognition, and voice verification. Behavioural biometrics includes signature verification, gait and keystroke dynamics.

Of these, voice is the only biometric that can currently be used over the phone, making it a viable identity verification solution for contact centres. Voice verification systems use spoken words to generate a voiceprint, and each call can be compared with a previously enrolled voiceprint to verify a caller's identity.

A significant advantage of voice biometric verification is that both enrolment and verification can be done unobtrusively – in the background during the natural course of customers' conversations with an agent – using text-independent and language-independent technology.

Real-time authentication significantly reduces average handle time and improves the customer experience by utilising voice biometrics to authenticate customers within the course of the conversation, meaning agents can immediately begin to assist the customer with their query. For procedures such as internet password resetting, the higher level of security achieved with voice verification can enable businesses to offer real-time password resets or reminders. This benefits agents, customers and businesses, and can reduce up to 70% of helpdesk calls.

How does an omnichannel hub support agent engagement & empowerment?

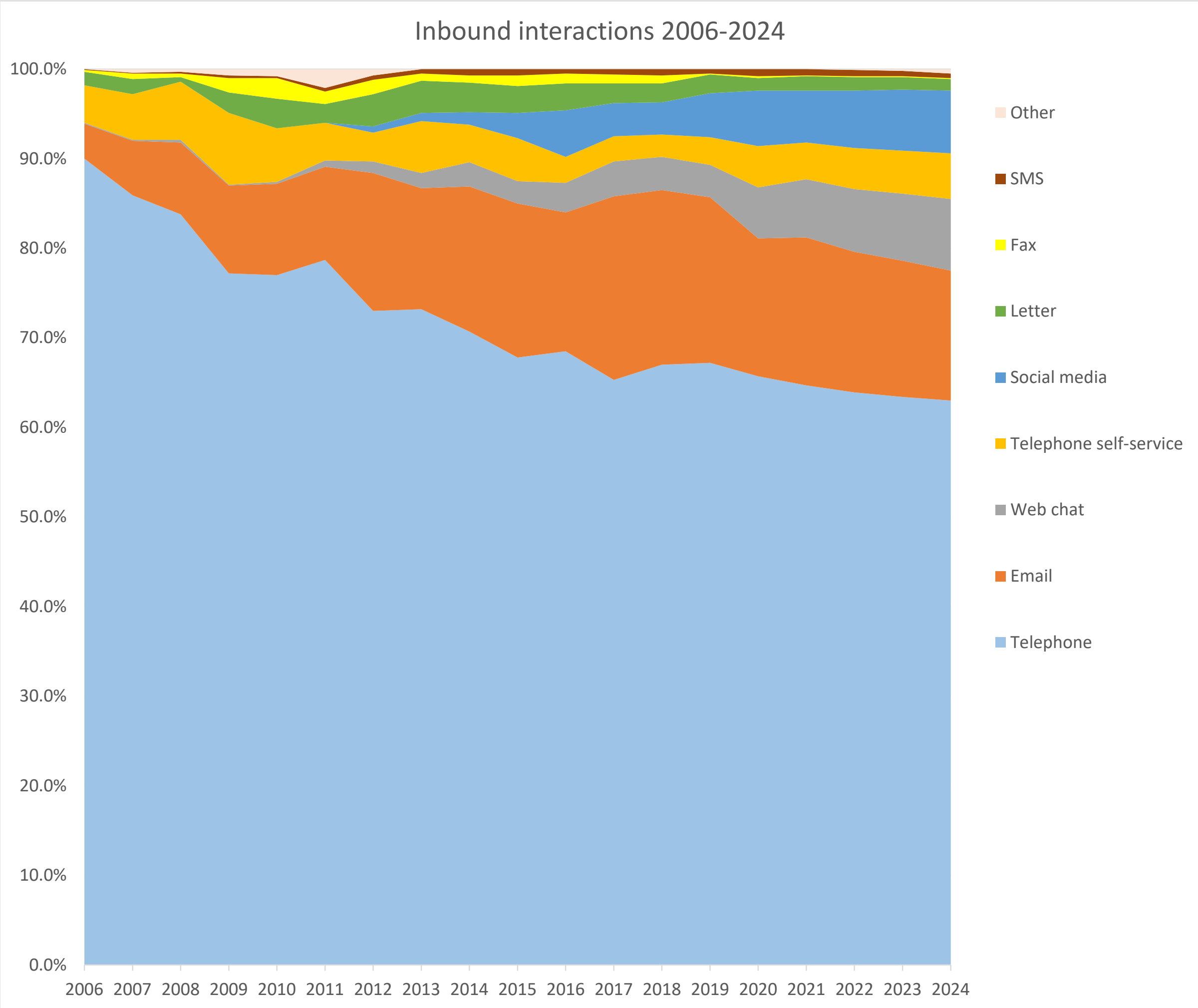
- The technology platform supports a single view of the customer across channels, meaning that the agent is fully aware of what the customer has said and done before
- Having everything on one screen means that the agent does not have to switch between applications to see the full picture
- Being able to communicate on various different channels as required means that first-contact resolution rates should increase as agents can handle everything in one session rather than passing work onto other agents
- Blending digital and voice work has been shown to correlate with improved agent morale and lower agent attrition.

With the rise in digital interactions, contact centre work has generally moved away from being solely related to the telephone, and many agents have had to learn new skills. This can be positive from the perspective of variety and engagement, but having multiple channels can bring problems, particularly if they are siloed and the customer information in one channel is not easily available in another.

The following chart shows the proportion of inbound interactions by channel since 2006, with predictions shown until the end of 2024. The most obvious thing to note is that telephony has declined from 90% to around 65%, and that email has risen considerably, followed in recent years by web chat and to a lesser extent, social media.

Non-telephony communication accounts for over one third of inbound interactions in UK contact centres, showing that the capability to handle both voice and non-voice communication effectively is vital for the industry: hence, omnichannel.

Figure 19: Contact centre inbound interactions by channel, 2006-2024

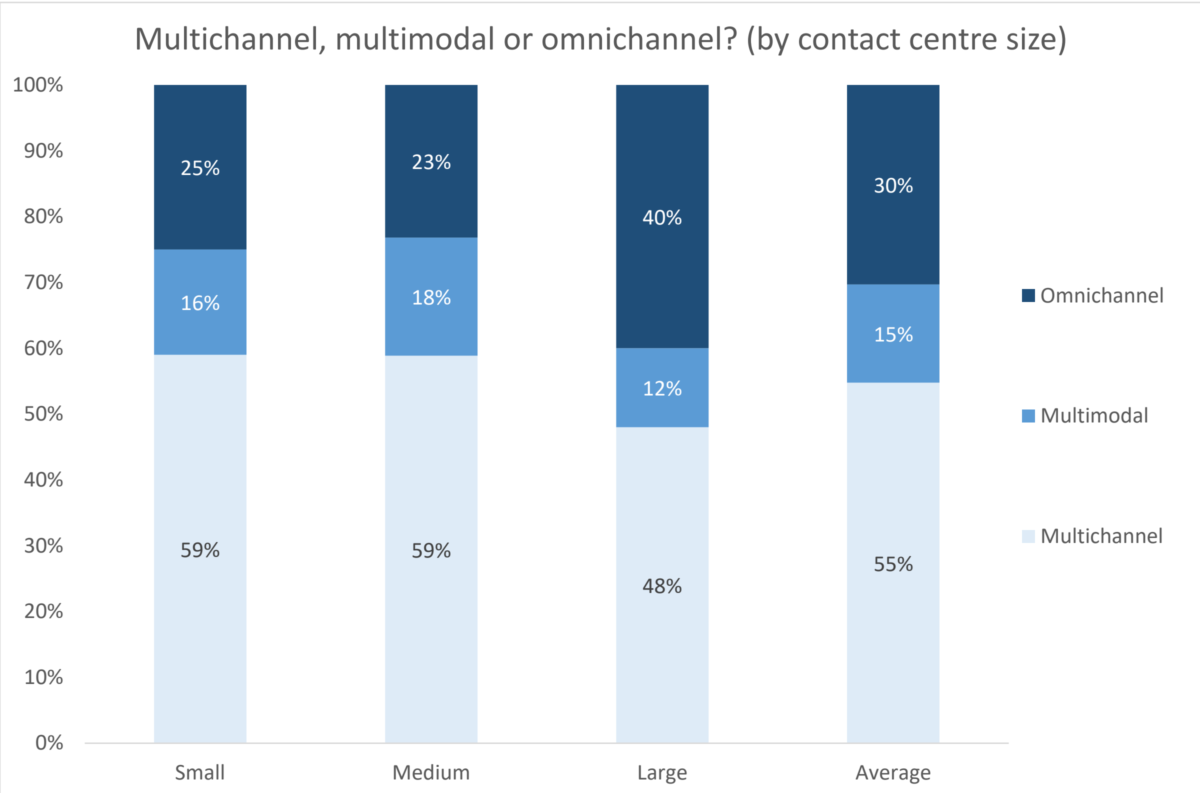


Recent years have seen the word ‘omnichannel’ introduced as describing the goal of customers being able to contact (and be contacted) through any channel – switching between them during the interaction as appropriate, while taking any relevant data and history along with them – with a single, unified view of the customer’s journey being available to the agent.

For the purposes of describing how far along the omnichannel process our survey respondents are, those who offer multiple communication channels to customers were asked to place themselves into one of three categories:

- Multichannel: “We offer a choice of channels to customers (i.e. several of voice, email, social media, web chat), from which they can use one in a single interaction. If they change channel, the context and history is lost”
- Multimodal: “We offer a choice of channels, and customers can use more than one in the same interaction (e.g. an agent can send an email or SMS to a customer while they are talking on the phone)”
- Omnichannel: “We offer a choice of channels, and can use more than one over multiple interactions, while retaining the history and context of the original enquiry. Relevant information follows the customer across channels and interactions”.

Figure 20: Multichannel, multimodal or omnichannel? (by contact centre size)



30% of respondents described themselves in 2020 as omnichannel, with 15% assessing themselves as multimodal and 55% multichannel.

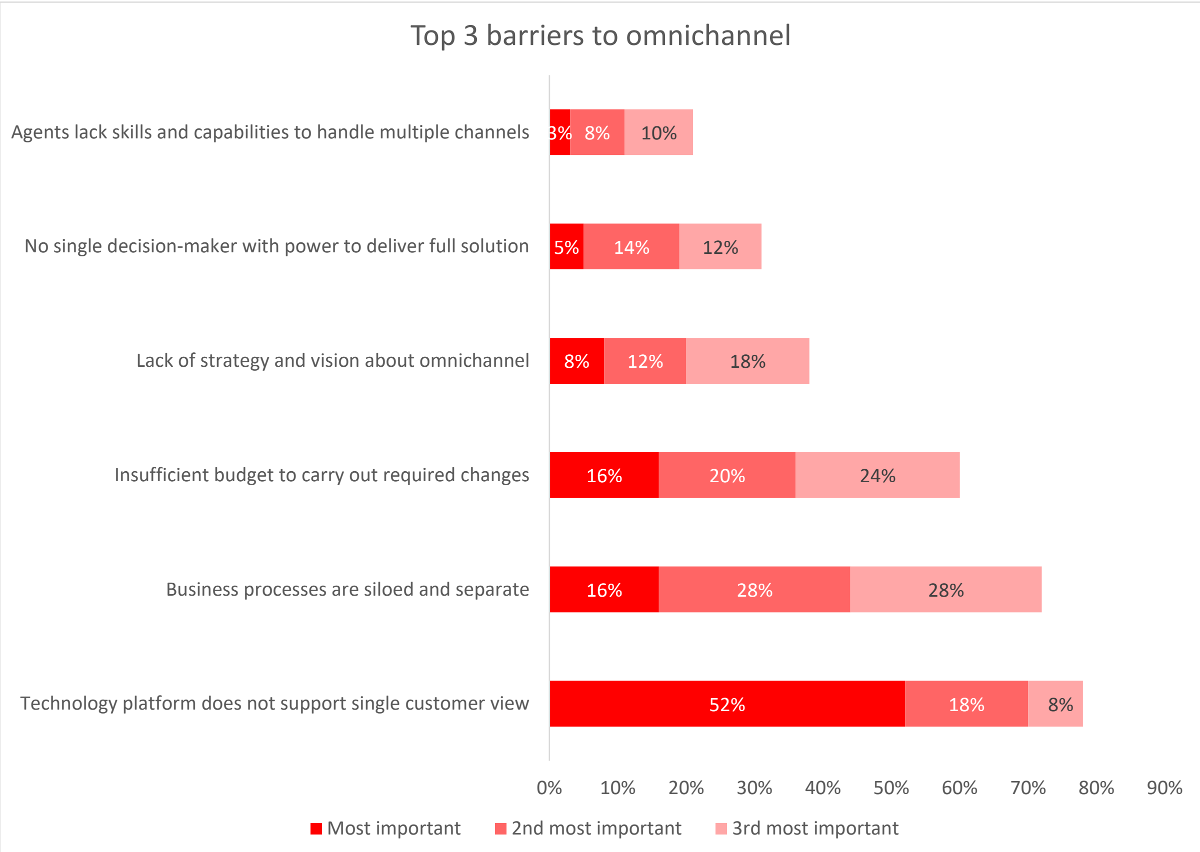
Survey respondents believe that there are two main barriers to providing true omnichannel customer care:

- the technology platform does not support a single view of the customer
- business processes are siloed and separate.

While these inhibitors to omnichannel are certainly formidable, they are not insurmountable. From a technical viewpoint, the starting point is to have a single integrated platform that is capable of identifying a customer regardless of the channel which they choose to use. This will mean evolving from the siloed, channel-focused point solutions that were put in place to handle a specific need, and using a services architecture that is extendable to different channels in the future. It is also important to have a master dataset for product and customer data which is a 'single source of truth' that can be drawn upon by any customer or agent through any channel.

A key aim of omnichannel is to provide a consistency of customer experience, and this requires access not only to the same master dataset, but also the same knowledge bases and business logic must be applied equally. There must be real-time data flow and updates between channels and databases, as without this, consistency is impossible.

Figure 21: Top 3 barriers to omnichannel



Concern that agents lack the skills and capabilities to handle multiple channels is not seen as one of the major inhibitors, as the majority of respondents do not feel that this holds them back from offering customers a full omnichannel experience.

Without a single platform or customer interaction hub, the complexity of handling multiple channels increases greatly each time a new channel, device or medium is added to the customer service mix. The only constant is that – regardless of the method they choose to communicate with the business – customers want accurate, timely information delivered in a form with which they are happy.

The challenges for the business are to provide a high quality of service which is consistent across the channels and to do so in a cost-effective manner. To do this, and break down the boundaries between contact channels that has been stifling the potential of non-telephony contact, a platform is required which automatically captures, processes, routes and reports on customer interactions and related activities based on a company's specific business criteria, providing a view of each and every customer interaction. Customer interactions through channels such as voice, email, web chat, instant messaging and activities such as work items must be handled according to business-defined processes and strategies, avoiding the problem of rogue interactions that are left outside normal workflows, or favouring one channel (often, voice) to the detriment of others.

The universal queue approach – which has been around for many years – can set priority levels to incoming calls, e-mails and chats, and offers the functionality to blend inbound and outbound calls into a single queue to allow agents to move between media as required. This approach also facilitates a single view of the customer across all channels, which is one of the key ways to improve the quality of service offered as well as improving the agent's engagement and morale.

Such is the theory. The reality for most businesses is that the requirements of their customer base, along with the opportunity to cut service costs have thrust numerous new channels into the customer service mix, leaving them with the headache of deciding how to implement and integrate new technology, recruit and train agents appropriately, and forecast and schedule the right staff to handle these new types of interaction. The easiest and quickest option has been to treat each channel separately, having agent silos and treating each interaction as being independent rather than part of a wider customer journey. If the customer changes channel, or contacts the business later about the same issue, they tend to have to start again from the beginning.

The "omni" element to omnichannel (meaning "all") can be understood as reflecting the customer's experience of interacting with the business: to them, an organisation's separate internal workflow and siloed systems are not just irrelevant, they are unseen. Omnichannel requires the breaking down of boundaries, not only between channels but also the ownership and management of the various relevant business processes and departments affected by customer interactions. This is why successful omnichannel implementations will require a senior management sponsor, with the authority and remit to make changes in any and all appropriate business units.

It's important to realise that omnichannel is not simply about implementing the right technology. While omnichannel obviously involves supporting multiple channels consistently along the customer journey, it is vital to understand and create the business process workflows that occur within each interaction type, not simply across customer service channels, but also reaching into the back office, financial and order management systems, the distribution process and any other business activity that is affected by the initial customer contact.

A true omnichannel approach is vital which offers the same high level of service and knowledge through each channel. Equally important is the freedom for agents to act in way appropriate to the situation: for example, if a 'high-emotion' interaction happens on social media, which can't be handled on that channel (e.g. it needs to go through security, or is too complex and lengthy for a non-voice channel), the agent should be given the license to place an outbound call to that customer in real-time, rather than advise them to call the contact centre. While this will impact upon the social media channel's service levels while the agent is away from it, this offers the opportunity to lock-in that customer's loyalty.

For contact centre operations traditionally run on a structured command-and-control basis, this may sound chaotic, but businesses have to decide if the occasional relaxation of their own procedures is an acceptable trade-off for providing the customer with something that they truly value. Agents need to be empowered to deliver support across however many channels are needed, and the training, technology and support to recognise when this is happening.

A single source of knowledge or 'truth' should be identified within the contact centre environment – for many companies, this is the CRM system – and make sure that other system components can integrate easily with this in order to access and amend customer records in real-time. A omnichannel platform or hub will be required that allows every channel to access and update the customer's master record as and when required, with real-time synchronisation being of vital importance.

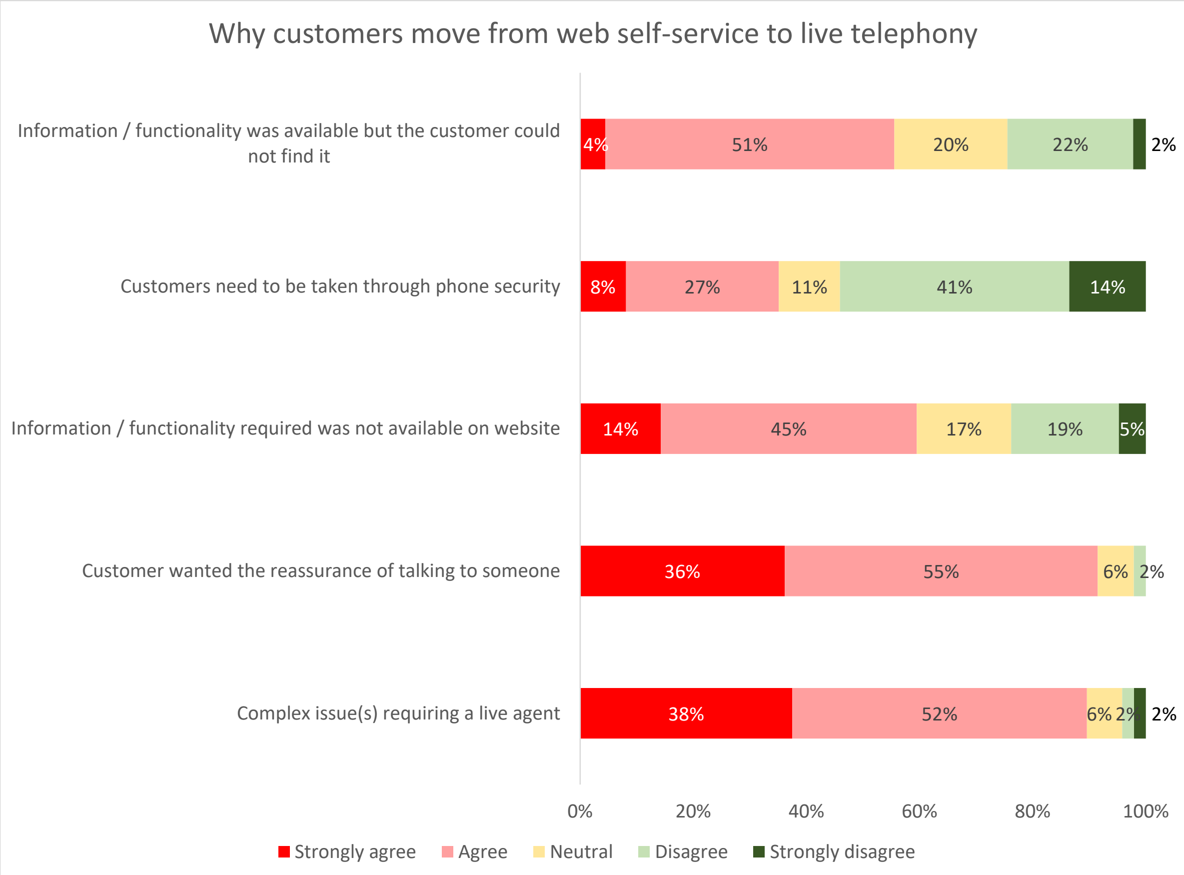
How do self-service and chatbots support agent engagement & empowerment?

