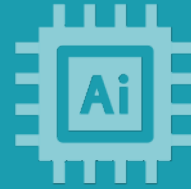
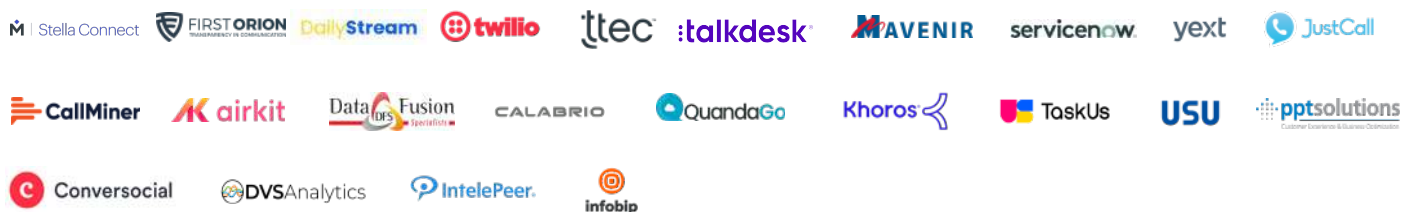


# MARKET STUDY FUTURE OF THE CONTACT CENTER: A FORECAST



SPONSORED BY:



## TABLE OF CONTENTS

<b>3</b>	INTRODUCTION	<b>42</b>	Voice of the Customer: The Key To Engaging Agents In A Remote World
<b>4</b>	Methodology & Demographics	<b>47</b>	3 Reasons Why the Phone Channel Must Be Improved In The Contact Center of the Future
<b>4</b>	About the Author	<b>50</b>	Embrace The New Contact Center, But Don't Forget Its Purpose
<b>5</b>	Key Findings	<b>55</b>	How To Reduce Agent Effort & Create A More Flexible CX
<b>6</b>	The Future (Role) of the Contact Center	<b>60</b>	Reimagining Agent Coaching in a Remote Environment
<b>8</b>	State of the Contact Center: LINGERING CHALLENGES AND EMERGING PAIN POINTS	<b>64</b>	Democratizing Your Customer Data: Unlock Business Value from Contact Center to C-Suite
<b>11</b>	Did COVID-19 really “accelerate” the digital transformation?	<b>67</b>	The State of Digital Customer Experience in 2021
<b>12</b>	Plan for the Contact Center: Priorities for 2022 and Beyond	<b>71</b>	Enhance Your Customer Experience
<b>14</b>	Future of Artificial Intelligence	<b>74</b>	The CX Automation Opportunity
<b>16</b>	Future of the Phone Channel	<b>79</b>	Resolving Complexity in the Contact Center
<b>18</b>	Readying Customers for Digital	<b>84</b>	Bolt: Driver Conversion up 40% Thanks to New Registration Journey
<b>20</b>	Future of the Contact Center Work Environment	<b>87</b>	Appendix
<b>22</b>	Increasing Agent Retention	<b>89</b>	2021 Editorial Calendar
<b>25</b>	AI Search: The Fastest Way to Fewer Tickets	<b>90</b>	Meet the Team
<b>28</b>	4 Ways To Take Your Digital CX To The Next Level		
<b>33</b>	The Contact Center Has Changed, Now It's Time To Transform CX		
<b>37</b>	80:20   The Future of Automation in the Contact Center		

## INTRODUCTION

Say goodbye to debate over the value of the contact center. Say hello to conversation about how the contact center can *achieve* that value in today's rapidly changing world.

How will contact center strategy evolve to accommodate new customer behaviors and changing engagement preferences? How will companies navigate tricky balances related to digital and voice-based engagement or automation and agent-led support? How will companies navigate the "remote vs. on-site" debate at a time when employee expectations and standards are radically evolving?

The product of extensive research into the customer contact space, this Market Study has the answers. It reveals the priorities, visions, and preferences that will impact the makeup of the customer contact function – and overall customer experience strategy – in the years to come. It also reveals the success-threatening pain points and game-changing strategies that can break or make short- and long-term success.

After exploring the research and its ramifications, the Study closes with a "Practicality Guide" rich with inventive best practices, innovative technology recommendations, and case study examples.

## METHODOLOGY & DEMOGRAPHICS

To compile research for Future of the Contact Center: A Forecast, CCW Digital surveyed contact center, customer experience, operations, marketing, digital strategy, and IT leaders in September and October 2021. The survey focused on big picture objectives, performance benchmarking, urgent priorities, lingering threats to success, and long-term projections.

Example respondent job titles included senior director of global operations, chief executive officer, director of workforce optimization, vice president of care management, head of customer experience, customer service manager, patient support manager, senior director of commercial operations, digital transformation architect, vice president of marketing, and director of CX.

Respondents represented companies of all sizes from numerous industries.

## ABOUT THE AUTHOR



**Brian Cantor**  
Principal Analyst, CCW Digital  
**Customer Management Practice**



Brian Cantor is the principal analyst and director for CCW Digital, the global online community and research hub for customer contact professionals. In his role, Brian leads all customer experience, contact center, technology, and employee engagement research initiatives for CCW. CCW Digital's articles, special reports, commentaries, infographics, executive interviews, webinars, and online events reach a community of over 150,000.

A passionate advocate for customer centricity, Brian regularly speaks on major CX conference agendas. He also advises organizations on customer experience and business development strategies.

## KEY FINDINGS

- 1 Some thought leaders refer to the current business landscape as the “era of customer centricity,” and the majority of companies agree. They are most likely to assess the value of the contact center based on its ability to generate customer satisfaction and loyalty.
- 2 Contact centers can also prove their value by cultivating reputations for customer and employee centricity and driving increases in customer lifetime value.
- 3 Fragmentation remains a problem for the contact center, with “disconnected systems” and “disconnected channels” ranking as the leading operational pain points
- 4 Other noteworthy pain points include high agent turnover, an inability to successfully support remote work, and cumbersome processes.
- 5 Not all contact centers feel that COVID-19 meaningfully accelerated their digital transformations. About one-third actually believe their digital initiatives have progressed *more slowly than expected* over the past two years.
- 6 As it looks ahead to 2022, the customer contact community identifies improving customer-facing AI as a top priority.
- 7 Additional priorities include creating more seamless and effective experiences across and *within* channels, better leveraging employee-facing AI, and better managing customer journeys.
- 8 Although most businesses expect AI to play a meaningful role in the contact center of the future, none believes it will ever be the preference for all customer interactions. A non-trivial 31%, in fact, doubt that AI will emerge as the preference for *any type* of interaction.
- 9 Advocates of the traditional phone call have ample reason for optimism. Only 3% believe live phone conversations will become obsolete in the contact center of the future, and 85% believe *all customers* should have access to live voice agents. A whopping 40% believe all customers should have near-instant access to live phone support for all issues.
- 10 Hoping to elevate comfort and utilization rates in new channels, the majority of companies are working to elevate the quality of their digital experiences.
- 11 Other top digital priorities include increasing resources, adding more channel options, leveraging digital-specific experience innovations, and proactively inviting customers to use digital at key moments of truth.
- 12 Remote work is indeed here to stay. Only 12% of contact centers believe they will ever revert to a traditional, mostly on-site contact center model.
- 13 Increasing work flexibility ranks as the #1 strategy for combating high agent attrition.
- 14 Companies also view improved training and coaching, tools and systems upgrades, team-building and social functions, better rewards and incentives, and stronger career-pathing as valid antidotes to agent churn.



## THE FUTURE (ROLE) OF THE CONTACT CENTER

The debate over whether the contact center is a “cost center” or “value center” has long been put to bed. By now, most companies accept the latter stance and recognize that the contact center can have a positive impact on their business.

The more contemporary debate focuses on *how* the contact center can most fruitfully impact the business. The answer to that question has significant ramifications on everything from C-level buy-in, to budgetary freedom, to metrics and key performance indicators. It will also open (or close) the door to cross-departmental collaboration. The wider the potential impact, the more likely other teams are to see merit in coordinating on vision, strategy, and technology investments.

Ultimately, today’s companies believe the contact center is *best* assessed by its impact on the customer experience. Just shy of 53% say their contact center’s business contribution will be measured by its ability to increase customer satisfaction; an equivalent number say their company will focus on its contribution to customer retention and loyalty.