- Reduce simple and repetitive tasks, freeing agents to handle more challenging and rewarding work
- Agents handle a larger proportion of calls from customers who actually need to talk to a person

For businesses, by far the major advantage to having customers use web self-service is the fact that the cost per automated support session is estimated to be between 40 and 100 times cheaper than a live call to an agent. There is also a big advantage for agents themselves, as effective self-service can take away much of the tedious, repetitive work such as balance enquiries, password resets and change of address requests.

The result of successful self-service is that the average request handled by an agent becomes more complex and challenging. The following chart shows the most important reason for moving from web self-service to live telephony is that there is a complex issue requiring a live agent.

Figure 22: Why customers move from web self-service to live telephony



91% of respondents also felt that customers wanted the reassurance that a live agent brings to a conversation.

59% stated that the functionality that the customer calling in required was not available online, but interestingly, 55% stated that they received calls about issues that could in theory be resolved online, but customers were unable or unwilling to do so. As such, businesses may consider that time spent educating customers in how to use self-service would pay benefits in the long term.

These findings suggest that many calls now being received by live agents are complex and/or come from a customer who has already tried and failed to use self-service. In either case, the agent answering the call will need high levels of engagement and to be empowered to help a customer who may well be frustrated or anxious about their issue.

Chatbots are a relatively recent addition to the self-service portfolio, being applications that run automated tasks and simulate conversation with the customers, having various levels of AI sophistication. They may be given a human avatar and personality characteristics, and include natural language processing, dialogue control, access to knowledge bases and a visual appearance that can change depending on who it is talking to and the subject of the conversation. Chatbot functionality is not only found in the web chat channel, but also other digital channels, such as social media and email or even voice self-service in the form of voicebots.

Some live chat solutions offer agents the opportunity to see what the customer is typing in real time, and enabling the agent to get a head start, while at the same time linking to the contact centre knowledge base in order to provide a list of most likely answers, which will increase the accuracy of response and decrease the overall time to serve.

While AI-enabled chatbots and self-service can improve agent engagement as a secondary effect, AI can have a much more powerful direct impact on this through the use of real-time analytics on the agent desktop.

How does AI-enabled real-time analytics support agent engagement & empowerment?

- Advises agents when their conversational behaviour is sub-optimal, and suggests ways of handling difficult interactions
- Provides real-time suggestions based on previously successful outcomes
- Brings in information relevant to the call, improving first-contact resolution
- Reduces the need for agents to search multiple systems and databases for key information
- Can initiate back-end processes and auto-fill fields after the call to reduce manual agent effort

Through immersion in vast quantities of historical data, AI can be trained to understand intent and recognise patterns, so that when a call is taking place it can draw upon this knowledge and provide real-time advice or action that has proven successful previously, such as:

- understanding of where an agent's conversational behaviour is falling outside of acceptable and previously successful norms (such as speaking too quickly or slowly, or in a monotonous fashion)
- an assessment of the meaning of non-verbal cues such as intonation, stress patterns, pauses, fluctuations in volume, pitch, timing and tone in order to support sentiment analysis
- understanding the actions and information that have been seen to provide successful outcomes in previous similar interactions, and relaying this to the agent within the call.

Real-time analytics can be used in many ways:

- monitoring calls for key words and phrases, which can either be acted upon within the conversation, or passed to another department (e.g. Marketing, if the customer indicates something relevant to other products or services sold by the company)
- alerting the agent or supervisor if pre-specified words or phrases occur
- offering guidance to the agent on the next best action for them to take, bringing in CRM data and knowledge bases to suggest answers to the question being asked, or advice on whether to change the tone or speed of the conversation
- escalating calls to a supervisor as appropriate
- detecting negative sentiment through instances of talk-over, negative language, obscenities, increased speaking volume etc., that can be escalated to a supervisor

- triggering back-office processes and opening agent desktop screens depending on call events. For example, the statement of a product name or serial number within the conversation can open an agent assistant screen that is relevant to that product
- making sure that all required words and phrases have been used, e.g. in the case of compliance or forming a phone-based contract
- suggesting cross-selling or upselling opportunities.

The speed of real-time analysis is crucial to its success: long delays can mean missed, inappropriate or sub-optimal sales opportunities being presented; cancellation alerts can show up too late; compliance violations over parts of the script missed out may occur as the call has already ended. However, it is important not to get carried away with real-time analysis, as there is a danger that businesses can get too enthusiastic and set alert thresholds far too low. This can result in agents being constantly bombarded with cross-selling and upselling offers and/or warnings about customer sentiment or their own communication style, so that it becomes a distraction rather than a help.

To alleviate this, businesses can run a clearly focused use case where ideas are tested with a control group and these ideas improved to ensure the agent is assisted and not overloaded. Pop-up notifications can be offered (where the agent can click a link if they want the information or ignore it if they don't) along with a list of links that the real-time engine has identified from which the relevant one can be picked. This leaves the agent empowered and in control while still providing immediate access to the information if required.

The effectiveness of real-time analysis may be boosted by post-call analytics taking place as well. For example, by assessing the outcomes of calls where specific cross-selling and upselling approaches were identified and presented to agents in real time, analysis can show the most successful approaches including the use of specific language, customer type, the order of presented offers and many other variables (including metadata from agent desktop applications) in order to fine-tune the approach in the future.

Additionally, getting calls right first-time obviously impacts positively upon first-contact resolution rates and agent engagement with their role, and through picking up phrases such as "speak to your supervisor", can escalate calls automatically or flag them for further QA.

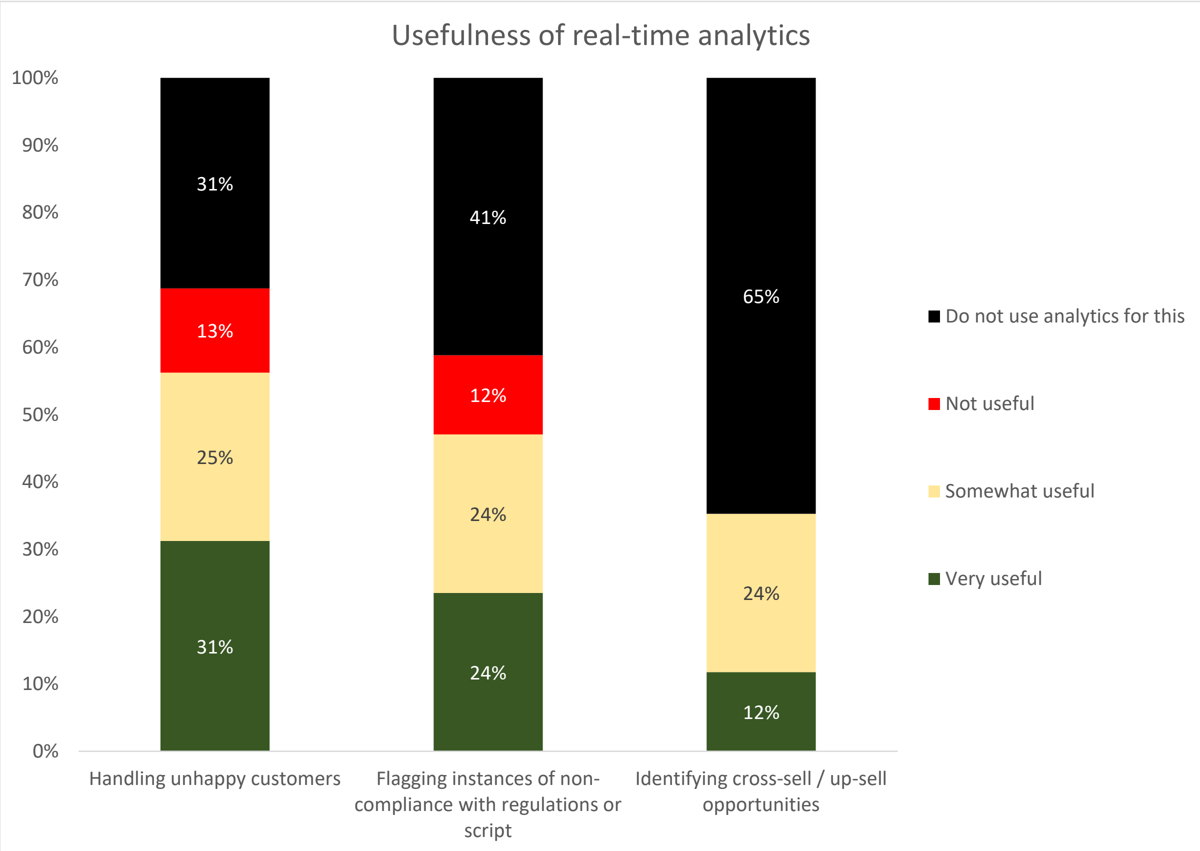
The usefulness of real-time analytics doesn't have to stop at the end of the call. For example, if integrated with other systems, the analytics application could screen-pop another application (such as a reservation engine) and auto-fill relevant details (such as the customer's stated appointment date), taking away some of the less interesting tasks that an agent has to carry out.

This proactive help reduces manual agent effort spent on data entry, search and context-switching between applications. It also increases the likelihood that the customer's question receives an accurate response, and increases the consistency of responses for all agents.

Survey respondents using real-time analytics report that it is particularly valuable for helping agents to handle unhappy customers and to some extent, identifying non-compliance.

The solution's ability to assist agents in identifying cross-selling and upselling opportunities has usually been less highly rated, but this seems to be changing.

Figure 23: Usefulness of real-time analytics



How does predictive analytics support agent engagement & empowerment?

- Identifies the likely reason for a customer calling, and suggests ways of handling the interaction successfully
- Routes calls to agents with the experience and skillsets most likely to be required
- Augments the agent screen with suggestions on next-best actions

Predictive analytics is a branch of analysis that looks at the nature and characteristics of past interactions, either with a specific customer or more widely, in order to identify indicators about the nature of a current interaction so as to make recommendations in real-time about how to handle the customer.

For example, a business can retrospectively analyse interactions in order to identify where customers have defected from the company or not renewed their contract. Typical indicators may include use of the words “unhappy” or “dissatisfied“; customers may have a larger-than-usual volume of calls into the contact centre; use multiple channels in a very short space of time (if they grow impatient with one channel, customers may use another); and mention competitors’ names. After analysing this, and applying it to the customer base, a “propensity to defect” score may be placed against each customer, identifying those customers most at risk. Specific routing and scripting strategies may be put in place so that when the customer next calls, the chances of a high-quality customer experience using a top agent are greater and effective retention strategies are applied.

AI can be applied across the entire customer journey, including sales, marketing and service, helping organisations understand customer behaviour, intent and anticipating their next action. For example, an AI solution may find a pattern that some types of customer are likely to search for specific information at a particular point in their presales journey, and proactively provide this to the customer before they have even asked for it. AI can also help agents with customer onboarding through predicting which customers are likely to require specific assistance.

While CTI-like screen popping is useful for cutting time from the early part of a call, the insight that this functionality provides to agents is often limited, and does not fully empower them to handle the call optimally. AI enables an instantaneous gathering and assessment of data from multiple sources to occur even before the call has been routed, which allows accurate prioritisation and delivery of the call to the agent most suited to handle it.

For example, an AI working in an airline contact centre may judge a call to be urgent if the caller:

- Has booked a flight for this day
- Rarely calls the contact centre, preferring to use self-service
- Is a frequent flier
- Is calling from a mobile phone rather than a landline
- Shares a similar profile with other customers who only tend to call for very urgent reasons.

In such a case, the AI may consider that there is a likelihood that the call is directly related to the flight that is happening today (e.g. there's a danger of missing the flight and the customer may need to rebook), and is able to move the call to the front of the queue and route it to an agent experienced in changing flights, and whose communication style suits the situation and customer profile.

Taking this a step further, the AI is able to augment the conversation with suggestions based upon what the agent is doing on the screen and also, through listening to the details of the conversation, is able to provide relevant information without the need for the agent to search for it, such as the next flight to the customer's proposed destination or the refund / transfer options. At the end of the call, the AI can then email or text the agreed solution to the customer without the agent having to do this manually.

How do knowledge bases support agent engagement & empowerment?

- Provide a single source of 'truth' that agents can draw upon confidently
- Encourages agents to share their own knowledge with others and reward them for doing so
- Having a knowledge source means that less experienced agents will not feel that they are incapable of doing their job

For many organisations, a knowledge base started off as a list of useful documents and files, which quickly grew into a wider, less coherent collection of information sources, requiring increased levels of expert management, amendments, editing, and deletion. However, the resources required to keep these knowledge bases up-to-date are very scarce, as the people within the business that have the capabilities and expertise to do so also have their own jobs to do. Very quickly, what started off as a useful and highly tailored information resource has mushroomed into an expensive, out-of-date and increasingly less useful collection of information of wildly varying quality. As noted in the previous section, AI can assist in the management of knowledge bases by feeding back successful outcomes, and noting when the answers provided did not meet the requirement.

On an ongoing basis, feedback from agents and customers will identify gaps in the knowledge base which will need to be filled by product experts. Some knowledge bases will require full-time, dedicated resource to manage them, whereas others will rely on automated systems making dynamic changes depending on callers' and agents' requirements. It is often the case that large businesses with many products and services to maintain will have numerous editors across many departments who can make suggestions, although it may only be a small handful of people who will verify and publish this information. Businesses may want to consider empowering certain high-level contact centre agents to create new entries based on their communications with the customer. Understanding which documents are being used the most allows the maintenance efforts be focused on the most important areas.

It is not just the publishing of information that is vital: crowd-sourcing of answers, and feedback on accuracy and success from the wider agent and user community will help the business to fine-tune the knowledge base and train the AI. Processes to gather this feedback should be put in place, and continually revisited to check effectiveness, and it's possible to add successful answers to the knowledge base very quickly if a response from an agent (for example, via email or web chat) has been marked to be successful, and AI is an effective method of doing this regularly and consistently.

Those who contribute timely and useful information – whether a customer or an agent – can be rewarded and recognised accordingly. People **want** to share their knowledge with others, and enabling them to do so easily is beneficial for all parties concerned. Businesses could measure the success of the knowledge management system by measuring the return on investment from call avoidance, by the rating or score given by readers of recommended articles, or through targeted customer satisfaction ratings.

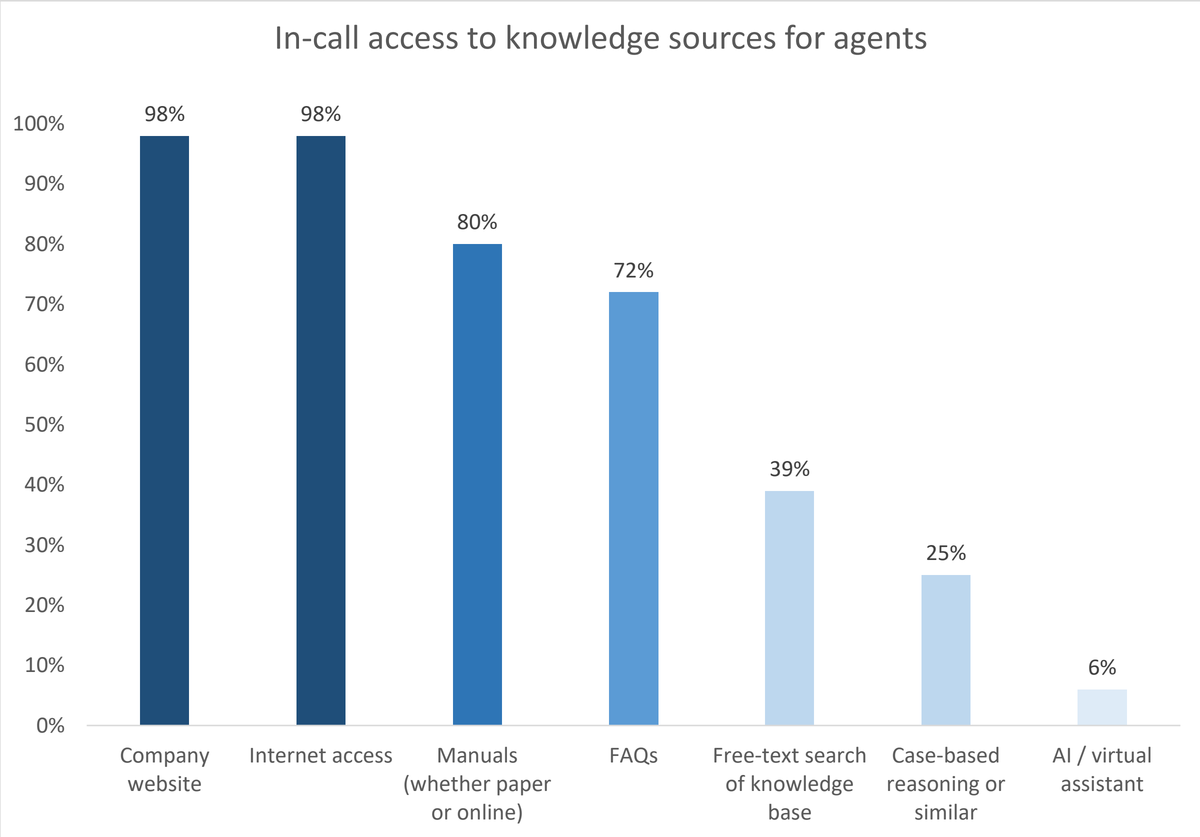
It is not only the customer that can benefit from this type of AI assistance. Agents cannot be expected to know everything about each product, issue or service, especially in high attrition operations where expertise is at a premium. Even where the knowledge is available to agents, they have to know where to find it.

Within the call, the typical agent is likely to have to use multiple knowledge sources, which will also take longer and run the risk (especially for new agents) of missing vital information that is available but perhaps hidden away. Robotic process automation (RPA) – which is considered later in this section – can gather knowledge sources and provide them to the agent in a unified manner, and any updates to this information can be shared automatically across applications and systems (including self-service), providing an immediate, up-to-date and consistent source of information. RPA can assist with agent tasks in the background, provided guided assistance at specific stages of the call, including dynamic scripting and compliance hints.

Within a call, the agent is likely to have to use multiple knowledge sources, which will also take longer and run the risk (especially for new agents) of missing vital information that is available but perhaps hidden away. Agent desktop automation can gather knowledge sources and provide them to the agent in a unified manner, and any updates to this information can be shared automatically across applications and systems, providing an immediate, up-to-date and consistent source of information. It can also assist with agent tasks in the background, provided guided assistance at specific stages of the call, including dynamic scripting and compliance hints.

The following chart shows the knowledge resources that agents have within a call. Finding, reading, assimilating and using information actually within a call as very difficult and is rarely done seamlessly. An application such as case-based reasoning, which prompts the agent to ask specific questions, drilling down to find the right answer, is very useful but only 25% of agents have access to this sort of dynamic application and only 6% have access to an AI-enabled virtual assistant. Most agents have to search around on a company website or FAQ page, or rely on a wide, unsupported search of knowledge bases or the wider Internet, hoping to get lucky.

Figure 24: In-call access to knowledge sources for agents



How does a unified agent desktop support agent engagement & empowerment?

- Having everything on 'a single pane of glass' means that agents are able to focus on the call rather than fighting their way through multiple systems
- Newer agents are more quickly able to help customers, improving their morale and reducing new hire attrition rates
- Repetitive post-call work can be reduced and errors minimised

Supported by knowledge bases and AI, the unified agent desktop lies at the heart of the cutting-edge contact centre. Many of today's contact centres use complicated, multiple applications, often only loosely-linked, which require skilled and experienced agents to navigate, let alone to manage interaction with customers successfully at the same time.

Even after the call is completed successfully, each system may need specific inputs from the agent in order to start the required back-office processes or to keep each database consistent with the others, and there is always the danger that even if the call has been completed successfully, opportunities to maximise revenues have been missed and agents find themselves spending long periods of time carrying out repetitive post-call work with the risk of making mistakes.

Figure 25: Use of multiple applications across vertical markets

Vertical market	Use of multiple applications
Finance	Customer accounts, CRM, product database, payment systems, email, quotation system (esp. insurance), complaints, other sister companies' systems (often through merger and acquisition), legal and compliance scripts, insurance claims
Outsourcing	Multiple screens and applications depending on customer requirements, not all of which will be familiar to agents
Retail & Distribution	Supply chain systems, distribution and shipping history, warehouse stock systems, CRM, customer history, pricing applications, payment systems, complaints, email
Telecoms	Customer accounts, cross-selling/upselling applications, CRM, field maintenance booking systems, real-time network status screens, complaints, payment history, credit/debit card applications, fulfilment systems, email
Utilities	Customer accounts, payment systems, utilities status systems (e.g. scheduled or emergency work being done on water, gas, electricity supplies), cross-selling/up-selling prompts, product information, maintenance and booking systems, complaints, email

The result is that even though a contact centre may be staffed with experienced, hard-working and skilled staff, its overall performance is suboptimal, leading to low customer satisfaction, unnecessary costs, decreased profits and low agent engagement. Agent desktop automation offers a way in which agents can be supported to assist customers through optimising the agent desktop without needing to rewrite systems or integrate deeply with multiple applications and databases.

With 96% of survey respondents requiring their agents to use multiple applications within a call, there are significant dangers around not asking or forgetting to key in information, or failing to initiate the correct follow-on processes or type in consistent data. The use of multiple applications will have a negative effect on training times and accuracy rates for new agents as well, and can lead to disengagement with their role. This is not merely an issue in large, complex environments: only 6% of respondents from sub-50 seat operations use a single in-call application.

In most cases where complex, multiple applications are used, they are necessary for the agents to do their job, so the question is not "How can we reduce the number of applications?", but rather "How can we improve how the agent uses the applications?". At the moment, due to complexity, expense and the sheer weight of constant change, applications are either integrated very loosely, or not at all. Agents are trained (or more likely, learn on the job) to switch rapidly between applications, relying on their experience to make sure they don't forget to do what's required. Agent desktop automation can gather the information and data relevant to the situation, and then start the back office processes required by the call's outcome.

Using live agents to handle this manually can have severe primary and secondary effects:

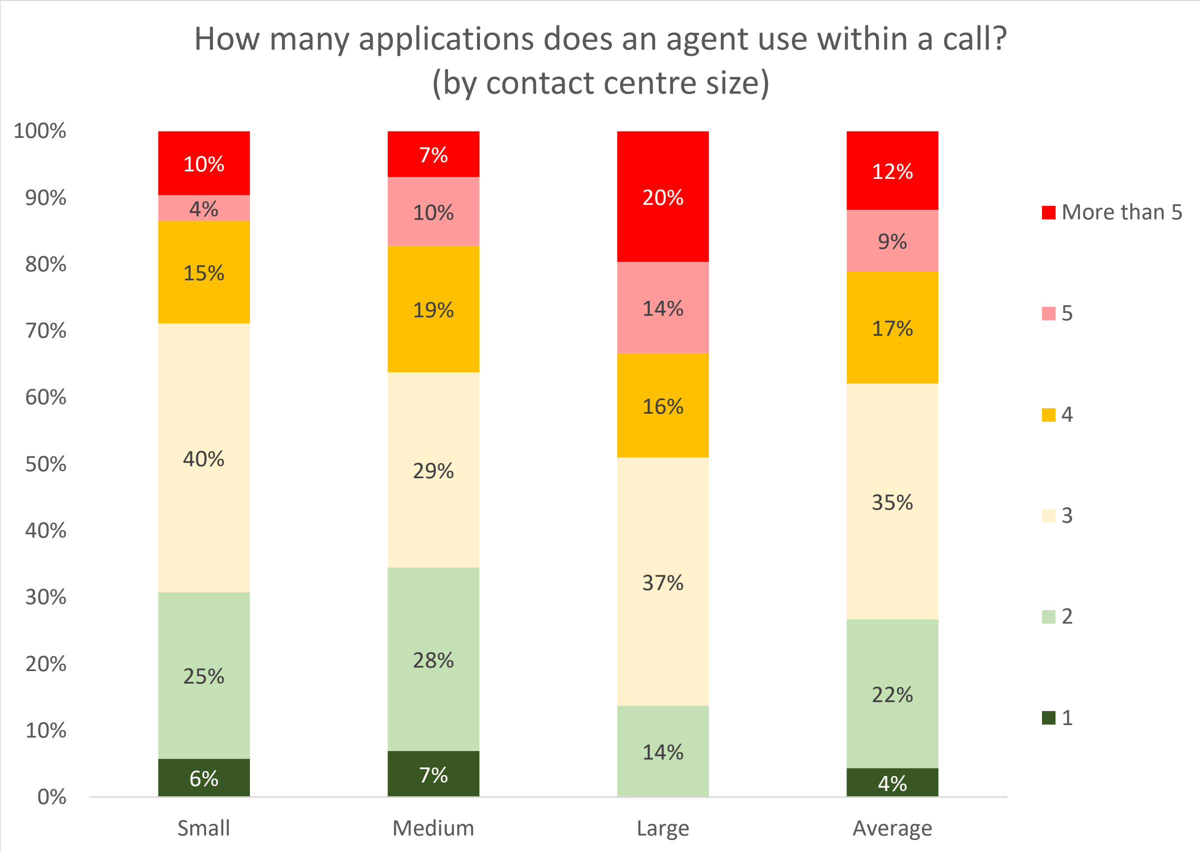
- Increased training costs
- Higher staff attrition caused by inability to complete tasks successfully
- Inconsistent data caused by keying errors or missed procedures caused by manual wrap-ups
- Increased call handling times
- Lower customer satisfaction and increased agent stress caused by long queues and unnecessarily lengthy calls
- Missed opportunities to cross-sell and up-sell
- Multiple open applications on the agent desktop can lead to system instability and lower performance.

Agent desktop automation solutions can remove the need for agents to log into multiple applications, assist them with the navigation between applications within the call, and make sure that customer data is gathered from the correct places and written back to any relevant databases without the need to navigate through multiple systems.

Within the call, dynamic call scripting helps the agent to provide the right information at the right time, seamlessly linking with multiple back-office applications and databases, providing only what is relevant onto the agent's screen. Depending on the experience or profile of the agent, what the customer is trying to do and any regulatory inhibitors, on-screen buttons can be enabled or disabled, or access to fields limited according to business rules. Furthermore, adherence to business processes can be assured by making the agent complete all of the required steps in the transaction (for example, adding call notes, reading disclaimers, etc.).

Only 4% of survey respondents use a single agent desktop, with 96% requiring their agents to navigate multiple screens and applications within the call, and 38% needing agents to handle four or more screens.

Figure 26: How many applications does an agent use within a call? (by contact centre size)



It is logical to hypothesise that using complex, multiple applications without any specific agent support will often lead to longer calls. However, this is not the end of the problem, as this type of work also tends to initiate requests for processes to be carried out within the back-office (e.g. initiating an engineer or sales visit, sending out literature, moving a customer request onto the right department with the right information, flagging a customer as a hot prospect for a specific marketing campaign, etc.).

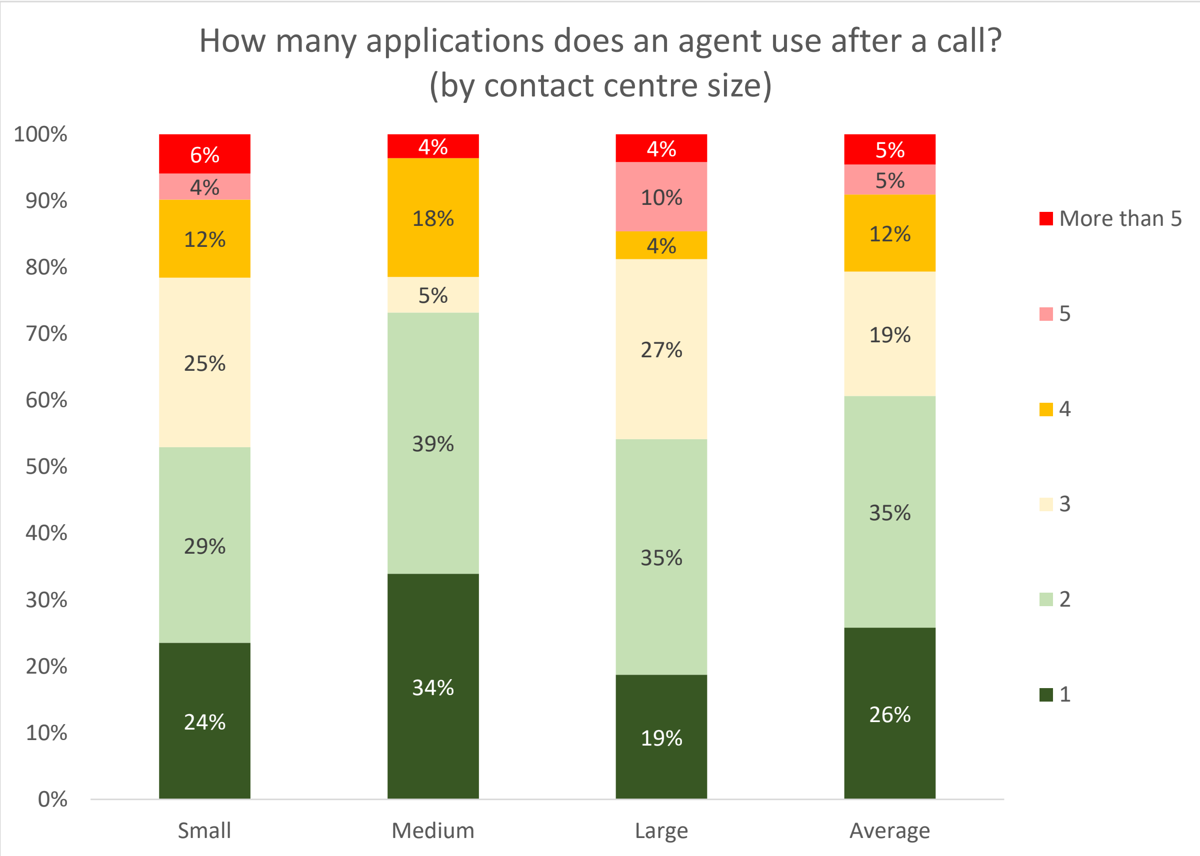
The post-call wrap-up stage wastes a lot of time and effort through sub-optimal manual processing of data. For example, a change of address request could take many minutes in a non-unified environment, with several separate databases having to be altered, which is itself a process prone to error, risking at least one extra unnecessary future phone call from the customer trying to put things right. Reducing wrap-up time through optimising the agent desktop is not simply a matter of writing consistently to the correct databases, although this is a key element. The contact centre also kicks off a number of processes elsewhere in the enterprise: it is the prime mover for sending out documents, instructing the warehouse to release goods, arranging deliveries, taking payment and many other key elements to a successful customer-business transaction. Automation solutions (including RPA) can handle these processes in a consistent, accurate and rapid manner.

Additionally, manual inputs involved in transferring data during wrap-up commonly lead to data entry and processing errors, causing an adverse effect on operational efficiency, contact centre cost, performance and customer satisfaction. Cost per call rises, productivity per agent declines and first-call resolution rates slip as more calls are escalated due to the complexity of the systems hindering agents, rather than helping them. So we can see that poor application integration and presentation at the desktop level has a direct and negative effect on those long-term contact centre strategies deemed most important and desirable, such as customer satisfaction, lower first-time resolution and reduced escalation levels, as well as agent engagement and satisfaction with their work.

Looking at post-call applications, agents generally have fewer to navigate in the wrap-up process, although only 26% of respondents allow agents to use a single application.

The need to enter information in multiple applications will tend to increase post-call wrap-up to a point where the agent spends a considerable amount of their time unavailable to take more calls. Historically, 10-15% of an agent's time is spent on post-call wrap-up.

Figure 27: How many applications does an agent use after a call? (by contact centre size)



The following table shows some key contact centre performance metrics that were analysed in the context of the number of in-call applications that agents use. It is important to note that although there appears to be a correlation between superior performance metrics and the use of a single user screen, this does not necessarily demonstrate causality: this pattern of statistics do not mean that it is possible to say definitely that the use of fewer applications within a call will in itself improve contact centre performance.

However, it can be supposed that not having to navigate through multiple screens and being given access to dynamic scripting that provides the correct information without having to search for it will encourage shorter calls and thus improved agent availability.

Figure 28: Selected performance metrics, by number of in-call applications used

Metric	Respondents using 1 or 2 agent applications within a call	Industry average
Average speed to answer	55 seconds	81 seconds
Service call duration	241 seconds	368 seconds

It is possible to estimate the overall cost of the time spent navigating between applications, and the figure is dramatically high industry-wide. Based on an average cost per inbound call of £4.55 and estimated UK inbound call volumes of 7.02bn inbound calls per year in an industry of 780,000 agent positions[3], the following chart and table show the cost per year of navigating between screens and applications during a call.

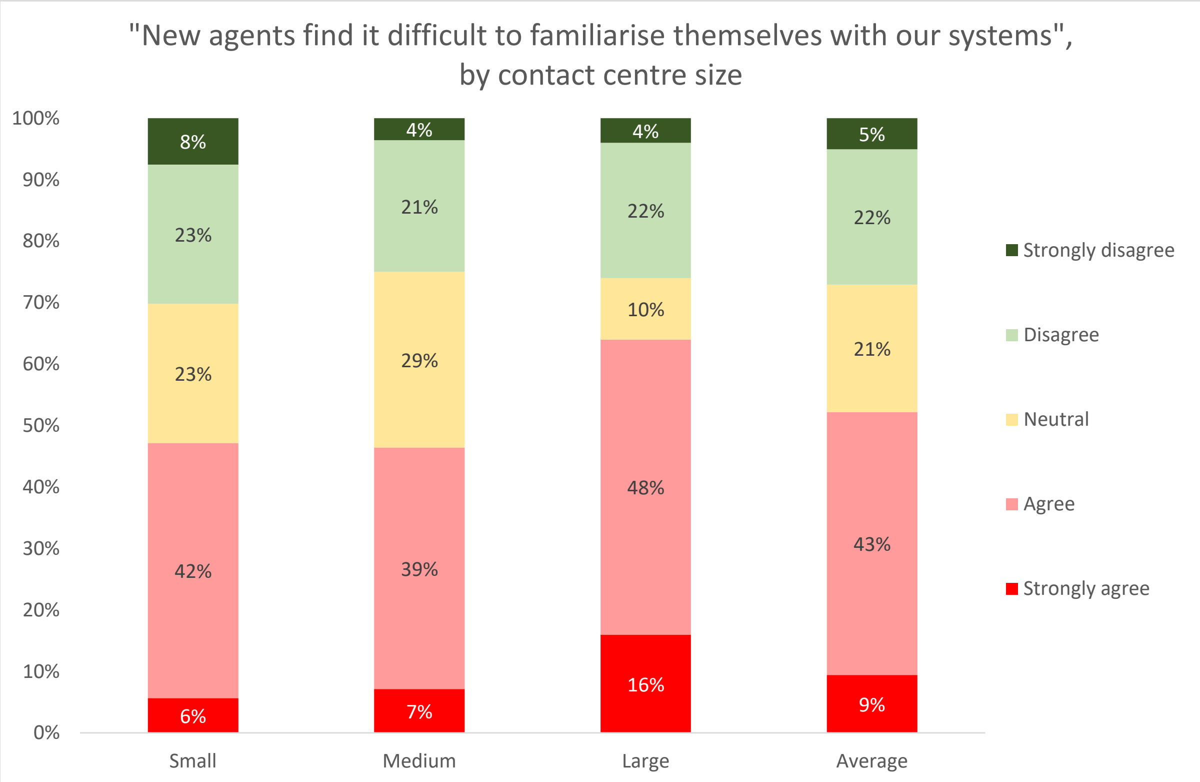
Figure 29: Annual cost of navigating between screens & applications within a call, by contact centre size

Contact centre size	£ cost per year
Small (10-50 seats)	£692m
Medium (51-200 seats)	£1.25bn
Large (200+ seats)	£2.39bn
Total	**£4.33bn**

[3] ContactBabel, "UK Contact Centres 2020-2024: The State of the Industry"

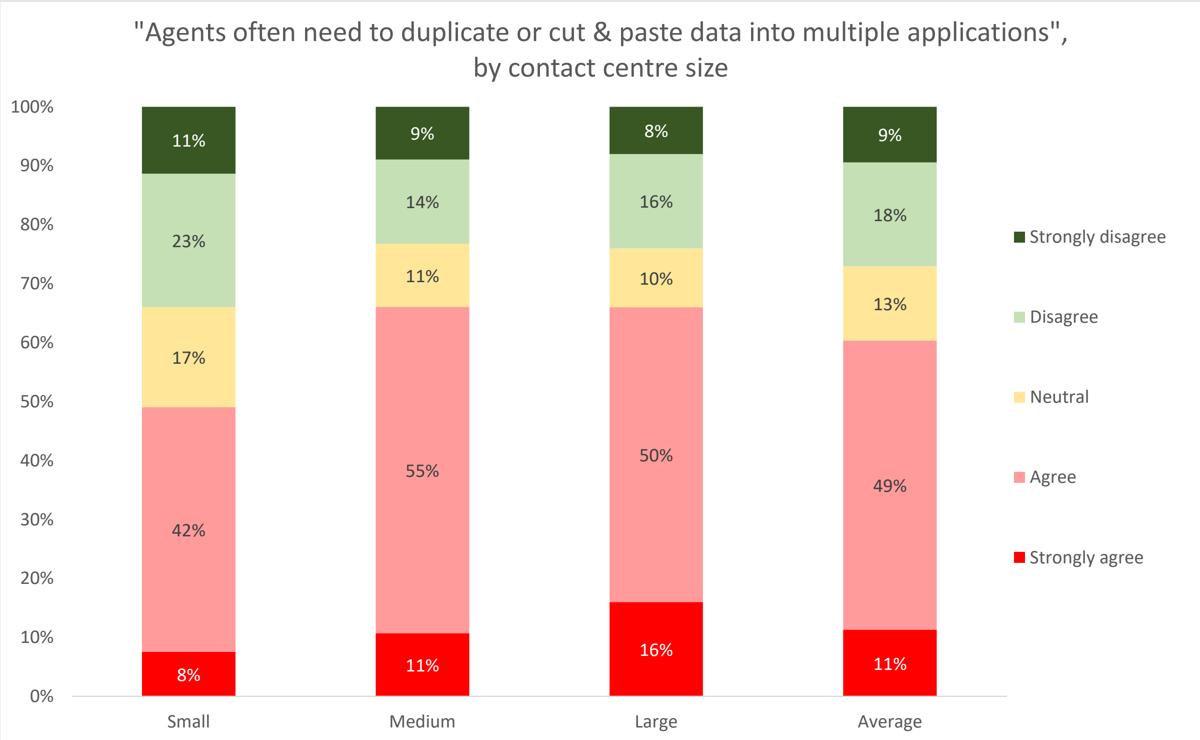
Evidence for the benefits of having a unified agent desktop does not stop with cost reduction. 64% of survey respondents from large contact centres agree or strongly agree that new agents find it difficult to familiarise themselves with systems when they first start in the contact centre, which leads to sub-optimal performance, errors in processes and low morale.