There is nothing especially surprising about this hierarchy; as the gateway between a brand and its customers, it stands to reason that customer satisfaction and loyalty would rank as the top indicators of success. The finding does, however,

affirm the extent to which the customer experience has evolved from an insular customer contact focus into a greater business priority. Companies *care* about whether the contact center is driving these positive outcomes.

Other contact center value metrics include its success in creating a customer-centric brand reputation (44%), its ability to increase customer lifetime value (38%), and its effort to create an employee-centric image (37%).

Previous CCW Digital research has confirmed that many customers consider the customer experience when determining the brands from which to buy. It is therefore thoroughly logical that many companies depend on their contact centers to cultivate a reputation for customer centricity.

A contact center that delivers consistently impressive experiences is likely to drive favorable word-of-mouth and social chatter. That chatter becomes a valuable source of differentiation — a clear way to cut through the noise in today’s increasingly crowded, competitive market landscape.

CCW Digital research has confirmed that the majority of customers will consider a competitor after just one or two bad experiences. They will also become *more loyal* to a brand that delivers stellar interactions that are simultaneously friendly and convenient. The contact

center, therefore, has the power to attract additional and longer-lasting spend from customers, resulting in a marked increase in customer lifetime value.

By virtue of reducing the need to seek support and minimizing handle time when customers do connect, a successful contact center will *also* reduce customer lifetime cost. That measure does not, however, represent an equivalently universal priority; only 21% say it affects their business' view of the contact center. The disparity offers further proof that today's businesses, though certainly aware of costs, are cognizant of the positive outcomes their contact centers can generate.

Just as companies are looking to cut through the noise in attracting customers, they are also aiming to attract talent in a more competitive labor landscape. Thanks to the

rise of remote work and a reassessment of their personal worth, today's job seekers are more empowered and confident than ever in their pursuit of the best possible career opportunity.

Given the sheer amount of hiring, the amount of marketplace competition, and the historical stigma associated with the function, the contact center can play an instrumental role in shaping a company's reputation with job-seekers. It is no surprise, therefore, that companies are increasingly relying on the contact center to favorably communicate corporate culture.

The expectation is also a very fair one; contact center leaders have long touted the connection between happy agents and happy customers. The time has come for contact centers to prove they can create those ecstatic employees.

### Which of the following will be essential for measuring the value of your contact center/CX function moving forward?





## STATE OF THE CONTACT CENTER: LINGERING CHALLENGES AND EMERGING PAIN POINTS

Companies hope that the contact center of the future will drive increases in customer satisfaction, retention, and lifetime value, while creating a more favorable reputation with consumers and potential employees.

To turn hope into reality, contact centers will have to overcome an assortment of new and lingering pain points. They will have to ensure their employees and systems are in position to connect with customers throughout the entire journey.

Which pain points and inefficiencies are most notably thwarting success? For today's contact centers, the most common answers include disconnected systems (51%), disconnected channels (43%), high agent turnover (33%), systemic inability to support remote work (31%), and cumbersome processes (31%).

Concepts like unity, alignment, gap-bridging are popular topics across all business functions, and they have particular relevance in the contact center. Systems notoriously "do not talk to each other," with the typical



company saying that agents have to access multiple screens and systems during even the most routine customer interactions. With customers introducing more complex inquiries and exhibiting higher standards, agents' inability to seamlessly access all tools and data will only become more costly in the years ahead.

Troublingly, the difficulty agents face within interaction is only one facet of the challenge. Companies with disconnected systems will struggle to gather valid operational data and automate meaningful processes. They will also struggle to collaborate with other departments, as gaps in systems inevitably drive wedges in strategic alignment.

Not simply about back-end systems, operational misalignment is also visible — and costly — across contact channels. If customers face hurdles in moving from touch point to touch point — an expected behavior in today's omnichannel world — their frustration will rise and their satisfaction and loyalty will fall.

Beyond hurting customer perception, fragmented channels undermine productivity. When data does not flow seamlessly between channels, agents will have to start from scratch each time they interact with transferring customers. As they further frustrate customers, these repetitive questions will increase average handle time and compound agent dissatisfaction.

A product of ineffective systems, frustrating workflow, insufficient compensation, and unappealing corporate cultures, high agent turnover is *also* an operational pain point. When agents leave, they take their expertise and training time with them. Their departure forces companies to invest more time and resources into recruiting and onboarding agents who are harder to find in today's landscape *and* unlikely to match the productivity of experienced ones. Companies will be exerting more effort for less reward.

Retaining agents is for naught, however, if companies do not *enable* them to perform. The rise of remote work has exacerbated the enablement challenge, forcing companies to ensure they have the technology and processes to keep outside agents engaged, motivated, trained, and empowered. Despite spending two years in a world governed by COVID-19, many companies have yet to build a contact center framework that can span office walls and geographic borders.

Cumbersome processes have long reigned as a contact center pain point, with consumers and business leaders joining in their mockery of antiquated forms and supervisor approval. The simultaneous rises of work-from-home and digital self-service have only amplified the harm of these processes, as employees and customers have both a greater expectation of autonomy and a lesser ability to receive support for navigating complex processes. An at-home agent does not always have easy access to a supervisor who can "approve" resolutions, which means the prospect of delivering a fast, frictionless, personalized experience is far dimmer.

## As we approach 2022, which of these operational “pain points” are affecting your contact center?



## DID COVID-19 REALLY “ACCELERATE” THE DIGITAL TRANSFORMATION?

A popular thought leader narrative contends that the COVID-19 pandemic greatly accelerated the digital transformation. Does the claim hold water?

On the one hand, digital engagement has *clearly* gained traction over the past two years. Customers are not only more likely to connect with brands via chat, messaging, and social media but more comfortable using them. They are also more confident that digital interactions will produce valuable resolutions.

On the other hand, pain points like disconnected systems, fragmented channels, cumbersome processes, and inflexible contact center frameworks are still commonplace. And while customer *comfort* with digital channels is at an all-time high, customer *satisfaction* with these channels continues to lag behind that for traditional phone interactions.

The idea that contact centers suddenly broke from their infamous operational inertia and transformed into digital-first organizations is therefore worthy of meaningful exploration.

The exploration reveals that 26% of companies feel their progress toward a digital transformation has been “as fast as expected” over the past two years. Although the statistic does not *condemn* the progress companies have made, it questions the notion that COVID-19 accelerated the innovation process.

An equivalent 26% of companies, moreover, contend that their digital transformation has actually been *somewhat slower than expected* over the past two years. An additional 6% say that their digital journey has been going much *slower than expected*.

The majority of companies, therefore, dispute the idea that COVID-19 accelerated digital adoption.

Granted, support for the contemporary thought leader cliché *does* exist. More than 19% say their transformation has been much faster than expected, and 15% say it has been somewhat faster than expected.

Ultimately, however, it is clear that the customer contact community is not yet in position to celebrate a mission being accomplished. The typical organization has plenty of work to do in terms of strengthening its digital experiences and modernizing its contact center framework.

### How would you assess your contact center/CX team’s progress toward a “digital transformation” over the past two years?



- 19.23% Much faster/more successful than expected
- 15.38% Somewhat faster/more successful than expected
- 25.64% About as fast/successful as expected
- 25.64% Somewhat slower/less successful than expected
- 6.41% Much slower/less successful than expected
- 7.69% Not applicable - we were either already 100% digitally transformed or have no interest in digital



## PLAN FOR THE CONTACT CENTER: PRIORITIES FOR 2022 AND BEYOND

Whether their immediate focus is driving innovation, generating positive value, or eliminating long-standing pain points, contact center leaders have numerous initiatives and investments to consider. Given time, budget, and resource limitations, not all will make the cut.

One initiative that will take priority in many organizations, however, is the improving customer-facing artificial intelligence. A significant 46% of companies believe solutions like chatbots and intelligent routing can lead their contact center to a more fruitful future.

Other high-ranking priorities include creating seamless experiences *across* channels (42%), improving the use of AI for employee productivity (41%), improving experience quality *within* digital channels (40%), and better mapping and orchestrating customer journeys (37%).