Figure 30: Agreement with statement: "New agents find it difficult to familiarise themselves with our systems", by contact centre size



60% of survey respondents agree or strongly agree that it is necessary for agents to duplicate or cut-and-paste data multiple times across systems, leading to wasted time, transcription errors and agent disengagement due to the tedious nature of the work.

Figure 31: Agreement with statement: "Agents often need to duplicate or cut & paste data into multiple applications", by contact centre size



One of the main ways in which this repetitive but necessary after-call work can be optimised for the business and the agent is through the use of robotic process automation (RPA).

How does robotic process automation (RPA) support agent engagement & empowerment?

- RPA can be a key part of the unified agent desktop seen previously, helping agents by handling routine and repetitive tasks
- Reduces average handle time and the pressure on agents felt when a long queue is present

A consistent finding from our surveys is that there is a real need to integrate processes and systems, providing up-to-date and accurate view of performance and issues. Yet the tools provided for the agent and their management have often been added piecemeal, requiring bespoke or partial integration at each step, growing the level of complexity to such an extent that the full potential of the solution is never fully realised.

A subset of agent desktop automation, robotic process automation (RPA) consists of digital software agents / bots that handle repetitive, rules-based tasks at high speed, with great consistency and accuracy. The RPA workforce acts in the same way as human agents, working at the presentation layer level rather than requiring deep integration with systems, replicating the work that live agents would be doing, but more quickly, consistently and without requiring any rest. RPA agents can input data, trigger processes, pass work onto other bots or humans as rules dictate and replicate data across multiple applications without making any copying mistakes.

RPA does not replace existing systems, it simply sits on top of existing logic and applications, using them in the same way that human contact centre agents or back-office workers would do. Processes and the necessary steps to perform a task are defined, put into a queue and the controller assigns various tasks to the robots. These robots can be monitored for speed and accuracy in the same way that a human workforce would be managed, with exceptions being flagged to human supervisors who can investigate why a particular task could not be completed as designed.

RPA can assist contact centres and back offices in numerous ways, including:

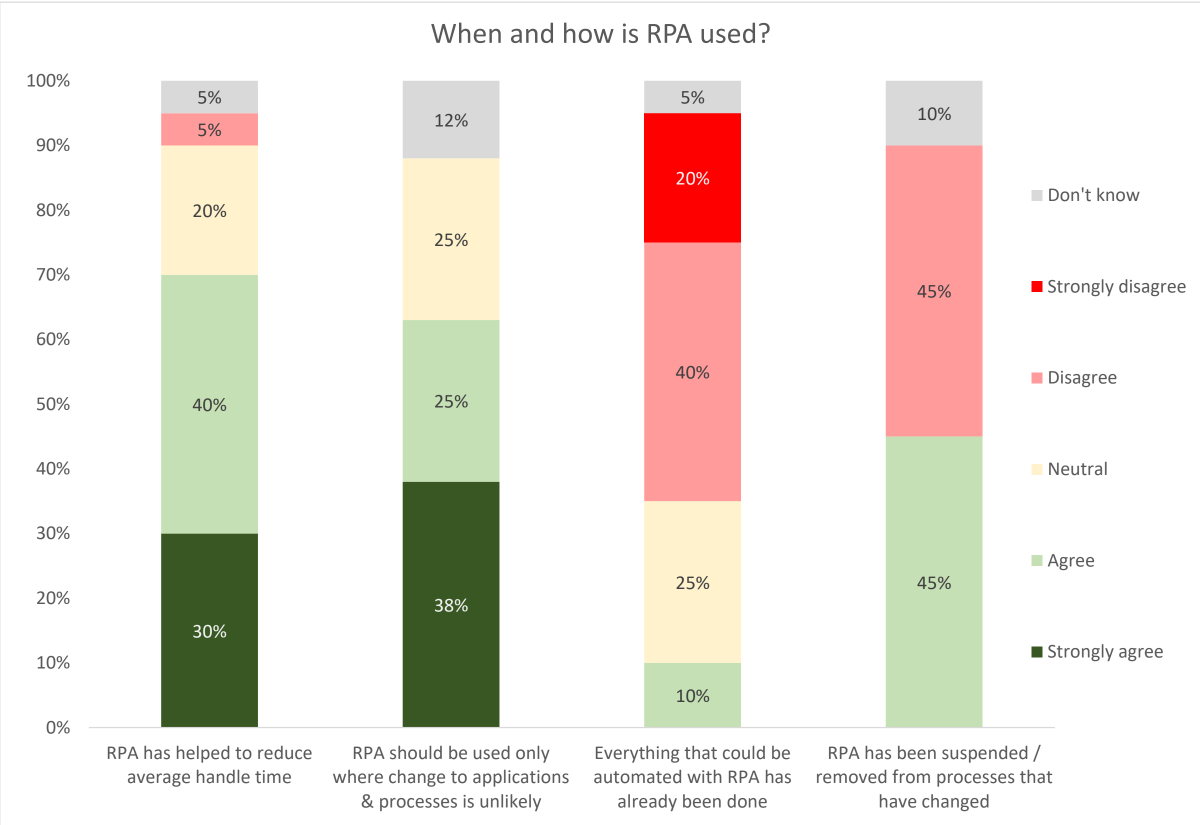
- Handling routine activities, such as the actions associated with a particular task such as change of address, including automated login to specific systems, field completion, screen navigation, copy and paste after a single entry is placed by a human agent in one application
- Triggering of processes based on call or digital interaction outcomes
- Record processes in ticketing systems
- Review documents and pass them onto the next stage in the workflow
- Validating customer account information
- Proactively sending updates to customers depending on the stage of the process.

However, RPA requires relatively static and repeatable business processes to act upon, and many businesses are wary of assigning large chunks of their customer support to robotic processes which will not be supervised or otherwise have the human touch. In such cases, Desktop Integration Platforms (DIP) can provide businesses with increased speed and accuracy through the creation of agent desktops that provide all (and only) the functionality required by the agent to carry out the task in hand.

The following chart shows when and how RPA is currently used by contact centres. There is general agreement that it has helped to reduce average handle time, and that it is very much suited to circumstances where changes to applications and processes are unlikely. For many contact centres, which can be very dynamic, this recommended requirement to remain static will not always be appropriate.

Having said that, most respondents believe that RPA has not yet automated every process that could in theory be automated. There is a mix of opinion as to whether respondents have stopped using RPA for processes that have changed, with half reporting having done so, and have not (i.e. changing their RPA functionality accordingly).

Figure 32: When and how is RPA used?



RPA is a scalable, non-disruptive way of making existing processes run more smoothly, quickly and accurately. However, it cannot improve sub-optimal or broken processes, so businesses looking to assist their agents and back office should consider whether this implementation provides them with the opportunity to take stock and consider whether the processes in place are as efficient and effective as they could possibly be, rather than simply automating them regardless.

How does workforce management support agent engagement & empowerment?

- Empowers agents to choose their own shifts and holidays
- Allocates the right work to people with the relevant skills
- Reduces unusable idle time which can otherwise be frustrating for agents

Workforce management solutions (WFM) have to deal with environments which have become much more complex in order to cope with the reality of the work that is being presented to agents.

For example, all agents require good listening ability, familiarity with keyboard and IT skills and a knowledge of the business they are working in, but more now need a pool of in-depth and specific skills to be available in order to satisfy customers fully, including:

- Familiarity with either specific customers (e.g. account management) or customer sub-sets (e.g. commercial vs. domestic products)
- Specific product or technical knowledge
- Right level of experience and empowerment for the customer (e.g. “gold-card” customers may demand single-call resolution, meaning senior agents should be available to take the call)
- Language skills (both in domestic and international markets)
- Ability to deal with digital interactions (either in real-time, such as web chats, or offline, such as emails).

The modern contact centre not only requires the basics of having enough people to answer interactions in a reasonable amount of time, but is increasingly demanding more sophisticated functionality such as the ability to forecast and schedule agents in near-real time, handle virtual contact centre, mobile and homeworking resource, accurately allocate staff resource across both digital and voice interactions, consider how the use of voicebots and chatbots will impact on interactions requiring a live agent, and increasingly include back office activities within scheduling as well where relevant.

FORECASTING

A great deal of unnecessary agent work can be removed by identifying the types of calls that are being received, and determining whether these could be reduced further up the line, in the departments whose work actively affects the volume and type of calls received, e.g. marketing or IT (for the website), or through the use of bots to handle relatively simple enquiries.

As such, workforce management is often used as part of an overall workforce optimisation suite, which can include quality monitoring, interaction analytics, HR management and training as well as the traditional workforce management roles of forecasting and scheduling, as all of these factors affect each other.

For example, understanding when and how other departments will be operating means that workforce management tools can be used to forecast and schedule accordingly (e.g. a new TV advert may trigger a wave of specific calls). Additionally, contact centre management is able to brief agents – via a desktop broadcast or smartphone alert at short notice – about the correct responses and issues, as well as changing IVR prompts and messages to provide answers to the simpler questions and managing agent skill-sets for relevant call groups.

SCHEDULING

Scheduling has moved far away from the traditional approach of simply making sure that approximately the right number of agents are available based on forecasts.

While the correct resource allocation is obviously still key to successful scheduling, the enlightened enterprise takes agent preferences and skill-sets into account, empowering them to do more of the type of work that they enjoy and are good at. The "standard agent" approach to solving resource issues (i.e. treating one agent the same as any other) will cause problems with both agent engagement and customer service levels. Most companies using advanced workforce management software will have between six and nine skill-sets to work with, although a few contact centres use as many as 50.

An increasing number of contact centre operations no longer work on strict shift patterns of a fixed length, as flexibility can be of benefit both to the organisation and the agent: the organisation can resource peak hours without risking high levels of idle time outside of this, and shorter shifts may fit in better with the work-life balance of the agent. The recent enforced rise of remote working gives an opportunity for agents to work more of the hours that suit them (for example, in the evenings, or split-shifts around childcare), flexibility which contact centres can then use to extend their opening hours without paying excessively for anti-social hours or full shifts in times of lower volumes.

Many WFM solutions now offer a self-service function to allow agents to state their preferred shift patterns, request time off, swap shifts and request overtime, leading to more engaged and empowered agents and much less manual work for the scheduler. The advent of cloud-based solutions and mobile smartphone apps means that agents can make requests wherever they are, improving employee satisfaction and keeping the WFM system more up-to-date than if they were restricted to doing this within the physical contact centre within their own working hours.

INTRADAY

In older versions of WFM, once the forecasts and schedules were set based on historical data and expectation, the opportunity for change was extremely limited and restricted to moving agents between queues and tasks manually: more of an art than a science. Today, many WFM solutions support rapid changes driven by actual interaction volumes. This is often known as 'intraday', a near-real time scheduling system based on actual demand for service and supply of agent availability, and relies upon flexibility from the agent and the enterprise, working together for the benefit of all .

For example:

1. The WFM system forecasts the likely volume of interactions through each channel
2. Resource requirements are forecasted, based on the agent skills required
3. Agents submit their preferences for working hours (they have contracted to work a certain number of hours each month)
4. Shift patterns are scheduled and communicated to agents, who have the opportunity to arrange shift swaps with other agents. Businesses may wish agents to be contactable outside of their shift, possibly through SMS or an app, so that any requested schedule alterations or short-notice requests to login can be implemented in a timely fashion
5. The WFM system alters schedules accordingly throughout the day, based on real volumes and service levels.

Intraday goes some way to resolving the underlying tension between employee and organisation concerning workforce scheduling, and as such can be seen as part of the broader move towards agent-centric workforce engagement management. It is in the enterprise's interest to have strictly calculated forecasts and exact allocation of resource, regardless of how this impacts upon the employee. Unsurprisingly, this leads to resentment and disengagement within the workforce, increasing attrition and absence rates. Intraday goes some way to empowering the employee, without putting the enterprise at a disadvantage. WFM solutions that are built with a flexible architecture capable of scheduling in small time-increments (e.g. minutes rather than hours) will support employees' needs more effectively without damaging service levels.

It can be beneficial for everyone to allow agents to change their breaks themselves, bid for shifts and choose their own vacation period through an app without having to run everything through the workforce planning team first. Of course, the service level must be protected and any changes only ratified if this is the case. Giving remote working agents access to these sorts of tool will promote trust and do away with any issues such as perceived favouritism, as well as protecting the performance of the contact centre.

It is important to understand that greater empowerment of agents over their working patterns is greatly beneficial to morale: rather than have to ask a supervisor or manager, they are to a great extent choosing their own hours, with the resulting benefit that they have greater buy-in to the process and are less likely to be absent, as well as reducing the time spent by supervisors in changing schedules manually.

There are a number of workforce management solutions that use their forecasting and scheduling functionality to identify periods in the working day where agents are likely to be underutilised and experience high levels of idle time. The identification of idle time is one thing: being able to recover unproductive time in the agent's daily routine and use this otherwise-lost capacity is quite another. A workforce management solution that has intraday capabilities can recover these small pockets of fragmented and useless agent idle time as the day goes on, aggregating this time into larger blocks that can be allocated to other productive activities such as training, coaching, back-office tasks, answering asynchronous communications such as email, or catching up on administration. This can go a long way towards using the agent time that businesses already pay for, but which could not previously be accessed. It also reduces the amount of dead time that agents have to experience in a normal working day which can paradoxically be a drain upon them, as it is not long enough to do anything useful but is long enough for them to disengage with the work and lose their impetus.

Having a more flexible WFM system should also widen the available pool of labour: whereas in the past, the nature of scheduling meant that full-time employees were preferred, being able to schedule in shorter time periods in near-real-time supports part-time workers, homeworkers, employees based elsewhere in the enterprise and seasonal workers.

How does using interaction analytics for quality assurance support agent engagement & empowerment?

- By analysing 100% of calls, the QA process is fairer and more accurate, helping to focus on the training requirements that are really needed
- Rewards can be based upon a full view of the agent's performance
- The most successful approaches to interactions can be identified and shared with other agents

As shown earlier in the report, interaction analytics can be used to support real-time agent assistance and the unified agent desktop. Post-call analytics also has a major part to play in effective quality assurance and agent engagement through the evaluation of large quantities of recorded interactions.

The number of interactions typically observed as part of a traditional QA model do not represent a statistically valid sample set. Most contact centres score a sample of interactions, which is then used to estimate the score for all interactions of the same type, for the same group or for the same agent.

When using a sample to make inferences about the entire set of interactions, larger sample sizes will consistently result in a more precise estimate. Using one or two recordings per week may be enough to facilitate an effective coaching session with an agent, but just a few interactions out of hundreds is not a fair and valid measure, especially when such a small sample is used to affect an employee performance review and compensation, or when the sample is being used to make critical and costly business decisions. This leads to the risk of the agent feeling that they have been harshly or unfairly judged, leading to disengagement and perhaps even unnecessary attrition.

If analytics is not being used, a coach will evaluate random examples (particularly the most recent calls so the topic is fresh on the employee's mind), spend time finding the 'right' call and risk end up spending more time searching than coaching. With interaction analytics, the coach can evaluate specific interactions that have been tailored to the coaching plan, including those with problematic workflows or topics. The agent and coach work from a scorecard based on 100% of the interactions in order to spot trend, meaning that there is more time for coaching.

Interaction analytics tries to take the guesswork out of improving customer experience, agent performance and customer insight. By moving from anecdote-based decisions, from qualitative to quantitative information, some order is put on the millions of interactions that many large contact centres have in their recording systems, improving the reliability of the intelligence provided to decision-makers. The need to listen to calls is still there, but those listened to are far more likely to be the right ones, whether for agent evaluation or business insight.

Organisations using interaction analytics can carry out an evaluation of chosen calls – for example, unhappy customers – the results of which can be then be fed back into the existing quality assurance process. These are then treated in the same way, without upheaval or any need for altering the QA/QM process, only improving the quality and accuracy of the data used by the existing solution.

Being able to monitor 100% of calls with 100% of agents means that it is possible to make sure that agents comply with all business rules as well as regulations. Linking this information with metadata such as call outcomes, sales success rates and other business metrics means that the most successful behaviours and characteristics can be identified and shared across agent groups.

Interaction analytics is of great potential value to a business in terms of discovery, compliance and business process optimisation, but the improvements that the outputs from analytics can offer to other elements of the WFO suite, such as agent performance and training should not be overlooked. Scorecards based on 100% of calls rather than a small sample are much more accurate, and support better training and eLearning techniques, and have great potential to cut the cost of manual call QA. Analysing all interactions also means that QA professionals are made aware of any outliers – either very good or very bad customer communications – providing great opportunities for the propagation of best practice or identifying urgent training needs.

Interaction analytics can be used to flag cases of talk-over, as well as silence detection. The former can be a source of irritation to the customer or an indicator of stress, and long silences can indicate lack of agent knowledge, although long system navigation times or delays in system response times can also cause this. The analysis of these types of call alongside desktop/screen analytics will identify which of these issues is really the problem, with the opportunity to reduce handling times as well as improving customer experience.

Interaction analytics also makes the training and coaching received by new agents far more effective and targeted. This is especially important for this class of agent, as many operations report that half of their overall staff turnover occurs in the first 90 days of the job, when agents are obviously less skilled or confident about their role or the organisation, and more likely to be disengaged.

Analytics can identify the types of behaviour – good and bad – that lead to successful call resolution or otherwise, and these can be presented in a targeted way to the new agent to fast-track them to a level of competency that should reduce attrition and improve quality. ContactBabel surveys show that most analytics users state that interaction analytics is very useful for identifying training requirements at an individual agent level, being one of the highest-ranking uses of analytics.

There is also increased interest in agent self-assessment of calls, which empowers them by allowing them to view automated quality scoring results and to request relevant training.

How does using gamification support agent engagement & empowerment?

- Agents can compete and be rewarded for behaviours and actions which are aligned with the goals of the contact centre and company
- Makes work a more fun place to be
- Provides immediate feedback to agents

The difficulty in keeping agents engaged, understanding and focusing upon the behaviours, actions and characteristics that are most helpful for the contact centre and the business, and the limited budget which most contact centres have for incentive programmes create a situation whereby an alternative approach may need to be considered.

Gamification is an approach taken to improving agent engagement, aligning behaviours and characteristics with those of the contact centre and wider enterprise: at the most basic level, it involves making work tasks into games. The contact centre is a particularly rich potential environment for this approach, as it contains many of the factors that can make gamification successful:

- opportunity for achievement, reward and recognition at an individual level
- the possibility of team-based and goal-based quantified success
- a large pool of competitors and team members, that can be segmented appropriately to make competition and teamwork more manageable
- clearly defined tasks and metrics that can enable direct comparison between individuals and teams, over time, with measurable improvements possible.

The next section of this report considers gamification in more depth.

CURRENT AND FUTURE USE OF GAMIFICATION

Many contact centre agents work in stressful environments for relatively low pay, doing work which may sometimes be repetitive. Depending on the nature of the calls, they may be dealing mainly with customers who have negative experiences of the company, which is unlikely to make the agent happier about representing the enterprise, especially over time.

The new agent, while often feeling uncertain about their ability to do tasks, is usually willing to learn and is engaged in their work. Assuming that the initial training period is effective, their competence will increase but there is a danger that some will become bored and cynical, which may in the longer term lead to high levels of agent attrition and correspondingly lower levels of operation-wide competence. As such, there is a twofold problem: lack of engagement at agent level leading to lower quality and productivity, and the corresponding costs associated with unnecessary agent attrition.

Gamification looks to meet these twin challenges with two solutions of its own: making work a more fun place to be, while encouraging the behaviours, competencies and characteristics that most closely aligned with the enterprise's own requirements through giving agents real-time feedback about their performance, the opportunities to improve themselves and to be seen positively by peers and managers with the attendant social and material rewards.

Through the process of awarding badges, points and achievement levels, gamification gives agents an opportunity to show their achievements and compete as individuals and part of the team. The goals in mind are set by the business, and these require a great deal of thought, as any agent behaviours and actions must be closely aligned with where the business wants to go. This is an area of particular potential risk for businesses: taking a simple example, rewarding agents based upon average call handling time so as to reduce cost could obviously lead to them dropping difficult calls or not answering customers fully in order to meet these targets. There is also a risk that the novelty of games will wear off, with rewards having to have a higher and higher tangible monetary value in order to keep people's motivation, so ongoing efforts must be made by management to keep games fresh and goals relevant.

It is also important to note that gamification – while providing feedback and rewards to agents on an individual level – should be used as part of a team or community experience, encouraging high performing agents to share their best practice and for all agents to be continually challenged and pushed to learn new skills and improve their own performance.

Contact centres that use gamification frequently report that most agents go beyond the required training schedule, completing extra units and developing skills further in order to accumulate more points and badges. In a heavily-incentivised sales environment, encouraging agents to take time off revenue generating activity to take training can be difficult, and this is a potential solution.

Gamification looks to increase agent engagement through:

- providing immediate feedback to the agent, who does not have to wait until the scheduled supervisory review to see how they are doing
- improving *esprit de corps* through the pooling of knowledge and collaboration within a group in order to achieve specific goals for which all will be rewarded
- cutting down on the amount of time required for new agents to become competent, providing real-time feedback in order to encourage positive behaviours
- reducing the amount of management time required to run incentives programs, and delivering them more fairly and objectively
- focusing upon and reward those characteristics and behaviours that are most closely aligned with the contact centre's and enterprise's own requirements.

This final point – encouraging agents to do what benefits the business – should be a key goal of gamification. As seen earlier in this report, many organisations are rewarding agents for behaviours which are not closely aligned with where the business needs to go, while ignoring those attitudes and characteristics that would actually support them in their journey, often because these latter are more difficult to measure.

Gamification can help businesses to support their objectives, and to achieve specific results. For example, steps to make gamification assist with achieving a company's business priorities could include:

- clarifying the enterprise's objectives
- identifying contact centre metrics that directly impact upon these objectives
- identifying the agent characteristics, behaviour and actions that impact these metrics the most
- developing a gamification strategy that can measure and improve these metrics, through motivating the agents to act in ways that support this goal.

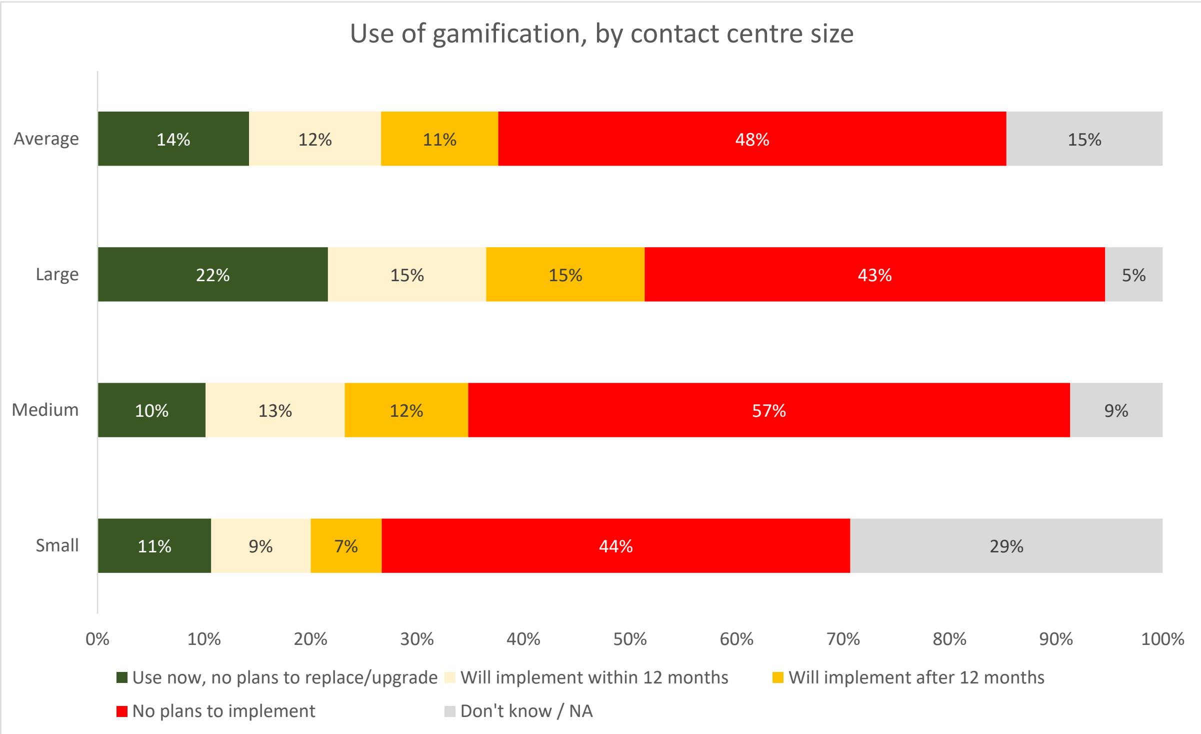
For businesses which want to achieve specific results, gamification can assist through:

- increasing the skills and competencies of new agents more rapidly, decreasing time to productivity by switching from formal, classroom lecture-based training into structured real-life work tasks
- further developing the skills of agents through encouraging and rewarding the completion of extra training courses and activities beyond what is required
- cutting agent retention through increasing agent engagement, and recognising and rewarding positive behaviours and characteristics.

14% of respondents currently use gamification within their contact centre operations, and a further 12% believe that they will implement this within 12 months.

The use of gamification is considerably higher within large contact centres, where 22% of respondents from large operations currently use it and 15% intend to implement it within a year.

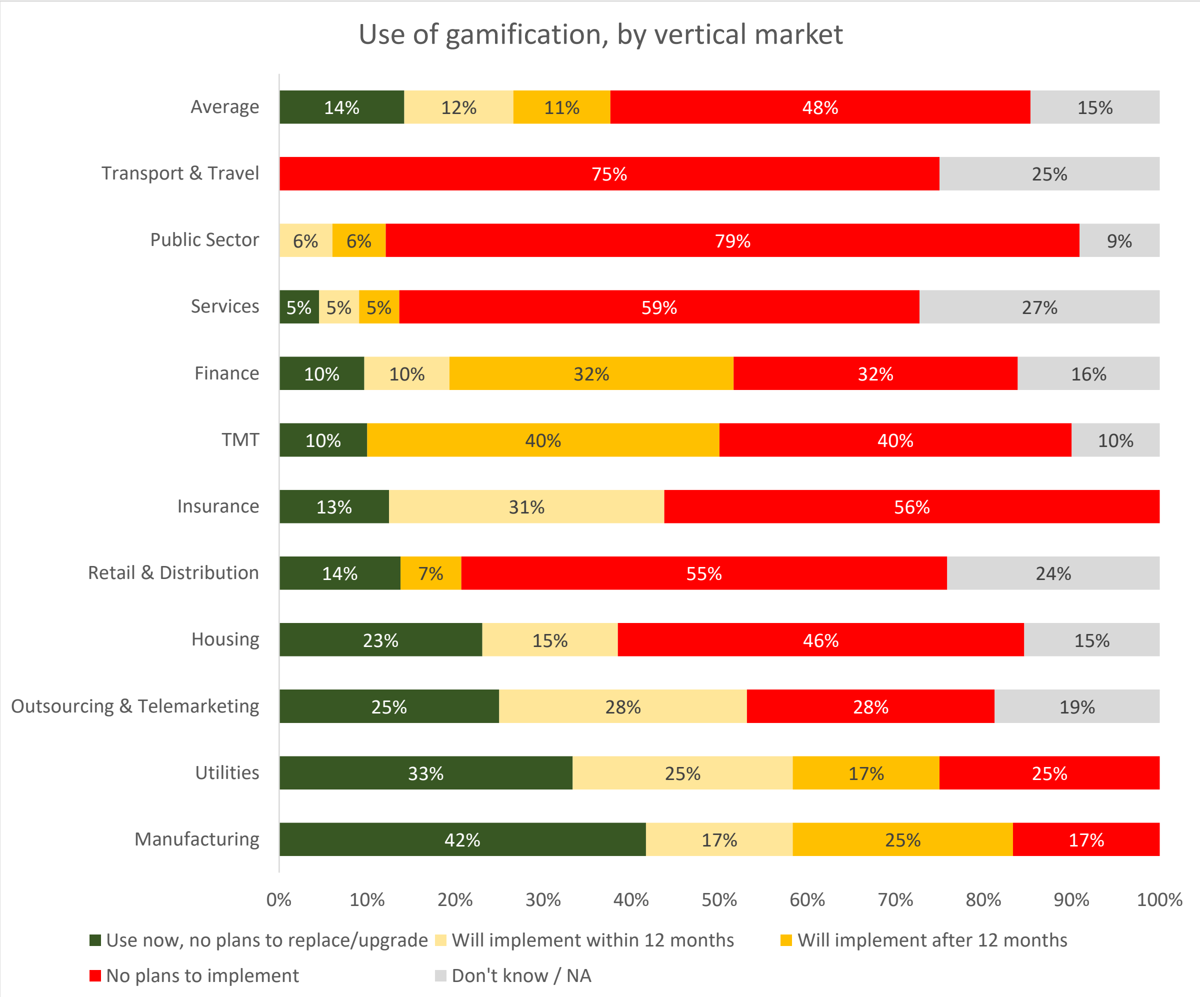
Figure 33: Use of gamification, by contact centre size



There is a danger in over-analysing data where the segments are too small, and this can be the case when considering vertical market implementations of a relatively nascent solution.

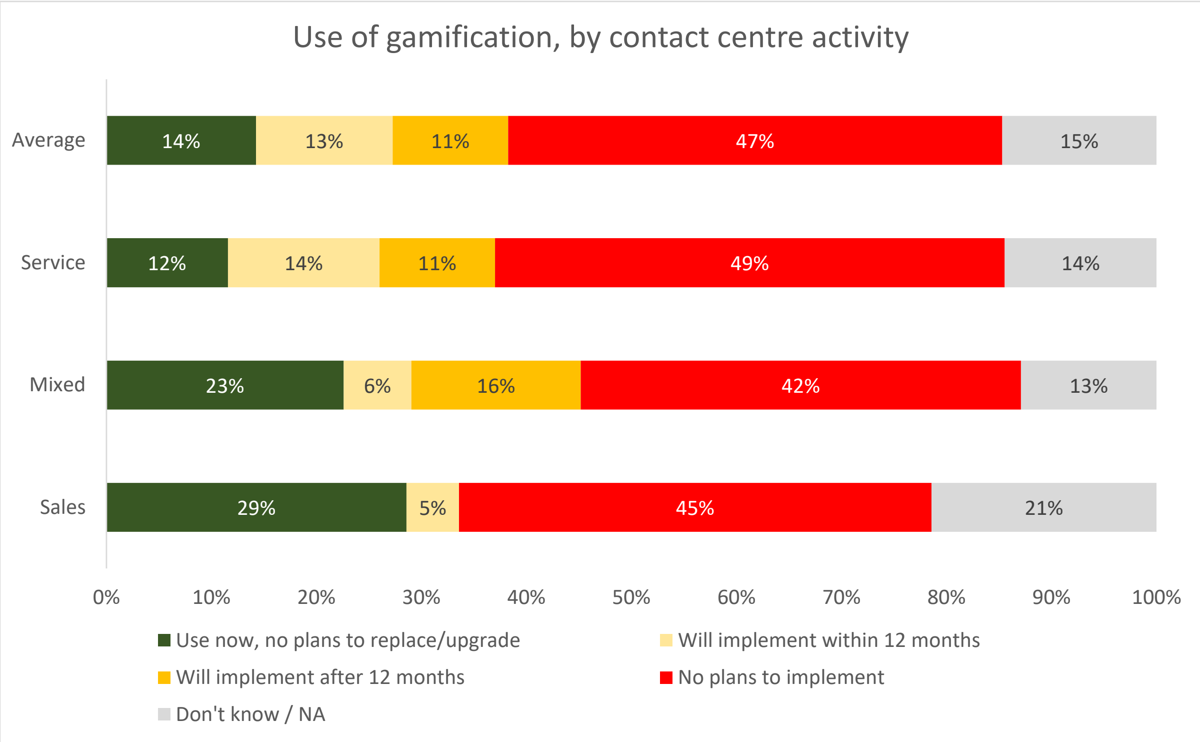
However, it is interesting to note that the manufacturing respondents from this year's survey are the highest current users of this solution, and the insurance and outsourcing sectors report the strongest interest in implementing gamification.

Figure 34: Use of gamification, by vertical market



Looking at the activity type of respondents, those working in the sales environment, which are already culturally used to the public, competitive practice of sharing sales targets and achievements, are much more likely to be using gamification today, although the relatively small sample size of pure sales operations involved in this survey should be considered. However, as this pattern is also found in US contact centres, it may well be the case.

Figure 35: Use of gamification, by contact centre activity



How does using performance management support agent engagement & empowerment?

- Encourages agents to focus on the metrics which are truly important to the customer and the business
- Agents are able to see exactly how they are doing without waiting for a formal performance review
- Hard data means that any performance review will be based on what actually happened rather than someone's opinion

The success or otherwise of contact centres has traditionally been measured by observation of key metrics, usually related to cost and efficiency: average call length, average speed to answer, % of calls answered within a certain time, etc. While these figures are a useful and still widely acknowledged and understood benchmark, times have changed. Many contact centres now try to measure the effectiveness of their operation by tracking metrics such as first-time call resolution and customer satisfaction levels, although there are no standard measures or agreements on what constitutes a satisfied customer or fully resolved call. This does tend to strengthen the hand of those who believe that because the contact centre can provide detailed data on call volumes and handling times, then that is what it should primarily be measured against, and ContactBabel research shows that agents are far more likely to be rewarded for meeting required operational metrics rather than customer-focused service metrics.

Management information systems are the contact centre management's eyes and ears, providing them with the tools and information to judge the effectiveness and efficiency of the operation. The results of its reporting capabilities may be output to wallboards, desktop displays (at management, supervisor and agent levels as appropriate), batch reporting and fed into real-time scheduling and forecasting functionality.

Depending on the type of work that they do, contact centres may consider focusing upon various measurements:

Internal metrics

Call duration / Average Handle Time: A typical 'old-fashioned' metric, which is generally going out of favour due to the acceptance that each call is different and should take as long as is needed. However, it is one of the easiest statistics to measure, and useful to use to work out cost per call.

Agent occupancy rate: The agent occupancy rate is calculated as the proportion of time in a given period that is call-time plus wrap-up, (that is, the proportion of time that each agent spends on dealing with the call itself and the actions deriving from it. A laborious wrap-up time caused by slow back-office systems or lack of familiarity from the agent's perspective can go some way to producing high occupancy rates, which looks as though the agent is constantly active, but which is actually negative for both business and customer.

Call throughput and abandonment rates: Understanding the types of call being received as well as tracking the number that are dropped can be translated into lost revenue within a sales environment, making a pitch for greater investment easier. With the use of callback, calls that would otherwise be abandoned can be kept alive, although at the cost of an additional outbound call.

Revenue per call / promise to pay: As many contact centres are now profit centres, understanding the effectiveness of the sales or debt collection efforts is vital to judging the success of the contact centre itself.

Call transfer rate: This metric can indicate training needs at the individual agent level, a failure in the initial IVR routing or a need to update FAQs or other information on a website (for example, a spike in this metric might be driven by a recent marketing campaign which has confused some customers, creating a high level of calls about the same issue). Tracking and analysis of call recordings in cases of high transfers should identify the issue.

Schedule adherence: Schedule adherence is a metric that looks to help with the fine-tuning of a contact centre's labour force, so that calls are answered swiftly, but that agents are not sitting idly waiting for calls. It is a metric that is of more importance to schedulers than to customers, although the impact of getting schedules wrong can be catastrophic for efficiency, cost and performance. The importance of adherence to schedule has only been included in this survey for the past two years, in a question later in this chapter which asked respondents which were the most important contact centre metrics. Surprisingly, it was said to be more important than key customer-facing metrics such as first-contact resolution.

Staff attrition rates: A well-publicised cost that senior management are very aware of, high levels of staff attrition are poisonous to the effective running of the majority of contact centres, causing excessive recruitment and training costs, lower average call handling quality and longer queue times due to inexperienced staff, as well as the vicious circle of lower staff morale.

Average speed to answer / longest call waiting etc.: This metric has a strong and demonstrable effect on customer satisfaction or frustration, as well as impacting on call abandonment, lost revenues and high staff attrition rates caused by excessive pressure. Average speed to answer is a metric which is easily measured, and forms a vital view of the contact centre's staffing levels as well as impacting directly upon the customer experience. As such, it is similar in nature to the call abandonment rate. Contact centres should of course consider the amount of time that a customer spends in the IVR segment of the call when considering the 'speed to answer' metric - as the customers themselves surely do so.

Cost per call: Although this is an attractive and easily-understood metric for senior management to view, there is a real danger that calls are closed too quickly and revenue and loyalty-building opportunities are lost. If a contact centre has many short calls (which may be better off being dealt with by self-service), this will produce a lower cost-per-call figure, which makes it look as though the contact centre is doing well, when the opposite may be the case. The same logic applies to first-call resolution rates.

Cost per call is a very complicated metric that is difficult to get correct. However, senior non-contact centre management understand how cost figures impact the business more than occupancy or call abandonment rates, although these have an impact on all parts of the business. At the most basic level, cost per call can be calculated by dividing the overall spent budget of the contact centre by the number of calls, although this does not take into account abandoned calls or situations where the customer has had to call multiple times to get a resolution (a situation which in fact brings cost per call down, although being negative to both business and customer). Neither does it take into account the effect of failure demand - where the contact centre cleans up after processes elsewhere in the business go wrong, leaving the contact centre to sort them out. As such, it should be viewed with caution.