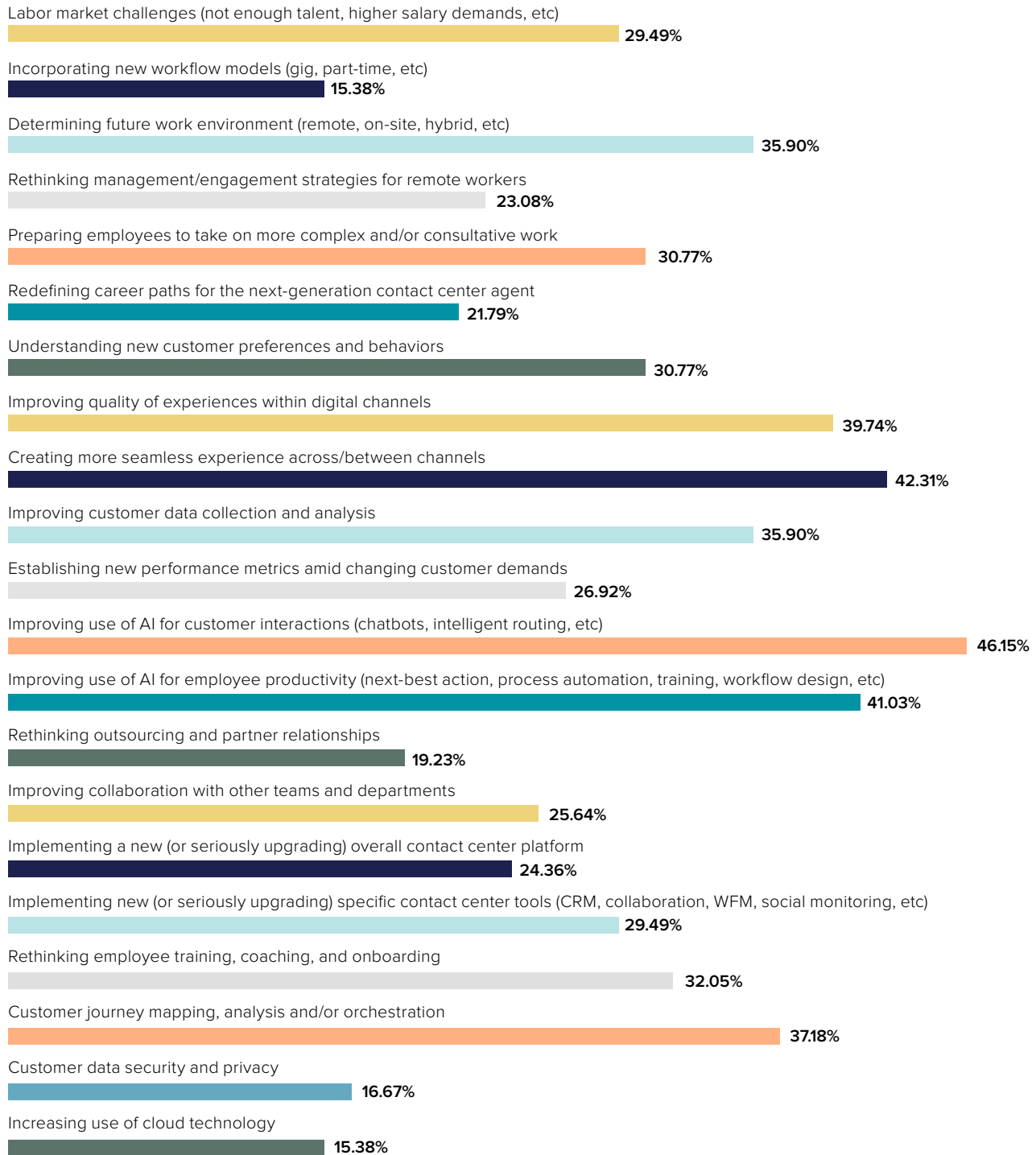
Collectively, the priorities reflect a desire to *modernize* the contact center operation and create experiences that are more efficient, more aligned with customer preferences, and more capable of yielding meaningful connections.

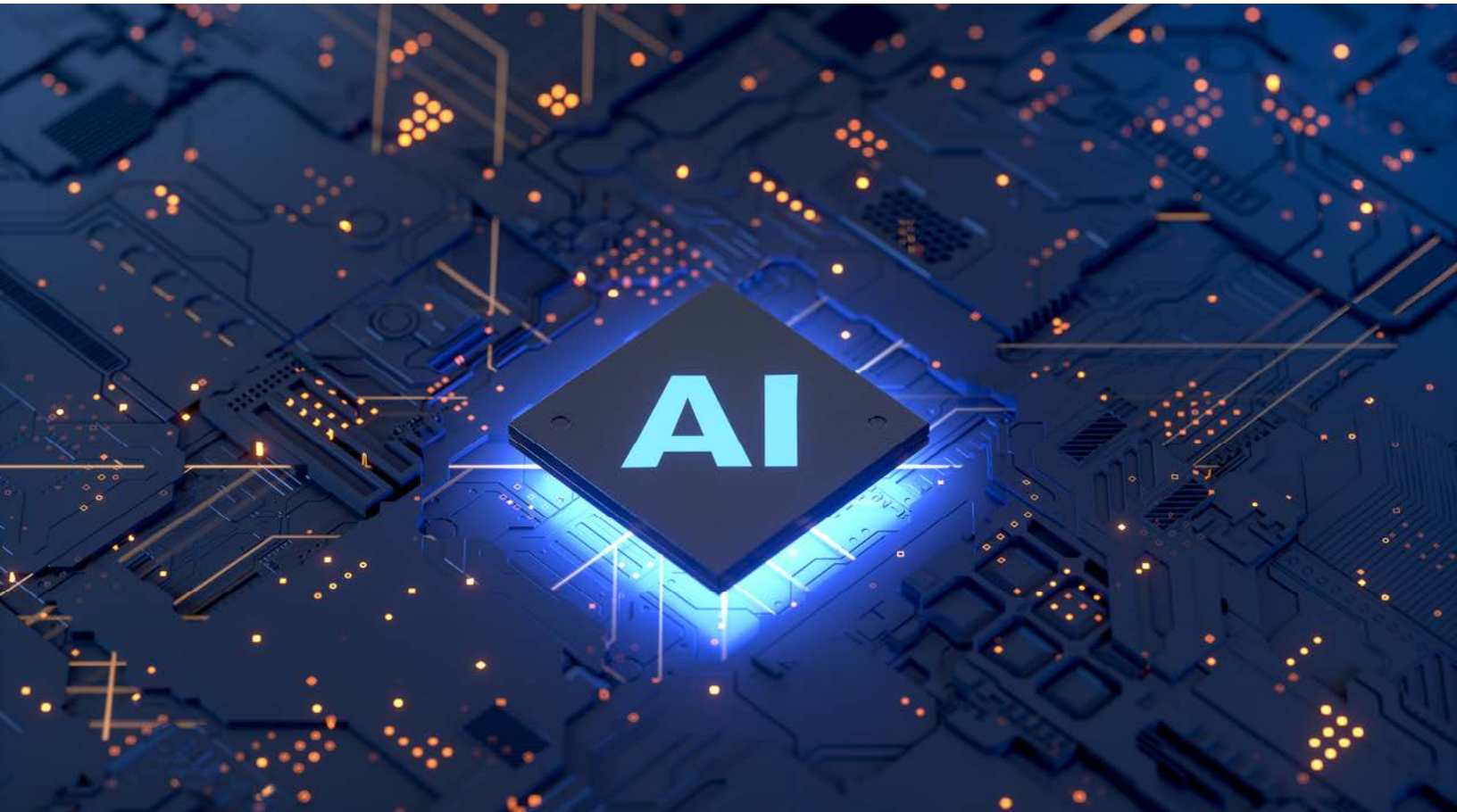
Whether deployed on the frontend or backend, AI reduces the hurdle to *relevant* customer interactions. Better chatbots yield more effective customer service, while intelligent routing ensures those who do need to escalate go directly to the most suitable agent. Because AI is freeing agents from grunt work and providing more useful data and guidance, they will be especially *likely* to build a strong rapport with the customer.

By simultaneously elevating individual digital experiences *and* improving integration between channels, companies turn the long-elusive idea of “meeting the customer on their terms” into a tangible reality.

A more deliberate, strategic approach to customer journeys will further reduce customer effort, while maximizing the value of each and every interaction.

## Which of these focuses will be top-of-mind for your contact center and/or CX function going into 2022?





## FUTURE OF ARTIFICIAL INTELLIGENCE

Customer-facing AI may be a paramount priority for many contact center teams, but it will not spell the death of live agent interactions. Not one of the surveyed professionals, in fact, foresees a future in which AI-driven self-service will be the preference for *all* interactions.