Customer metrics

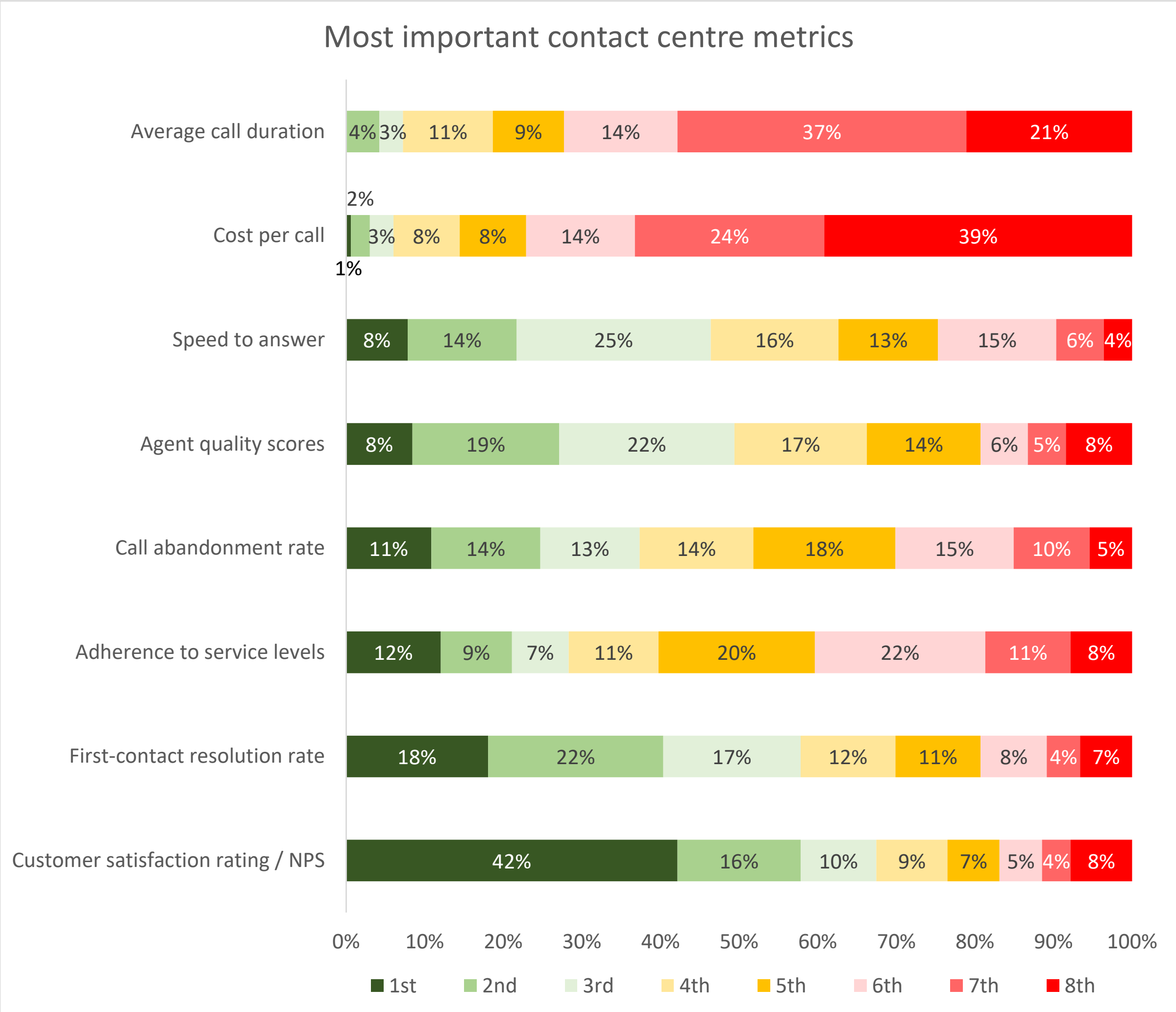
Customer satisfaction ratings: Customer satisfaction is seen to be directly linked to profitability through increased loyalty, share of wallet and customer advocacy. There is considerable debate about how satisfied (or delighted) customers have to be before it starts making a noticeable difference to the bottom-line (i.e. how happy does a customer have to be before they accept premium pricing strategies, and how unhappy do they have to be before they go elsewhere?). There's no easy answer, but high customer satisfaction ratings – at a reasonable cost for the business – are surely good for everyone.

Customer loyalty / lifetime value / churn rates: A central thought of CRM is that a business should focus upon keeping profitable customers, and growing unprofitable ones. A single figure for customer retention is not effective, as it does not include the types of customer churn, or the undesirability (or otherwise of losing such customers).

First-contact resolution: Improving first call/contact resolution (FCR) benefits customers (who are more happy / loyal / profitable / etc.); agents (higher morale; fewer frustrating calls); and business (lower cost of repeated calls; higher profitability): everyone wins. This can be hard to measure, as it is the customer, and not the contact centre that should be stating whether the issue has been resolved successfully.

Over the years, the importance of contact centre metrics has changed considerably. 15 years ago, average call duration and cost-per-call were considered to be the most important metrics, but respondents to recent reports consider them of minor importance compared to more customer-focused measurements.

Figure 36: Most important contact centre metrics



42% of respondents chose customer satisfaction rating as being the most important measurement that a contact centre tracks. Customer satisfaction is in large part driven by the other metrics shown here, and can be seen as a consequence of how these other elements perform.

In past surveys, first-contact resolution has been extremely important, with speed to answer often also chosen as a top 3 metric by more than half of respondents: both of these metrics are of huge importance to customer satisfaction (or the lack of it), and handling more calls effectively first-time is key to improving customer satisfaction and reducing repeat calls, which will impact positively upon queue lengths.

Agent quality scores are of course important to the customer, as the quality of interaction is a vital part of customer satisfaction. However, most agent quality scores are marked against scorecards that are created inside the organisation which are not always closely aligned with what the customer wants from an interaction.

Similarly, adherence to service levels and schedule is important to the smooth running of the contact centre, without which high-quality customer experience cannot exist, yet from the customer's perspective, the effectiveness of the interaction is driven by its result, rather than on whether the agent is meeting internally-set metrics.

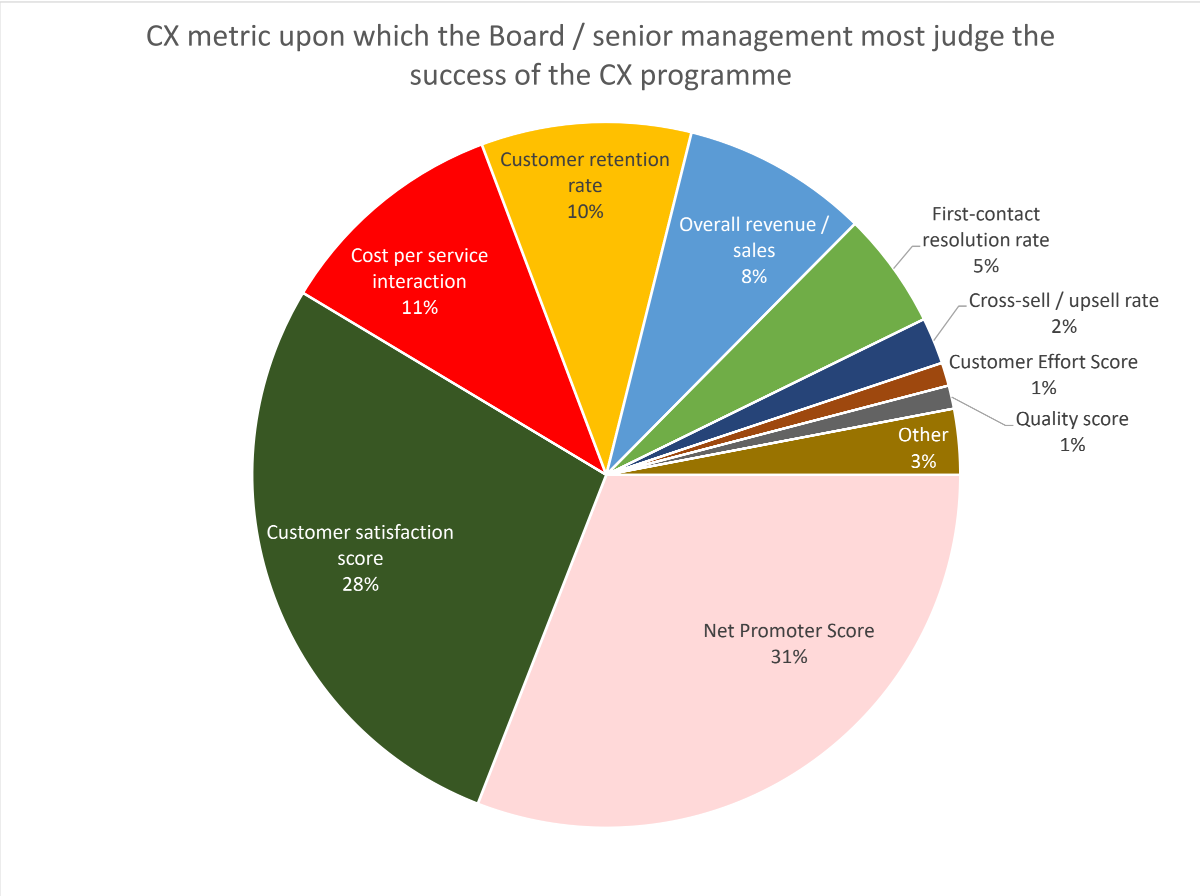
Survey respondents were asked to pick a single customer experience metric upon which their board or senior management team most judged the success or otherwise of the customer experience programme.

There was a wide mix of responses, with NPS and customer satisfaction score accounting for almost 60% of responses.

Interestingly, despite customer effort score being stated earlier as one of the most useful CX benchmarking metrics, only 1% of respondents stated that it was the CX metric considered most important by the senior management team.

Of even greater note is the fact that first-contact resolution rate was identified as being the key CX metric for senior management by only 5% of respondents, despite both the customer and business survey results earlier in this report showing clearly that first-contact resolution was the most important factor in influencing customer experience.

Figure 37: CX metric upon which the Board / senior management most judge the success of the CX programme



THE IMPACT OF AGENT ENGAGEMENT & EMPOWERMENT

Increasing agent engagement and empowerment should lead to measurable improvements in multiple areas. This section looks at some of the metrics and outcomes that can be positively impacted by greater employee engagement.

AGENT ATTRITION RATES

How can improved agent engagement & empowerment affect agent attrition?

- Engaged and empowered agents are much less likely to look around for alternative work
- New agent attrition is often a problem: providing effective training and supporting them with unified systems and knowledge bases can reduce this
- Making agents feel competent, trusted and confident will help reduce agent attrition

The modern contact centre requires different people than has traditionally been the case, driven by skills and behaviours aligned to the needs of today's customer, and the business's desire to improve the customer experience. With contact centre salaries creeping upward at a glacial rate (and actually dropping in real terms), finding and keeping people of the right calibre is more difficult than ever.

For many years, attrition has been one of the greatest challenges facing the industry, and one which has rarely been addressed with much in the way of a truly radical approach. The economic downturn of 2008 onwards reduced voluntary attrition greatly, but recent years' data shows that this was a temporary respite with attrition remaining around 20% on average, and 1 in 6 operations experiencing annual attrition of over 30%.

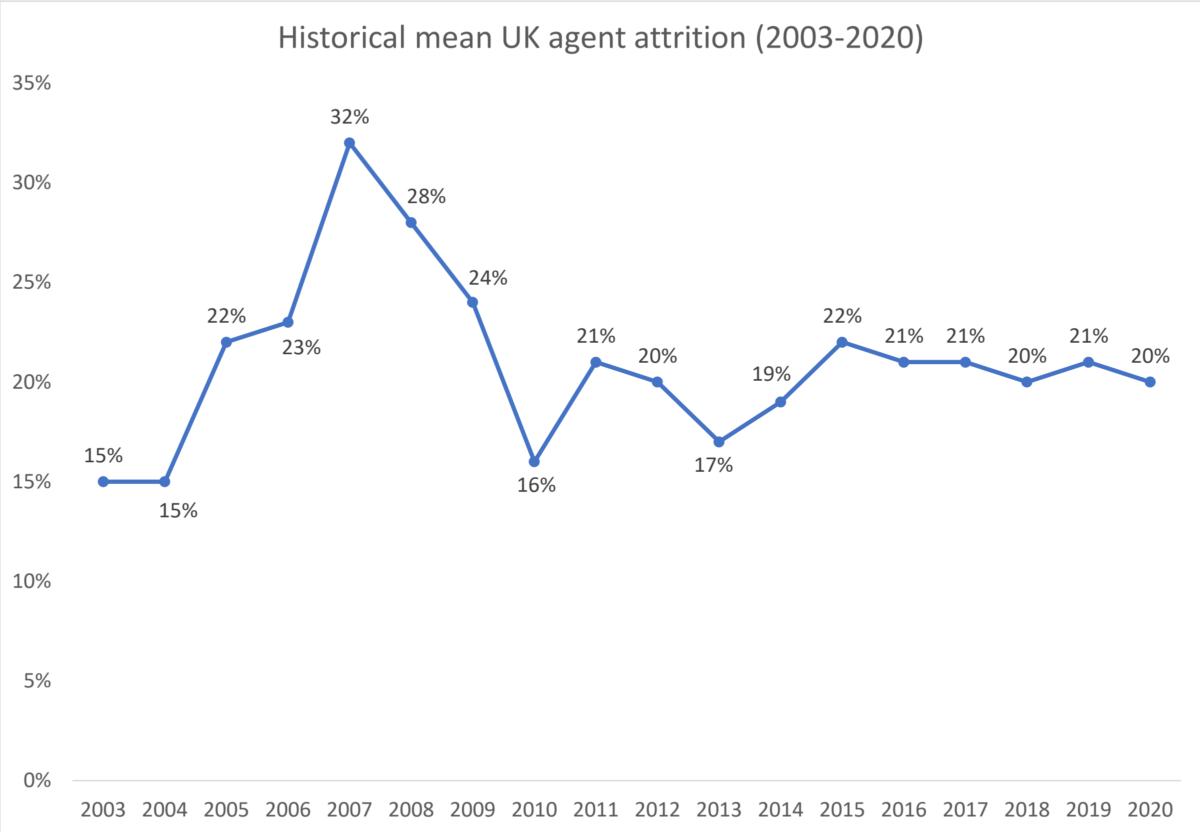
Staff attrition in small doses can be good for a contact centre, bringing in fresh blood and enthusiasm. However, high levels of staff attrition have some serious side-effects:

- Increased recruitment and training costs
- Decreases the average agent competency as there are so many 'learners'
- Can decrease the quality of the customer experience, as the agent may not know how to answer the query correctly first-time
- Adverse affect on contact centre performance indicators, including first-time resolution, call transfer rates, queue time and call length
- Bad for the morale of the remaining staff
- Inexperienced staff are more likely to miss cross-selling and up-selling opportunities
- Increased pressure put on team leaders and experienced agents
- Difficult to bring on-board new systems and ideas, as the agents are struggling with what is already in place.

In the mid-2000s, staff attrition rates jumped from the mid-teens to well over 30%. Driven in large part by the drop in alternative employment driven by the widespread economic downturn and banking crisis, attrition dropped sharply for a number of years, slackening to a mean average of 16%.

In 2011, respondents reported attrition rising, to a mean of 21% and median of 15%. Since then, the mean has steadied around 20%.

Figure 38: Historical mean UK agent attrition (2003-2020)



Larger contact centres are more likely to have high attrition rates, with survey respondents in large operations experiencing median staff attrition rates of 20% on average, compared with 10% for the sub-50 seat operations and 15% for 50-200 seat contact centres.

It is generally acknowledged that outbound customer contact is a very difficult, high-pressure job, which leads to stress and burnout, and thus more likely to see high levels of attrition. Historically, there has been an acceptance that large volumes of outbound calling will often come at the cost of high staff attrition, and that this is something which just has to be managed, and outbound respondents will tend to be more geared-up to cope with high staff turnover. Recent years have found this pattern to have broken down to some extent, but the mean and median for outbound operations is still somewhat higher than for inbound contact centres.

Improving agent engagement and empowering staff to serve customers more effectively means that some of the drivers for agent attrition are weakened (for example, not feeling valued in the role or being unable to make a consistently positive difference to customers).

How can improved agent engagement & empowerment affect agent absence?

- Engaged agents feel like an important part of the team, so are more likely to make the effort to come into work. This is particularly seen in small operations, where agents know that their colleagues will have to work harder if they're not there

- Being able to choose their own shifts through workforce management can help with feeling engaged and that the organisation is aware of their particular requirements

In a tightly-run contact centre where costs and performance are closely managed, significant levels of staff absence can cause major problems with contact centre performance and the customer experience. Even just a slight increase in absence rates can mean a major difference to how well the contact centre performs on that day. Staff end up overworked and stressed, and more likely to take time off as a result. Morale suffers, which increases staff attrition and overwork, thus creating further absence.

Absence has many reasons – a poor working environment, workplace bullying, an unoptimised schedule which makes impossible demands on staff, lack of leadership, low morale, unsociable hours, repetitive tasks and of course the pandemic – the list goes on. Staff absence is a vicious circle, each part of which feeds into another, usually leading to higher attrition rates, greater costs and poor service.

There are many causes of unnecessary absenteeism, including:

- The absence of a recruitment process that allows operations to identify unreliable applicants
- Poor front-line leadership: many team leaders are just not able to manage their teams and help prevent absenteeism, a fault of incorrect training and/or recruitment at this level
- Low morale in the contact centre driven by excessive pressure, uninteresting work or feeling undervalued.

There are also other factors that influence absence, including:

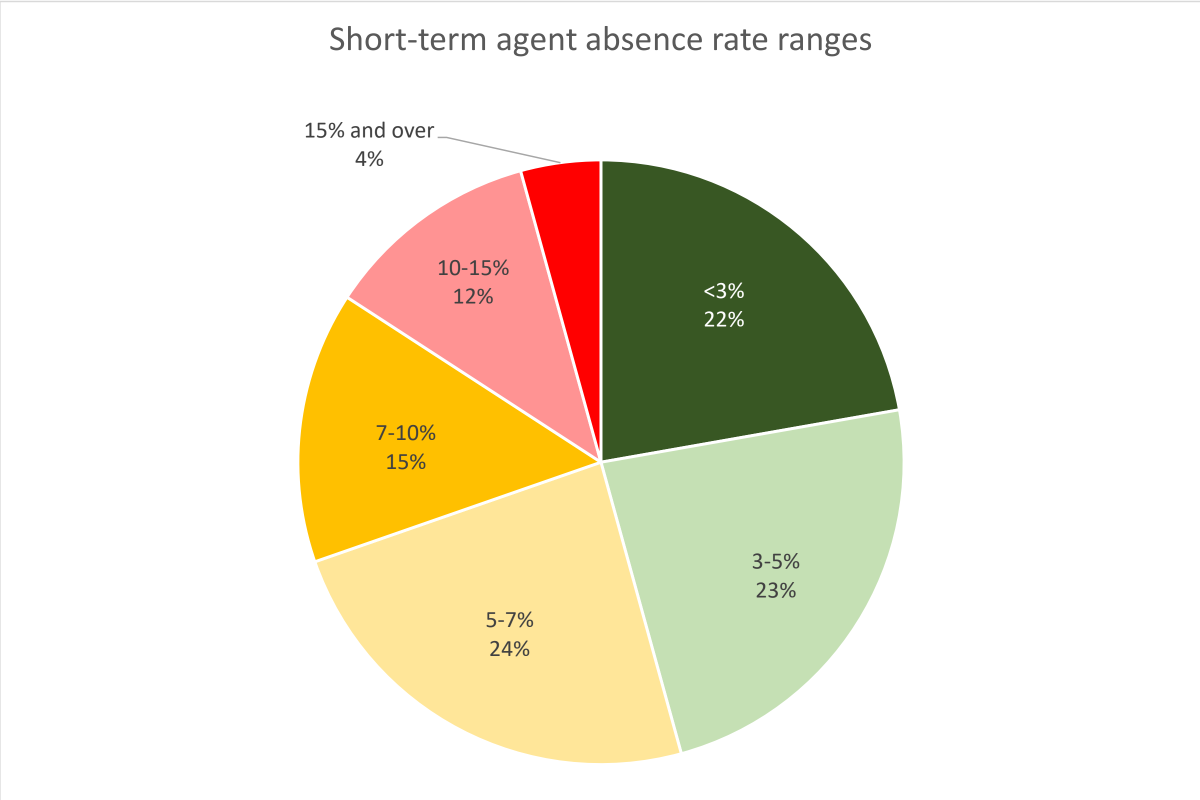
- Mandatory overtime and unsociable hours
- Lack of schedule flexibility and choice
- Insufficient mentoring or supervisor support, especially during the transition period after training
- Large team sizes (20+ per team)
- Cancelled team activities like 1:1 coaching due to heavy call volume.

SHORT-TERM ABSENCE

Short-term (no-show) absence is the average number of agent days lost through short-term sickness and unauthorised absence as a percentage of contracted days annually.

The mean average for short-term staff absence is 5.7%, with a median of 5.0%, similar to last year's figures.

Figure 39: Short-term agent absence rate ranges



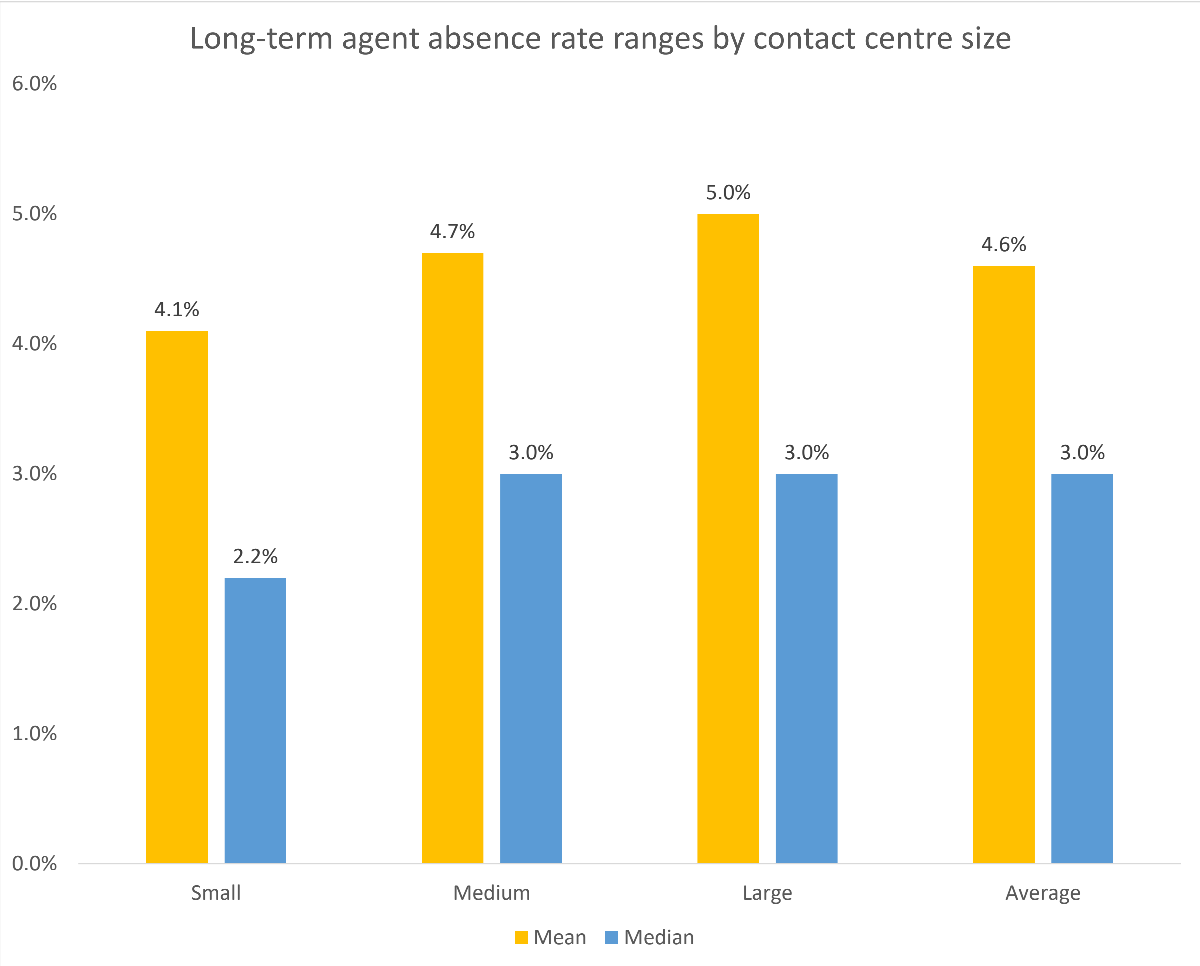
NB: a range of "3-5%" includes all results from 3.00% to 4.99%. "5-7%" includes all figures from 5.00% to 6.99%, etc.

LONG-TERM ABSENCE

Long-term absence is defined in the questionnaire as absence which includes long-term sickness, maternity leave, sabbaticals and other long-term absences where the business expects the absence, and is able to plan for it.

Long-term absence rates seem to increase somewhat with the size of the contact centre.

Figure 40: Long-term agent absence rate ranges by contact centre size



Inbound operations report somewhat higher long-term absence rates than outbound operations.

This pattern is mirrored in service vs sales environments, where long-term absence is a little higher in service operations.

How can improved agent engagement & empowerment affect first-contact resolution?

- Agents who are empowered through the business's customer service culture and supporting systems are more likely to want to take ownership of the customer's issue until it's resolved
- Being able to handle a customer's issue entirely means that the agent feels more competent and a valuable member of the team

Most of the contact centre world has moved on from the ruthless focus on call throughput and call duration that characterised many operations a decade or more ago. It can be stated with some confidence that first-contact resolution (FCR) is one of the keys to a successful contact centre: research shown in the next few pages shows that the respondents from both business and customer surveys state that first-contact resolution is one of the key metrics driving customer satisfaction and experience. Logically, it seems that to improve customer satisfaction, a business has to improve first-contact resolution rates.

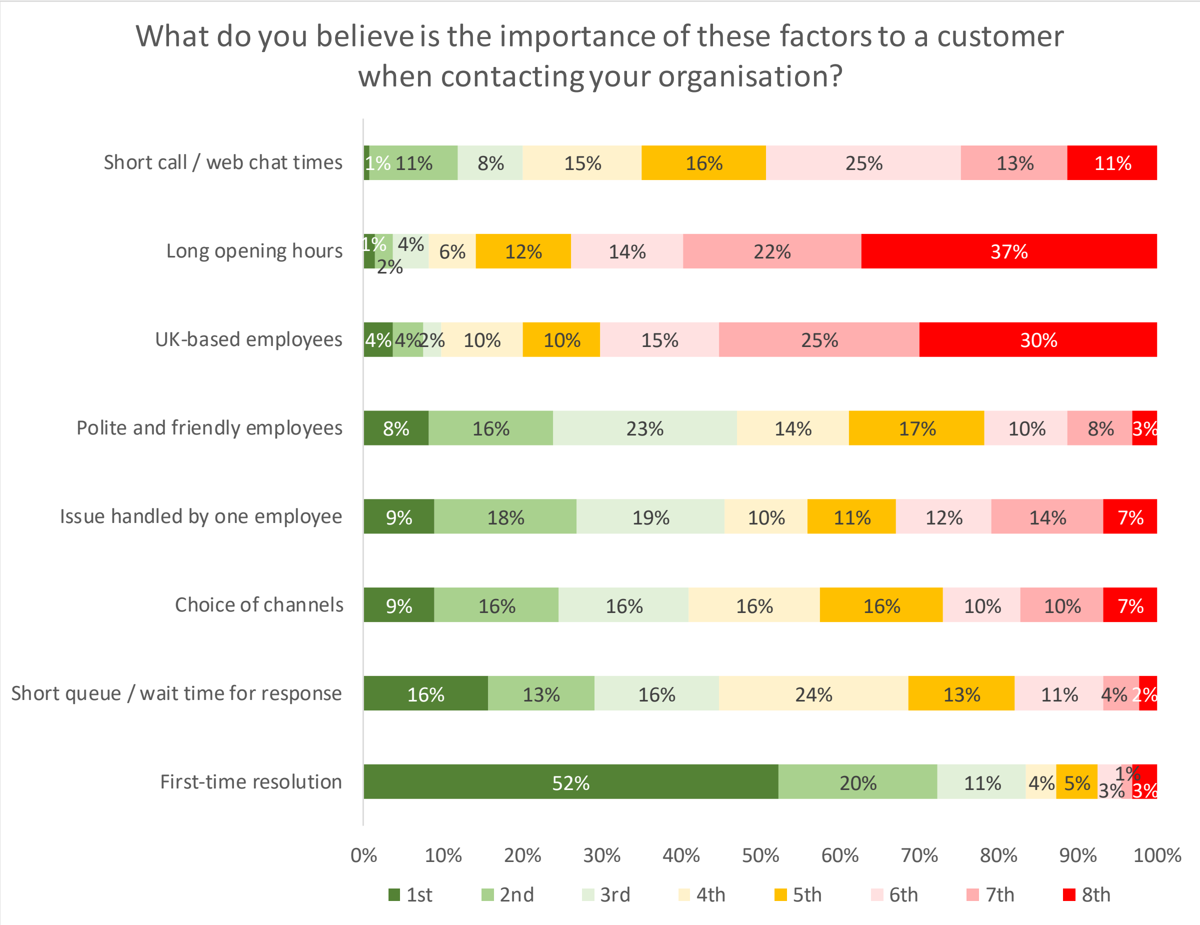
The ability to understand a query and deal with it in a reasonable timeframe at the first time of asking is the key to a contact centre's success, reducing the overall number of contacts while providing the customer with a good experience which will impact on the company's overall performance. It also has a positive effect on the agent's morale and engagement (and thus, staff attrition and absence rates) and increases the chances of a successful cross-sell and up-sell being made. Little wonder that the first-contact resolution metric has grown hugely in importance: unlike many other metrics, it works for both customer and business – a true 'miracle metric'.

However, it can be problematic to quantify accurately. This risks the metric being downplayed, especially as it is not simply a matter of producing a monthly report from ACD statistics, particularly as it is as much a measure of the entire business's success rather than just an internal contact centre metric. In addition – as with any single metric – excessive focus on achieving perfection can have a negative impact elsewhere.

It is difficult for an organisation to be confident about which of the many elements that go towards a great customer experience are actually the most important, and consequently should receive the greatest investment and resource. The following chart looks at the importance of key factors which occur within the customer experience when a customer contacts an organisation, from the perspective of the business and also from the customer.

Organisations were asked to rank by importance eight factors that could be said to impact upon customer experience.

Figure 41: What do you believe is the importance of these factors to a customer when contacting your organisation?

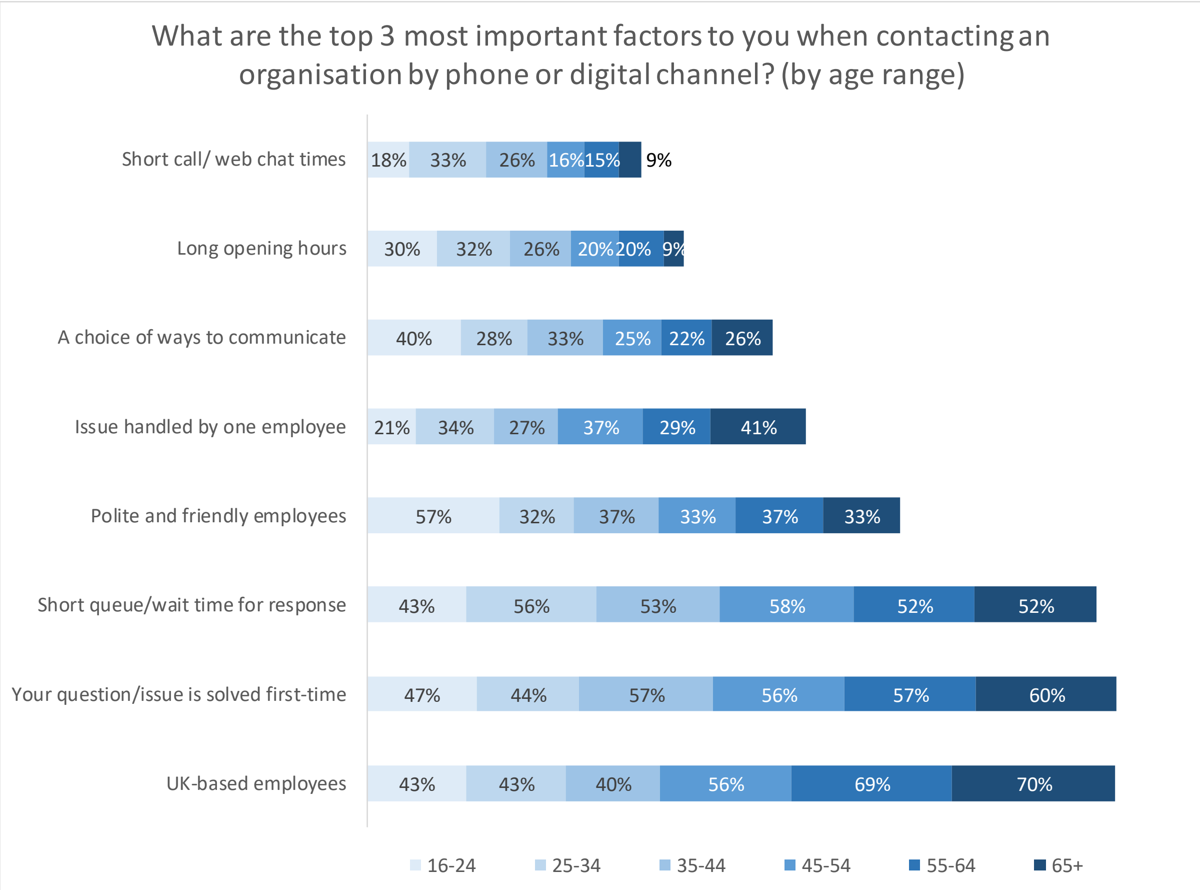


As with many past ContactBabel surveys, first-time resolution was clearly seen as being the most important factor impacting upon customer experience, with 52% of respondents ranking it in first place, and a further 31% placing it within the top three.

ContactBabel carried out a survey of 1,000 UK consumers, one of the purposes being to identify any differences in opinion between organisations and customers about what were the most important customer experience factors when contacting an organisation.

As such, consumers were asked to state which were the top three most important factors to them when contacting an organisation, with the same factors presented to them that had been offered to organisations within the business survey in the previous chart.

Figure 42: What are the top 3 most important factors to you when contacting an organisation by phone or digital channel? (by age range)



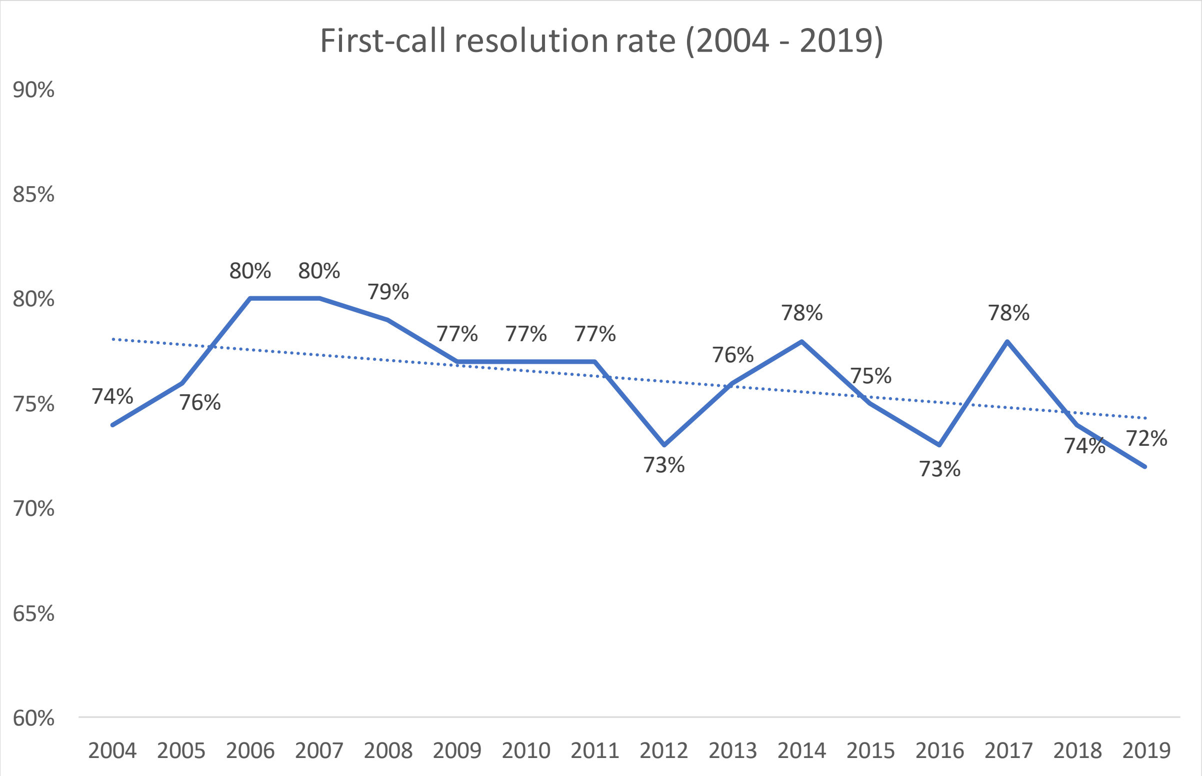
The chart shows the importance of various customer experience factors as an aggregated bar chart, segmented by age so as to show the factors that were of most importance to customers in each age range. Aggregating the results allows an understanding of which factors were placed in the top three overall, while also providing insight on age-related opinion.

For example, 47% of the youngest age group (16 to 24 years old) stated that first-contact resolution was one of their top three most important factors, whereas 60% of the oldest age group (over 65 years old) placed this in their top three. This research shows that both businesses and consumers agree that first-contact resolution is the most important single factor impacting upon customer experience when contacting a business ('first-contact resolution' is joint first with consumers, alongside 'UK-based agents').

The chart below shows the changes in FCR for UK contact centres over a period from 2004. While the drops in first-contact resolution rate in 2012 and 2016 seemed to have been more of a statistical blip than a fundamental change, with the mean average over time being 75-76%, the overall trend line for FCR is actually declining very slightly: as the easier interactions go to self-service (especially online), the contact centre is left with more difficult and varied tasks.

As the contact centre adapts and invests in better ways of handling customer requests, first-contact resolution rate increases and parity resumes. The exodus of 'easy' work to self-service channels may not be quite balanced by immediate balancing improvements in knowledge sharing and other agent support processes that would mean stable first-contact resolution rates.

Figure 43: First-call resolution rate (2004 - 2019)



It is important however to reiterate that higher FCR in itself does not guarantee cost savings: the failure of a self-service solution which drives customers to use the phone for simple interactions may well increase FCR, but will certainly increase call volumes and thus costs. As such, businesses should remember that FCR should be used in conjunction with overall call volumes and the number of unresolved/resolved calls.

The effect of low FCR on agent morale and engagement should also be considered: it is disheartening for agents to feel that they cannot help effectively and to be handling large numbers of calls from frustrated customers each day. Without doubt, this has a negative effect upon morale, absence and eventually attrition, creating unnecessary recruitment and training costs.

How can improved agent engagement & empowerment affect average speed to answer?

- Supporting agents through a unified desktop and RPA means that they will have less of the repetitive and difficult work involved in searching through multiple applications and databases, and lengthy after-call work, meaning that they are available to take the next call more quickly
- Engagement and empowerment reduces attrition and absence rates, meaning that more agents will be available to handle customer enquiries
- Effective self-service options means that fewer unnecessary calls are presented to agents

Average speed to answer (ASA) is another of those traditional statistics which has always been measured, and there is a strong case for keeping it at the forefront of how contact centres measure their success. Speed to answer plays a vital part in improving the customer experience, and also feeds into other performance measures such as call abandonment rate. However, contact centres should also keep a close eye on "longest call waiting" statistics to get a fuller picture of the pre-call experience that customers are having.

As an aside, past ContactBabel research[4] has indicated that callers believe that they wait for an average of 11½ minutes to speak with an agent. As average speed to answer is usually around 30 seconds, this statistic does not make sense, particularly in the light of the average time to call abandonment being well under 2 minutes (i.e. this makes the 11½ minute statistic is very unlikely to be true, as the vast majority of callers would actually have hung up long before this time).