What role will AI play in the future of the contact center?  
What human conversations will it eliminate?

According to 38%, it will emerge as the preference for simple support or transactional issues, with agents handling the balance of customer communication. Another 31% believe AI will emerge as the preference for simple *and* moderate inquiries. Per the popular thought leader adage, agents will nonetheless remain involved in complex conversations.

Not all companies, however, are as bullish about the buzzy technology. A non-trivial 31% believe AI will *never* become a preference for any conversation. They believe it will always remain a secondary option, with the typical customer preferring an agent for most or all interactions.

AI absolutely *can* handle certain transactions and inquiries better than a human agent. Changing a delivery order via a messenger bot with a clear, visual menu, for example, is *clearly* easier than trying to explain the change over the phone to a busy employee in a crowded restaurant.

The fact that one-third of companies *doubt* AI's ability to become a preference is not, therefore, necessarily rooted in an objective comparison. Rather, it likely speaks to disillusionment with existing AI results *and* concern over customer perception.



Previous CCW Digital research offered a sobering revelation about AI: the overwhelming majority of organizations have yet to experience significant ROI from their investments. They are yet to experience the transformation technology advocates have long been trumpeting.

In many cases, the inefficacy of their customer- and agent-facing AI deployments are actually decreasing employee productivity and customer satisfaction. When bots do not work successfully, they increase customer effort and frustration. These customers then project their negative sentiment onto agents, who cannot provide efficient support because their *internal AI* is not providing the right guidance. These agents ultimately spend more time on calls with customers who are particularly unlikely to express satisfaction.

When bots fail to solve problems, a reality that has been all-too-common over the past decade, they also create a negative customer perception. Customers consequently

express a clear desire to go straight to a live agent on future interactions, creating pessimism among business leaders about whether the market will ever adopt AI as a preference.

This analytical well is, of course, poisoned by virtue of the fact that many companies are not deploying bots in the correct moment of their journey, not arming their bots with a singular, unified wealth of company knowledge and customer data, and not tapping into the *conversational* abilities of AI. Contemporary bots often come across as fancy FAQ pages, thus offering no discernible advantage to the customer while doing little to collect data that can be useful to the agent.

If companies take a more strategic, design-driven approach to their AI deployments and *arm* their bots and virtual assistants with conversational capabilities and human-led design, they can create self-service experiences that live up to the marketing hype. Upon doing so, they will start to chip away at customer skepticism.

### By 2025, what role do you realistically see AI self-service playing in customer support?



- 19.23% AI will remain a secondary option / most interactions will still involve an agent
- 15.38% AI will be the preference for transactions or simple support issues / most others will generally involve an agent
- 25.64% AI will be the preference for simple and moderate support issues / complex ones will generally involve an agent
- 25.64% AI will be the preference for all support issues / agents will mostly transition into non-support roles



## FUTURE OF THE PHONE CHANNEL

At a time when even digital-first natives are emphasizing traditional voice interactions — online financial powerhouse Robinhood launched 24/7 phone support in October 2021 — it would be absurd to suggest the phone channel is approaching extinction. Less than 3% of companies, in fact, believe the phone channel will become obsolete.

With all the emphasis on digital transformations and low-touch channels, it is, however, worth considering whether phone will play a dwindling role in the future of the contact center.

For a substantial number of contact leaders, the answer is a resounding no.

A whopping 40% believe customers should always have *easy or instant* access to a live phone agent for all issues. Since it would be overly optimistic to say that anywhere near 40% of companies are *currently* offering that caliber of phone support, the statistic indicates that many companies plan to strengthen their voice offering in the years ahead.

An additional 27% also aim to extend phone support for all issues, but they believe customers should have to interact with an IVR before reaching a live agent. The approach has merit in theory, but its success hinges on companies eliminating the friction, confusing menus, and impersonal questions that have become synonymous with the IVR platform.

Another 18% share support for a gatekeeper approach, but they believe the customer should have to start in a *digital* channel as opposed to a phone-based IVR. Some companies have already begun to passively implement this policy; their websites prominently tout digital offerings while making phone numbers exceedingly difficult to find.

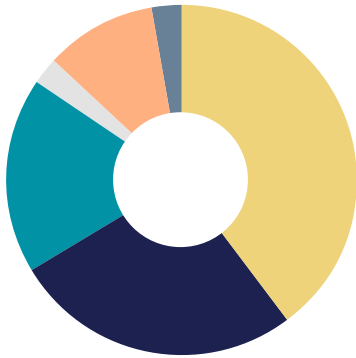
Granted, not all companies support broad access to phone support. Just over 10% believe phone should only be available for high-priority issues, while just shy of 3% feel it should be exclusive to VIP customers.

Thought leaders often speak of a theoretical dichotomy in which digital channels are optimal for typical issues and phone conversations are best for high-value interactions.

The noted 13% of companies plan to achieve that dichotomy through policy.



### Which best describes the role phone should play in the contact center of the future?



- **39.74%** All/most customers should always be able to easily/instantly access a live phone agent
- **26.92%** All/most customers should always be able to call, but they should have to go through an IVR before reaching a live agent
- **0.00%** All/most customers should have access to an IVR, but access to live phone agents should rarely/never be offered
- **17.95%** All/most customers should have access to call, but only after first attempting to address issue digitally
- **2.56%** Only VIP/high-value/specialty customers should have access to call
- **10.26%** Only customers with complex/high-priority/specific issues should have access to call
- **2.56%** No one should have access to call; phone will be obsolete



## READYING CUSTOMERS FOR DIGITAL

Digital comfort has reached an all-time high in the wake of the COVID-19 pandemic, but there is still considerable room for growth. Many customers continue to default to phone for issues that can — and often *should* — be handled via chat or messaging. More importantly, customer satisfaction levels for digital interactions remain underwhelming.

For 51% of companies, the situation is ultimately one of quality. These organizations plan to boost digital comfort and utilization by delivering a higher standard of engagement. The belief is that when customers have fast, frictionless, personalized, and resolute experiences in digital channels, they will grow more likely to *choose* such channels in the future.

Other popular digital enhancement efforts include increasing resources (45%), adding additional channel options (41%), leveraging “digital” advantages like media sharing and fast authentication (38%), and proactively popping up digital options during the user experience (35%).

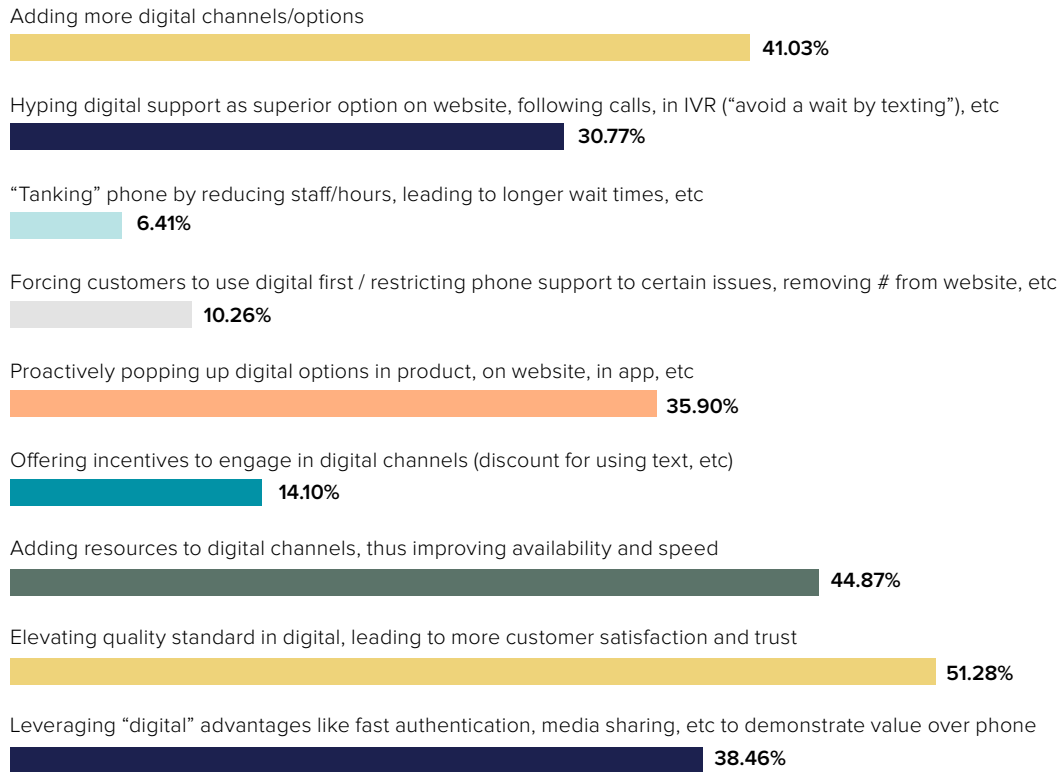
Convenience is a pivotal driver behind the digital revolution; by allocating additional staff and other resources to digital channels, companies increase speed and availability. As customers become confident that they can save time without sacrificing quality, they will become more likely to enthusiastically engage in digital environments.