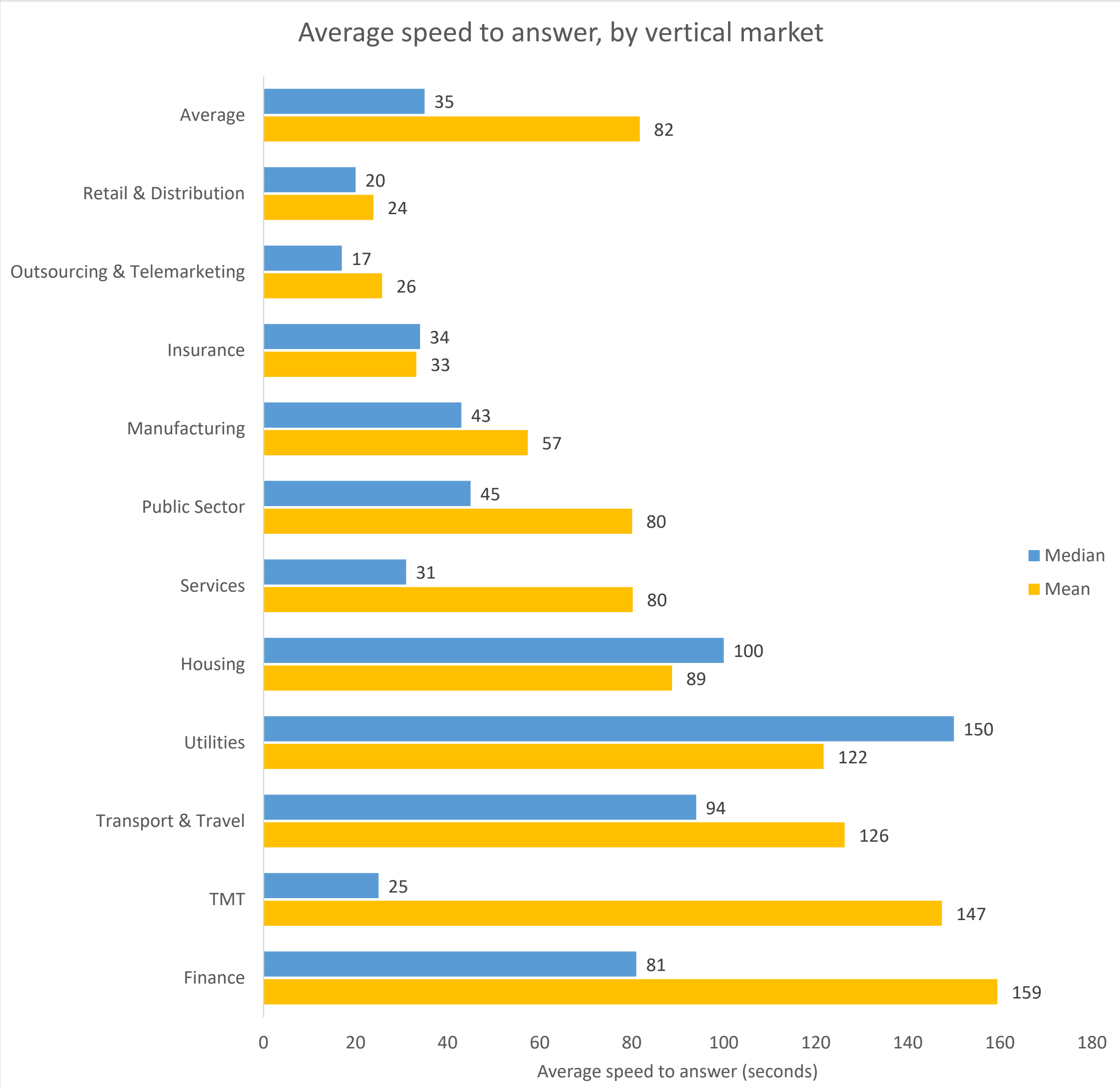
Our conclusion is that the "11½ minute" figure is collected from people's subjective view, rather than anyone waiting by the phone with a stopwatch. Also, people tend to remember the times they had to wait a long time, rather than the times they were answered straightaway. Regardless of the reality, speed to answer does affect customers' perceptions of the contact centre's quality.

[4] Source: ContactBabel analysis of ICM Research data interviewing 1,004 UK adults on behalf of Vicorp.

The utilities sector has the highest median ASA, although a few finance and TMT (technology, media and telecoms) respondents report very significant wait times for customers, which drag those sectors' mean average up well over the 2-minute mark.

Respondents from the retail and outsourcing sectors in particular seem to have speed to answer under control.

Figure 44: Average speed to answer, by vertical market



While high-volume yet simple interactions, such as password reset and account balance, are carried out via self-service, whether through IVR or the website, the overall industry ASA mean average had stayed relatively steady since around 2005, at 25-30 seconds, until the rise in mean ASA to 50 seconds last year. The effects of the pandemic on customer contact – both from the perspective of increased customer demand in some vertical markets, and also the difficulties in supporting a remote working model and cost-cutting measures – have meant that average speed to answer has increased hugely to 88 seconds.

How can improved agent engagement & empowerment affect NPS / customer satisfaction scores?

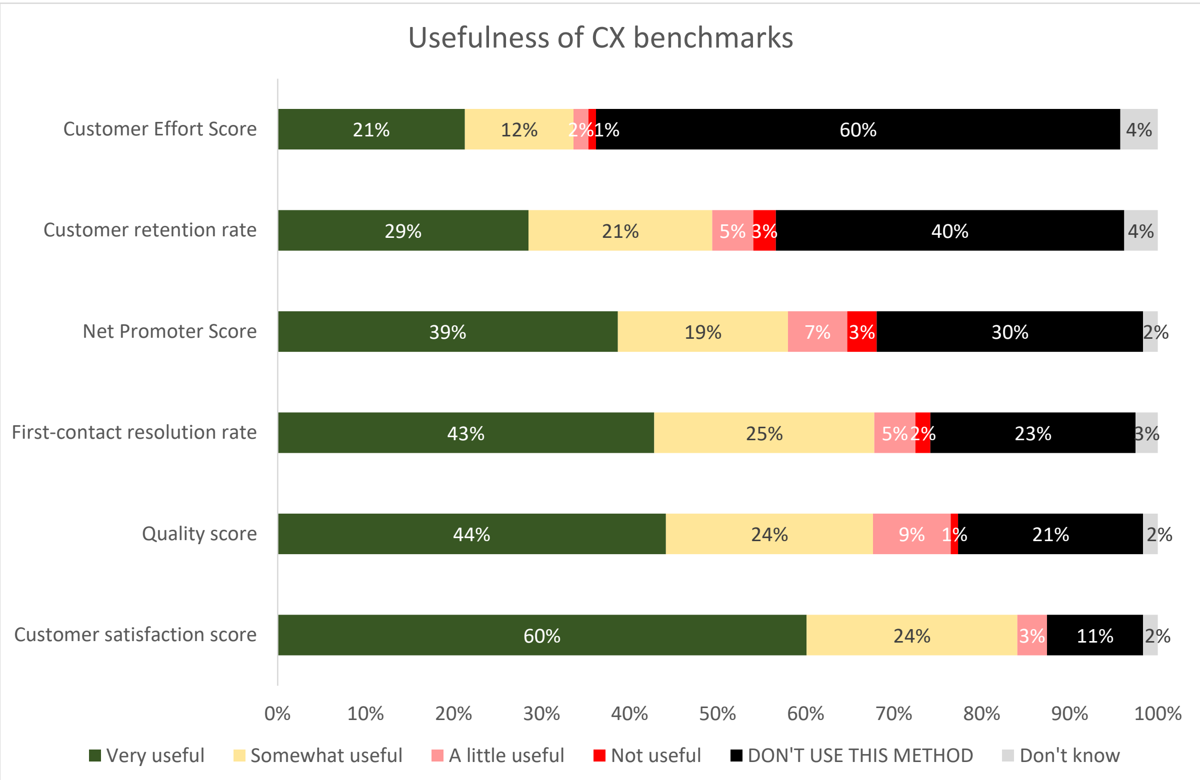
- Agents that are empowered and supported to handle a customer issue regardless of channel and the amount of time taken to handle it will be more likely to solve it for the customer
- Engaged, helpful and enthusiastic agents will make the customer experience better

The most widely used customer experience benchmark is the general customer satisfaction rating, which is used by 87% of contact centre survey respondents. First-contact resolution rate is used by 74%, Net Promoter Score (NPS) 68%, customer retention rate 56% and agent quality scores 77%. Customer effort score is much less widely used, however is still in place in 36% of respondents.

69% of respondents that used it stated that they believed that customer satisfaction score was a useful indicator of customer experience, being the highest-rated metric. Most of the other customer experience benchmarks received very similar scores, with around half of respondents stating that they were 'very useful', and lower proportions stating that they were 'somewhat useful'. Customer effort score was seen as more useful than most.

NPS was rated the lowest, with 57% stating that it was very useful, but 15% saying it was of little or no use.

Figure 45: Usefulness of CX benchmarks



However, the relatively lukewarm attitude of senior operational employees to NPS is not shared at the board-level.

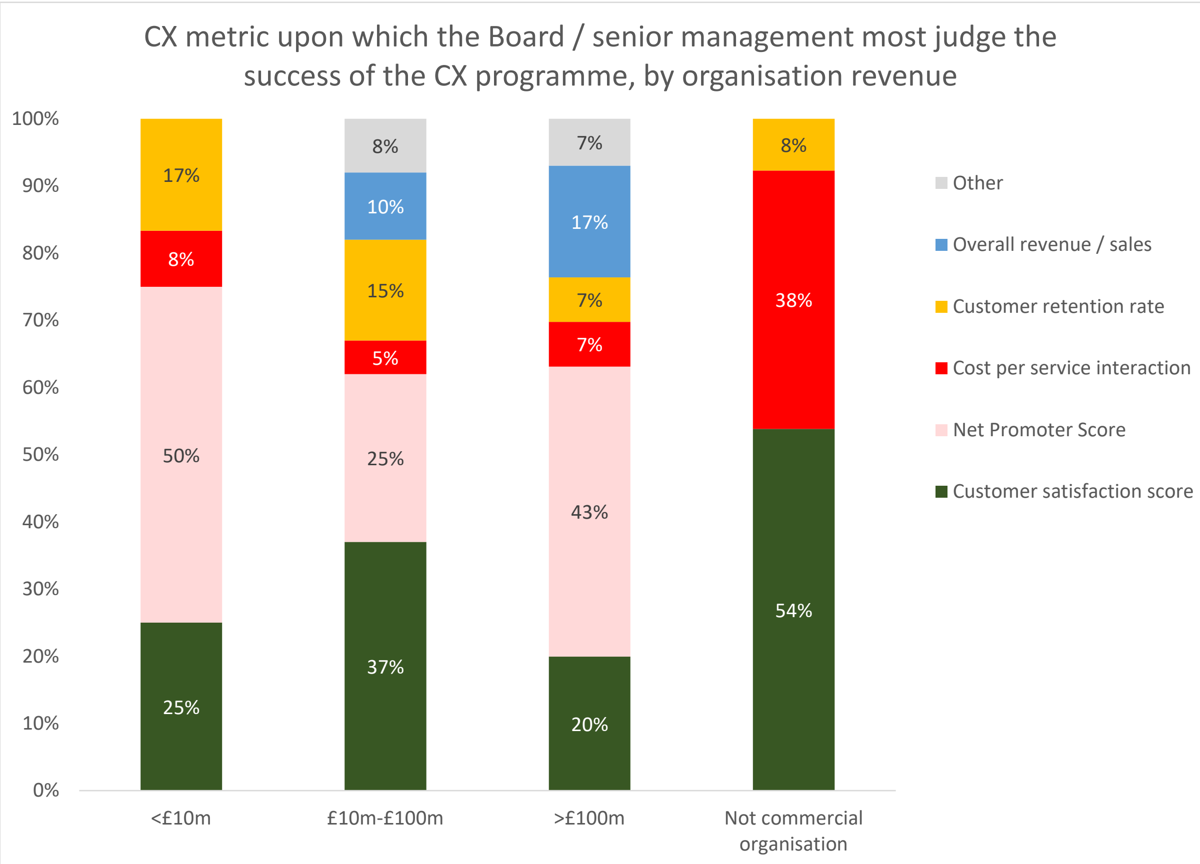
Survey respondents were asked to pick a single customer experience metric upon which their board or senior management team most judged the success or otherwise of the customer experience programme.

There was a wide mix of responses, with NPS and customer satisfaction score accounting for almost 60% of responses.

Interestingly, despite customer effort score being seen as one of the most useful CX benchmarking metrics, only 1% of respondents stated that it was the CX metric considered most important by the senior management team.

Of even greater note is the fact that first-contact resolution rate was identified as being the key CX metric for senior management by only 5% of respondents, despite both the customer and business survey results earlier in this report showing clearly that first-contact resolution was the most important factor in influencing customer experience.

Figure 46: CX metric upon which the Board / senior management most judge the success of the CX programme, by organisational revenue



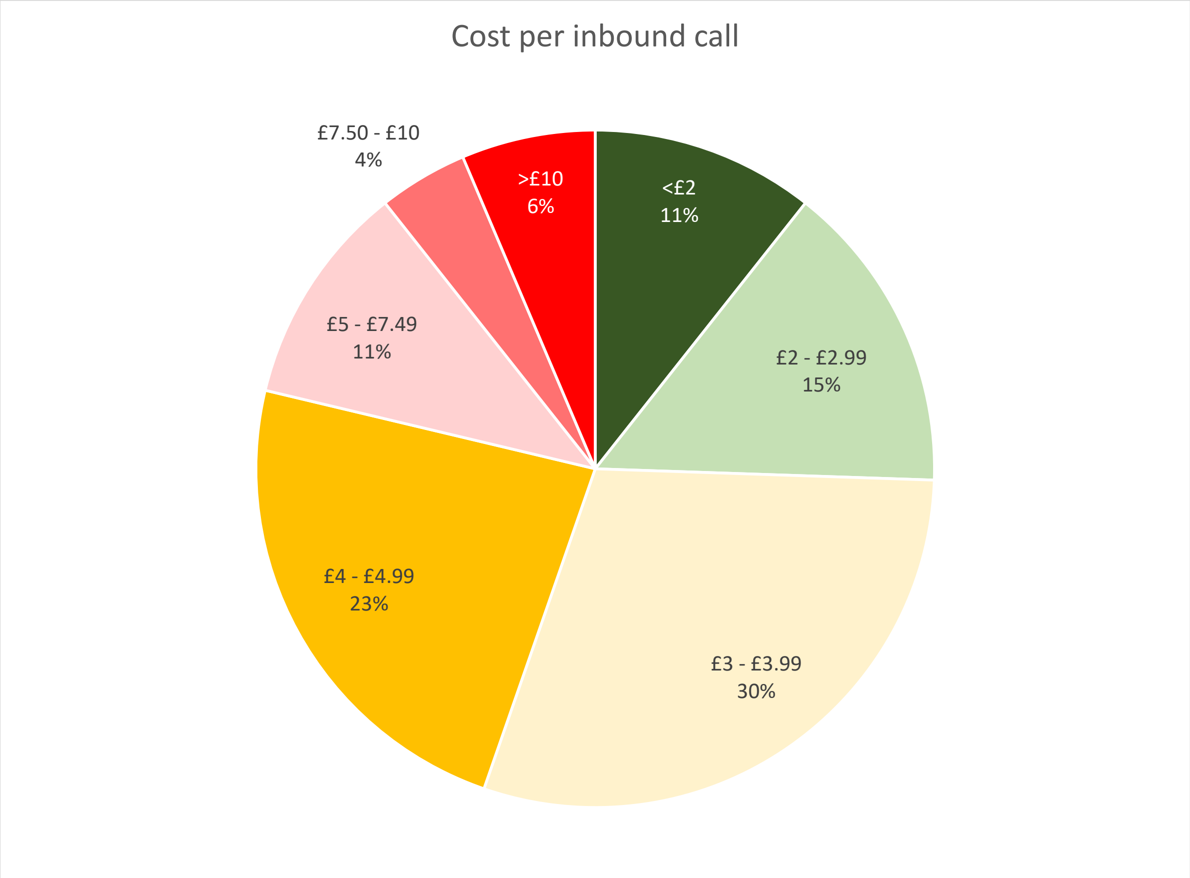
How can improved agent engagement & empowerment affect cost of service?

- Having agents who are empowered and motivated to solve customer issues first-time will mean that fewer repeat calls are received
- Effective self-service will greatly reduce the number of calls taken
- Using chatbots, voicebots and AI to handle simple requests will reduce the number of live contacts required

Cost per call is a difficult metric for a business to calculate, and even more difficult to benchmark in any meaningful way as calls can vary massively in cost even within the same contact centre, and there is no universally agreement over which elements of cost to include within this metric.

As values can vary so wildly, the best way to display the information is by showing the frequency of each call cost. 50% of survey respondents reported inbound call costs of under £4, with the mean average being £4.55. The median average is £3.49, the 1st quartile is £4.40 and the 3rd quartile is £2.95.

Figure 47: Cost per inbound call



While email and web chat have a reported cost advantage over telephony, the differential is not as large as it could be as relatively low levels of automation are being used to answer either emails or web chats, presenting a significant opportunity for businesses and solution providers.

Figure 48: Cost per inbound interaction (phone, social media, email & web chat)

Channel	Mean	1st quartile	Median	3rd quartile
Phone	£4.55	£4.50	£3.49	£2.89
Email	£4.10	£4.30	£2.89	£1.70
Web chat	£2.56	£3.12	£2.00	£1.10
Social media	£2.37	£3.80	£2.40	£1.20

SUMMARY

To improve agent engagement and empowerment requires technology, HR and business processes to work together: this is not simply something that can be handled through implementing new systems.

The culture of the organisation has to move to becoming more trust-based, backed up by the technology required to do this:

- encourage them to own the customer's issue and follow it through rather than focusing only on cost-based metrics
- provide a fair assessment of agent performance based on analysing all of the customer interactions they have, rather than focusing on a tiny proportion
- reward and recognise agent achievements and knowledge, based on the metrics that the business actually wants to improve
- make agent roles more fun and interesting through gamification, blending channels and reducing the amount of repetitive and dull work that they are presented with
- allow agents to choose their own schedules and holidays as far as possible
- support remote working through effective team communications, coaching and robust IT systems.

Having agents who are happy in their work and who care about customers will mean that the customer experience will improve very quickly. This will also mean that these agents are far more likely to stay with the organisation and that their absence rates will decrease.

While calculating a hard return on investment for agent engagement and empowerment may not be straightforward, businesses should acknowledge that the command and control model of contact centre working should be consigned to history, and that there is a new and better way of doing things.

ABOUT CONTACTBABEL

ContactBabel is the contact centre industry expert. If you have a question about how the industry works, or where it's heading, the chances are we have the answer.

The coverage provided by our massive and ongoing primary research projects is matched by our experience analysing the contact centre industry. We understand how technology, people and process best fit together, and how they will work collectively in the future.

We help the biggest and most successful vendors develop their contact centre strategies and talk to the right prospects. We have shown the UK government how the global contact centre industry will develop and change. We help contact centres compare themselves to their closest competitors so they can understand what they are doing well and what needs to improve.

If you have a question about your company's place in the contact centre industry, please get in touch.

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- The European Contact Centre Decision-Makers' Guide
- The UK Contact Centre Decision-Makers' Guide
- The US Contact Center Decision-Makers' Guide
- The UK Customer Experience Decision-Makers' Guide
- The US Customer Experience Decision-Makers' Guide

- UK Contact Centre Verticals: Communications; Finance; Insurance; Outsourcing; Retail & Distribution; Utilities
- US Contact Center Verticals: Communications; Finance; Healthcare; Insurance; Outsourcing; Retail & Distribution.