Accommodating additional channel options also contributes to convenience. When customers can engage in the channels they are already using, as opposed to having to download native applications or navigate clunky websites, they are more likely to see the merit in digital communication.

Companies that pop digital options up within the user experience further play the convenience card; customers are less likely to go through the effort of calling a brand when a viable option is staring them in the face.

All channels are not created equal; phone and digital each offer distinct advantages. By highlighting those advantages, companies will turn digital into a *preference* — as opposed to an acceptable option — for some issues.

## What steps are you taking to improve use of and/or comfort with digital customer engagement options?





## FUTURE OF THE CONTACT CENTER WORK ENVIRONMENT

In the early stages of the COVID-19 pandemic, contact center leaders gained a front row seat to the viability of remote work. Although it was by no means without challenges and concerns, remote work *did* allow companies to continue developing products and continue connecting with customers in trying, uncertain times.

Content with the early results, contact center leaders began making bold statements about the future of remote work. Most declared that remote work would forever be an option for at least some employees, and some questioned whether they would ever bring agents back to a physical site.

One question nonetheless continued to linger: what would happen once COVID concerns subsided and re-opening the office became a legitimate option? Would the supposedly pro-remote work decision-makers walk their talk?

Over time, the conversation gained a new dimension: the voice of employees. As employees became set in their new daily routines, they became increasingly attached to the

prospect of working from home. For some, the previously inevitable idea of going into the office full-time was no longer tolerable, let alone appealing.

The decision a company makes is not, therefore, merely a reflection of leadership's personal belief in the remote work model. It is not merely an assessment of whether the company's systems and processes can sustain a permanently distributed workforce. It is not merely a balancing of the benefits and costs remote work imposes on productivity, creativity, and team synergy. It is also a statement on what types of employees the contact center will be able to attract and retain moving forward.

Taking the full gamut of considerations into account, most contact centers plan to permanently maintain at least some form of remote work. Only 12% believe they will revert to a primarily on-site model.

The majority of organizations will instead adopt hybrid models.

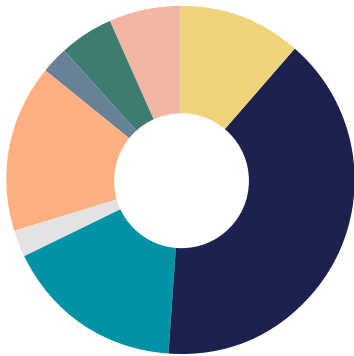
The most popular hybrid option, one in the cards for 40% of companies, will be hybrid by task. Under this model, employees will come into the office for certain tasks (like training and collaboration) and work remotely for others.

Other hybrid options focus on role (16%) and more random factors (3%). The former will use factors like seniority and job function to determine if and when employees need to come into the physical office. The latter will determine employees' work environment based on variables like last name or day of the week.

Some companies, meanwhile, believe in remote work as a full-time option. A substantial 15% of companies say they plan to allow agents to spend most of their time working in any location. Another 5% will focus on work-from-home in which agents will not have to come into the office but *will* have to work in close proximity to the physical site.

Just over 6% of companies have yet to make a decision, and 5% will *not* institute a policy. Their offices will be open, but agents will have complete autonomy over whether to come in or stay at home.

### Which best describes the contact center workforce model you expect to permanently adopt moving forward?



- **11.54%** Primarily On-site: Most agents will spend most of their time in the office
- **39.74%** Hybrid By Task: Agents will come into the office for certain tasks (training, collab, etc) and work remotely for others
- **16.67%** Hybrid By Role: Time spent in office vs. remote will depend on factors like seniority, job type, team, etc
- **2.56%** Hybrid By Other: Time spent in office will hinge on any other factors, such as last name, day of week, lottery, proximity to site, etc
- **15.38%** Primarily Remote (No Restriction): Most agents will spend most of their time working remotely, in any location
- **2.56%** Primarily At-Home: Most agents will work remotely, but they will have to live close to office (for reasons like logistics or taxes)
- **5.13%** No Policy: Agents will have full autonomy to choose if/when they come in
- **6.41%** Unsure: Have not yet made a firm plan/decision





## INCREASING AGENT RETENTION

As contact center leaders contemplate various remote, hybrid, and on-site workforce models, they are facing another, even broader workforce challenge: agent retention.

High agent turnover represents the third-biggest pain point facing today's contact centers, and its impact will only grow moving forward.

As employees reassess their self-worth, reevaluate their career ambitions, and reconsider their work-life preferences in the wake of COVID, they suddenly have access to infinitely more career options. Able to work remotely, employees no longer have to settle for monotonous, low-paying, tedious jobs at unspectacular brands in their nearest city. They have more power than ever to pursue the career — and attain the salary and perks — they want.

Contact centers that relied on inertia and complacency to keep their seats full and phone lines open are now at a heightened risk of losing talent and enduring the cost that comes with it.

Said cost is only rising. As agents increasingly focus on complex interactions, their expertise with a company's products and familiarity with its vision will become exponentially more important. Replacing agents to fill the void left by seasoned ones will be more expensive, time-consuming, and downright challenging than it ever has been.

Making matters worse, the same factors that make it harder to keep great agents are increasing the difficulty of *attracting* great agents. More confident and empowered

than ever before, today's job-seekers are not settling for the first "help wanted" ad that enters their field of vision.

A strategy for improving agent retention, therefore, represents a cornerstone of the contact center of the future.

For 49%, the strategy will involve turning the *challenge* into the *solution*. Unwilling to lose agents due to their workforce model, these companies will offer additional flexibility. From doubling down on remote work to introducing unorthodox scheduling options, these companies will better accommodate employee work preferences.

Other retention strategies include improving training and coaching (44%), improving contact center tools and systems (41%), increasing team-building and social functions (38%), increasing perks, rewards, and incentives (37%), and improving career-pathing and growth opportunities (37%).

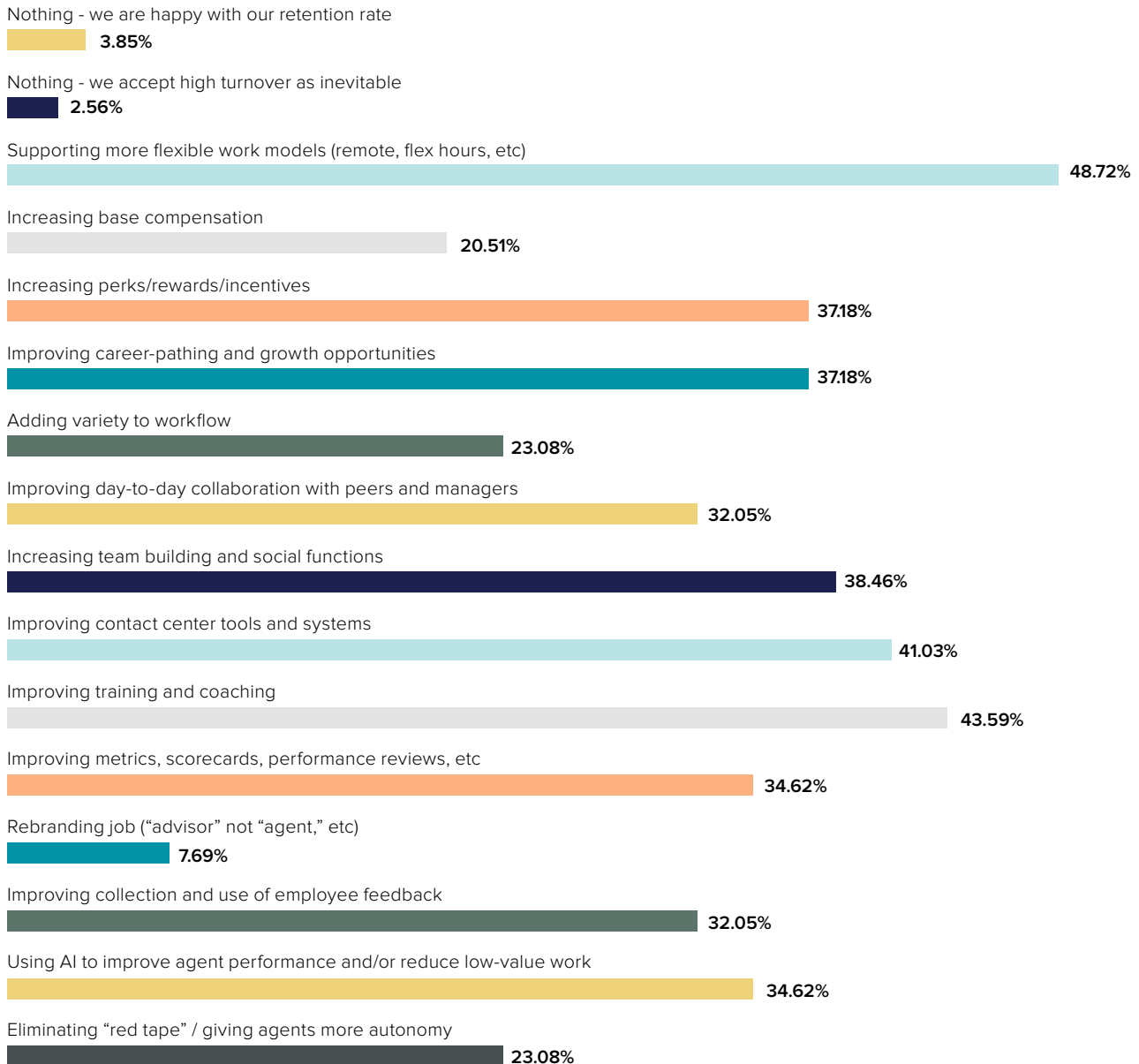
By improving coaching, companies will empower their agents to have more successful, productive interactions with customers. Free from the frustration of angry customers or exhausting conversations, these agents will derive more joy from their daily tasks and become more likely to stay for the long haul.

Stronger coaching also communicates the company's *investment* in its agents. Coupled with a greater emphasis on career trajectory, this visible investment will make employees feel more appreciated — and more confident in their future opportunity within the business. From confidence comes loyalty.

Improving contact center tools will eliminate the day-to-day frustration of the job, thus addressing a major driver of agent dissatisfaction and churn. Camaraderie exercises will help employees build an affinity for the social aspect of the company and its culture. Employees who *like* the people with whom they work are far less likely to search for an exit.

For as much as they care about tools, team-building, and other facets of the day-to-day experience, employees *do* seek the best possible compensation. Although only 21% of businesses are ready to increase base compensation, a substantial 37% will incentivize employees (and simultaneously drive better performance) with perks and rewards.

### Which of the following will you/are you employ(ing) to improve agent retention?

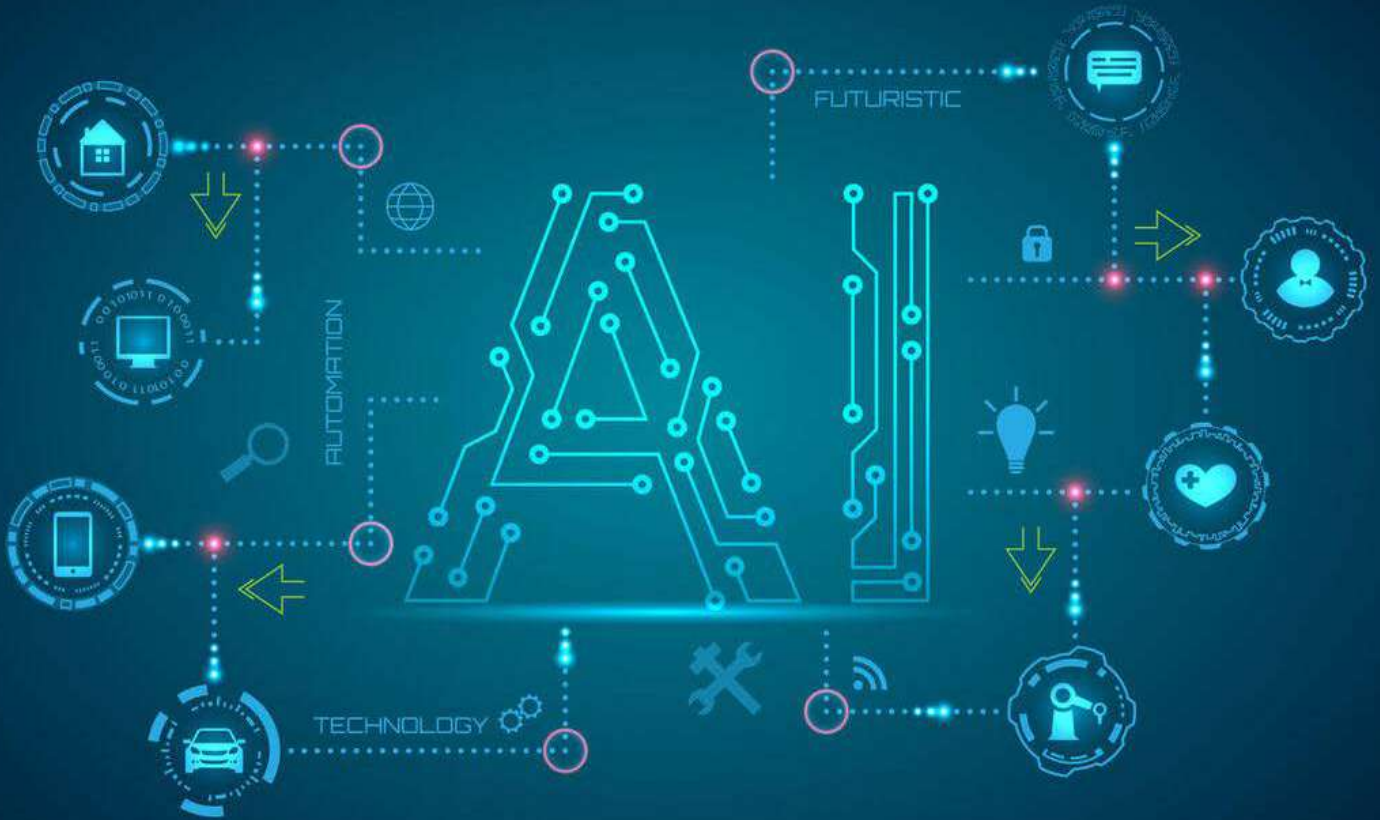


# PRACTICALITY GUIDE:

CUSTOMER EXPERIENCE CASE  
STUDIES, EXPERT TIPS, AND  
PRACTICAL EXERCISES THAT YOU  
CAN BRING BACK TO THE OFFICE.







yext

## AI SEARCH: THE FASTEST WAY TO FEWER TICKETS

While the way brands and consumers interact has drastically changed over the past two years, one factor remains constant: meeting and exceeding customer expectations must be at the heart of every brand's service strategy. More than ever, this means that businesses must help customers independently find the solutions to their problems.

### THE CONSUMER BEHAVIOR TRENDS YOU NO LONGER CAN IGNORE

Gone are the days of consumers willing to wait on hold, only for their issues to go unresolved. Now, when a customer encounters a problem with a product or service, they expect immediate resolution. As a result, the demand for self-service options has soared.

A single negative interaction (e.g. Having difficulty finding information or being "helped" by ill-equipped agents with little to no contextual information) can result in brands missing out on the lifetime value of a potential or existing customer — and even steer them directly towards their competition.

*For any business, putting in maximum effort and offering service with a smile is no longer a differentiator — it's mandatory. Poor customer support experiences can drive potential customers away in far greater numbers than any other inconvenience or roadblock in the purchasing process. Joe Jorzak, Head of Industry, Service & Support*

According to Yext research, **62%** of respondents say that they may purchase from a different company because a business could not answer their questions themselves (specifically on their site search) either occasionally, frequently, or very frequently.

Conversely, 56% of consumers say that they'll return to a business's website, versus a search engine, if the brand previously provided a direct answer to a question.

Consider the following comparison:

**Research** commissioned by Google, and conducted by 55 and Deloitte, monitored page load speed and conversion rates on 37 leading European and American websites across a range of industries. In retail alone, a *0.1* second improvement to mobile site speed grew conversion rates by 8.4%, and the average order value by 9.2%. Eliminating friction in the customer experience and improving speed of service (by merely a fraction of a second) can have a drastic impact on the customer journey, and ultimately, the sales that follow.

For the same reason, instead of speaking with a support representative or navigating a clunky website in an attempt to find information, customers now want to find the answers online themselves via FAQs, help articles, how-to videos, or a knowledge base.

CCW Digital research conducted one year ago found that 82% of consumers had become more comfortable using self-service than prior to the pandemic.

Despite this, there is still a stark disconnect between consumer engagement preferences and the satisfaction levels within each support channel. For example, consumers may be more comfortable using self-service (as an alternative to slow phone support), but are less patient when digital options aren't able to immediately give them the answer they're seeking.

According to a survey conducted by Yext, respondents indicated that some of the biggest issues with traditional help site search are an inability to understand questions (**60%**), unrelated search results (**53%**), out-of-date or inaccurate information (**39%**), and difficulty of use (**24%**).

Simply put, consumers are demanding effective self-service, but businesses are not meeting their demands. Despite the rapid advancement in technology, many of the same problems in customer service persist — largely because brands rely on outdated search technology to power key support channels such as help sites.

*Consumers want to find answers to their questions independently, but their preferred method of self-serve has let them down too many times, simply because most businesses aren't equipped with technology that's powerful enough. Marc Ferrentino, Chief Strategy Officer*

Investing in modern, AI-powered search can dramatically improve the customer experience while saving time, money, and resources. A recent study from CCW Digital research found that 62% of contact center, customer experience, and customer service leaders agree that customer-facing AI must improve in creating the contact center of the future, ranking it as the second greatest priority out of 21 categories (only behind remote or hybrid work options).

## THE NEED FOR ENTERPRISE SEARCH SOLUTIONS

Now more than ever, support agents have a challenging job. They are often the front-line resources of a brand and have to work with dozens of customers every day to resolve every issue imaginable. With the increase in self-service, consumers are now turning to traditional support channels when self-service is *not* able to fully handle a request, which leads to an overall increase in case complexity. Still, customers expect agents to be product experts and problem solvers; businesses want them to deliver empathetic, personalized support while balancing substantial case or ticket backlogs.

AI search can help agents efficiently respond to inquiries by understanding the intent of new case submissions and dynamically presenting the most relevant information from any resource. This is a vast improvement over the traditional approach to case resolution, which requires agents to simultaneously work out of several browser tabs to access resources from disconnected knowledge bases.

By deploying AI search across a brand's internal and external websites, apps, and support systems, both customers and agents are able to find information faster and get direct answers to their questions. AI-driven, enterprise search solutions not only empower consumers to self-serve and agents to solve cases; they enable customer service teams to focus on providing a high-touch experience that drives business, improves customer loyalty, and cuts costs.

*At the end of every support interaction, customers want to be happy. They want to feel like they got the answer or their issue resolved. Customers have always wanted this, but what has changed is the way we go about it. Shep Hyken, NYT and WSJ bestselling author, Customer Experience and Customer Service Expert, CCW Advisory Board Member*

## SAMSUNG CASE STUDY

### Company: Samsung

**Challenge:** The legacy search provider for Samsung's help site, Elasticsearch, was unpredictable and didn't always yield relevant results. "The reality is that sometimes it worked, and sometimes it didn't. Sometimes there was a bad experience waiting at the end for someone who searched," says Scott Messina, Director of Search Design & Strategy.

Messina's team soon recognized the need for a new search solution if they were to make any meaningful improvements to Samsung's online support experience. What they needed was an advanced, yet intuitive tool that came with a team ready to assist with implementation and continuous optimization.

**Solution & Result:** Samsung decided to transform its help site with Yext AI search. The global electronics company can now provide direct answers to natural language questions like "how do I reset my ice maker?" or "what temperature should my fridge be?"

Within eleven weeks of launching Yext Support Answers, Samsung saw significant growth in every major customer satisfaction metric across NPS score (+45%), CSAT (+33%), Issues Resolved (+15%), and surveys completed (8x+). All told, Samsung increased customer engagement with its help site by 19% — streamlining the path to resolution and delighting customers along the way.

"Switching over to Yext, not just for search but also for knowledge management, has freed us from all of the baggage and tech debt that we had built up over the years with Elasticsearch," says Messina. "Our KPIs have been moving in the right direction and we already have our eyes on other Yext solutions to further enhance the Samsung support experience."

## PEOPLE'S UNITED BANK CASE STUDY

### Company: People's United Bank

**Challenge:** As part of its comprehensive website redesign, People's United Bank sought out a search solution to improve its online customer support channels. "One lesson learned coming out of the peak pandemic — where there was a lot of pressure put on our call centers — was how essential it is to have an intuitive, informative web experience," says James Roy, Head of Digital.

The bank hoped to address other business challenges through the redesign, so they were primarily interested in finding a platform that offered multiple AI search solutions. Roy also wanted a vendor that could seamlessly integrate with his team's new CMS, Adobe Experience Manager.

**Solution & Result:** People's United added Yext AI search to its new website. Common search queries like "Where do I apply for a credit card?" and "How do I access my statements online?" now receive direct answers, which allows customers to independently resolve issues without resorting to a time-consuming, frustrating support interaction.

The launch of Yext Support Answers assisted in about a 50% and as much as 70% reduction in unnecessary support call volume in the months following the implementation compared to the months before. By integrating Yext and Adobe Experience Manager, People's United saw an estimated 15x annualized ROI on the platform for location entities alone — a number that rose to 35x annualized ROI when including locations, FAQs, and products.

"Before Yext, we had a very basic, out-of-the-box search experience. Now, our website has encountered a significant increase in search volume and instances of one-stop searches where people are actually finding what they're looking for on the first try," says Roy. "We've already seen some pretty impressive results from this technology partnership and expect to see even more moving forward."



## 4 WAYS TO TAKE YOUR DIGITAL CX TO THE NEXT LEVEL

We can certainly talk about how companies and customers are demonstrating unprecedented support for digital engagement. A **whopping 63%** reported an increase in digital touchpoints with customers during the COVID-19 pandemic. A **staggering 90%** confirm a willingness to use messaging or chat for at least some issues.

We cannot, however, celebrate the progress toward a digital transformation without acknowledging a sobering reality: satisfaction levels are not on the rise. Only 16% of consumers feel digital experiences have markedly improved over the past year, and an alarming 23% actually believe they have gotten worse. Companies, moreover, report considerably lower CSAT scores for digital channels than they do the phone, with messaging and chat bot interactions proving *especially* unsatisfying in today's landscape.

Consequently, it is time to change the focus. Companies no longer need encouragement to invest in digital; rather, they require guidance on how to improve their digital offerings. They need advice on how to create digital experiences that are not only tolerable but preferable for a breed of customers that demands convenience and personalization from each interaction.

By exploring four key focus areas, this briefing will provide the necessary guidance. It will help you take your digital experience to a new, more customer-centric level.

## FOCUS ONE: ADOPT A SINGLE VIEW OF THE CUSTOMER

Calls for a single, 360-degree view of the customer are inescapable in the customer contact realm. Success in achieving unity remains unfortunately elusive, with companies calling **the absence of a 360-degree view their most common technology challenge.**

Lacking such a view, companies are unable to recognize customers as they arrive at different touch points. As a result, they cannot sufficiently personalize interactions and have no choice but to deliver impersonal, transactional, ineffective service at a time when customer expectations are higher than ever. This challenge is particularly true in digital environments, where agents cannot use a friendly vocal tone to feign personalization. If the data is not available, the experience will *not* feel personal.

*“Digital channels often remain siloed, awkwardly bolted on to premises-based CC,” says Timothy Richter, Director of Product Marketing, Cloud Contact Centers at Twilio. “This means you had different teams responsible for monitoring different channels. These teams do not have a single view of the customer. They have access to different systems, different levels of training. This creates a disjointed experience for consumers and poor personalization.”*

Worse, because companies have no insight into what customers are *experiencing* as they move between channels, they cannot identify common pain points or popular customer intentions. Absent this insight, they are unable to streamline customer journeys, improve the routing process, or anticipate customer needs.

Collectively, these shortcomings ensure that customers will receive suboptimal experiences in digital and then immense friction when they try to escalate elsewhere. Adopting a 360-degree customer view, indeed, represents a pivotal step on the road to digital excellence.

*“The first step is to figure out how, for your company, you can get and maintain a single view of your customers and prospects,” advises Richter. “That is, in what software applications does key customer info reside that could potentially be useful when engaging with them. CRM? Billing? ERP? Scheduling software? Website/mobile app trackers? Ad impression data? Other? With this information, you can start your journey to create hooks into these key systems to start building a single view, say in the contact center application user interface, for customer-facing agents and employees.”*

Upon unifying and democratizing this intelligence, companies can tailor and optimize experiences for all customers. Instead of delivering the FAQ pages or lifeless chat interactions of yesteryear, companies can create highly valuable experiences in all digital touch points. Resolution rates will rise, and customer trust will soar.

## FOCUS TWO: MAKE OMNICHANNEL AN OPERATIONAL REALITY

If only the disconnect were *just* about customer data.

The truth is that few of today’s contact centers are built for omnichannel engagement. As the Market Study reveals, disconnected systems and disconnected channels are the top two pain points facing the customer contact operation. Unsurprisingly, **only 18% of companies identify their contact center as “omnichannel.”**

What creates so much disconnect within the contact center environments? For starters, companies do not approach the omnichannel experience with a cohesive operational strategy. The relevant teams for different channels are siloed, and they all have different objectives, priorities, and resourcing.

And even if the company *wants* to unify its operation, it may not have the necessary platform. Far too many companies rely on legacy systems that require them to “bolt on” new digital offerings. These increasingly fragmented platforms prevent employees from seamlessly supporting different channels from the same interface. A failure to unify the contact center with broader enterprise systems exacerbates the challenge by inhibiting team coordination and data democratization.

Companies, therefore, require a two-fold solution. The first step involves adopting an overarching “customer experience strategy” that establishes a common set of metrics and objectives. This process also involves creating a team of overall customer experience agents — as opposed to channel-specific employees — whose job is to provide the best possible support wherever customers choose to engage.

By subsequently migrating to a cloud contact center platform with seamless access to all channels, knowledge, and workforce tools, the company will further reduce friction while further increasing operational alignment.



*“Ensure all different channels can be handled by the same staff, from within the same contact center software,” recommends Richter. “Digital channel bolt-ons have fragmented customer experiences and frustrated IT teams with having to manage multiple apps. Instead, if all staff can handle all channels, with the right personalization, customer satisfaction has a high probability of improving.”*

## FOCUS THREE: DESIGN EXPERIENCES FOR THE DIGITAL WORLD

The call for *consistency* throughout the customer journey has produced a misconception that all channel experiences should be identical. As a result, companies attempt to create digital experiences that mirror their traditional phone offerings. They declare victory when their messaging or chat environments are “good enough” to absorb some call volume.

This pitfall ignores a simple reality: all channels are fundamentally different. They each offer distinct capabilities, with value propositions that uniquely appeal to different customers at different times. Instead of ignoring these distinctions, customer-centric companies embrace them. They design experiences that play to the unique strengths of each channel, ensuring that customers will receive the maximum value wherever they connect.

Successful digital experiences, for example, make use of digital-centric capabilities like geo-location, biometric authentication, automated responses, visual menus, co-browsing, media sharing, augmented reality, proactive notifications, conversation logging, and encrypted credit card processing that are not available in the voice world. When customers start to appreciate the unique value they receive in digital channels, they will no longer simply tolerate them as ways to avoid long phone hold times. They will actively select them for certain use cases, in the process developing a strong affinity for how well the business knows and treats its customers.

If there is something that should be consistent across channels, it is access to helpful agents. The agents with whom one interacts in messaging should be as empathetic, knowledgeable, and efficient as those in chat, email, and voice environments. Companies cultivate this degree of human support by training agents on soft skills, preparing them for the conversational quirks of each channel, and *empowering* them with intuitive tools and 360-degree views of customers.

## FOCUS FOUR: BUILD OPERATIONS FOR THE FUTURE

The COVID-19 pandemic offered an important reminder: the customer contact landscape can change on a moment’s notice. What cannot change, however, is the company’s preparedness to empower agent productivity and deliver engaging customer experiences.

*“The most successful companies always do 2 things really well: constantly inspect and continually adjust. Contact centers should be no different,” articulates Richter.*

This idea of being flexible and forward-looking is particularly essential in the digital realm. Although it is not an entirely new form of communication, digital engagement is still in its relative infancy. New channels are still emerging, best practices are still developing, and customer comfort levels and preferences are still rapidly evolving. The ways customers choose to engage, and the channels in which they choose to have those conversations, will continue to change in the months and years ahead.

The ramifications of the ever-changing state of digital engagement are clear. First and foremost, companies require flexible platforms for not only adding and integrating channels but adjusting resourcing in real-time.

As part of this endeavor, leading companies will adopt flexible staffing models that allow them to leverage “gig” and “part-time” talent to fill urgent needs in their customer journey. By simultaneously deploying automation to handle as many repetitive and transactional tasks as possible, the company will not only streamline the training process (and then shorten ramp time) but also keep these agents free to focus on the more complex, less predictable work that will emerge as the landscape changes.

More broadly, companies will also want to think about how evolutions in digital engagement will affect the overall customer journey.

A surge in messaging volume, for example, may correspond with a decrease in overall call volume. The phone conversations a contact center does have, moreover, may begin to skew toward certain demographics or issue types. That change will, of course, have ramifications for how the company manages staff workflow and training

Success does not, however, simply involve leaders *anticipating* future agent needs and challenges. It also involves incorporating employees into the design process, ensuring decisions are driven by their personal expectations and front row view of the customer experience.

*"We at Twilio are starting to see a completely new trend: companies actually involving their agents in solution design," shares Richter. "They run focus groups and ask employees what access to different systems they need to be more effective. We have numerous customers like EZ Cater and Travel Perk who have done this with great success. There is no better way to empower and motivate employees than to simply ask them what they need. No one knows better than those who are on the front lines with customers every day - certainly not hired vendor professional services teams."*

## SUCCESS IN PRACTICE: THE BENEFITS OF A NEXT-LEVEL DIGITAL CX

For many years, customer contact leaders faced a call to be where their customers are. Today, they face a new call: to be exceptional wherever their customers are.

Digital engagement has become commonplace within most industries, eliminating any competitive differentiation brands hoped to derive from simply offering a multitude of channel options. Exceptional digital experiences and seamless omnichannel journeys nonetheless remain elusive; brands that reach that level stand to create lasting customer loyalty.

They will also enjoy a plethora of internal benefits, from impressive cost efficiency to unprecedented employee productivity and satisfaction.

By partnering with Twilio, leading brands are shortening the pathway to a next-level digital customer experience — and all the benefits that come with it. Example success stories follow.

### Company: TravelPerk

**Challenge:** TravelPerk was using an array of different tools for communications, context, and actions. This fragmentation prevented agents from seamlessly accessing information, leading to an inefficient employee experience. Without unifying everything into a one-stop-shop agent workstation, the company had no chance of delivering 7-star service.

**Solution & Result:** To address its challenge, TravelPerk used the highly customizable Twilio Flex platform to create its Lighthouse contact center platform.

TravelPerk initially focused on chat, using Flex to create a singular screen in which agents could see their various contacts on the left, the specific chat conversation (with room for internal notes) in the middle, and necessary context on the right.

TravelPerk subsequently harnessed the power of Flex to streamline the chat experience for customers (such as by using pre-qualification to anticipate customer needs and minimize back-and-forth), before incorporating phone conversations into the Lighthouse console.

Moving forward, the company plans to further centralize and optimize communications using Lighthouse.

### Company: ezCater

**Challenge:** The business catering company wanted to quickly improve customer and agent satisfaction while creating unique agent add-ons.

**Solution & Result:** Twilio Flex, and its plugin capability, turned ezCater's needs into realities.

One plugin helped optimize agents streamline their after call activity. By popping up a message when the agent was spending too much time on such tasks (while also offering a "snooze" button when necessary), the plugin helped agents improve their focus and efficiency. Wrap time fell by 16%, enabling agents to serve more customers.

Another successful plugin used a "food level alert threshold" to keep agents in the loop about escalating call volumes, all at once creating a sense of fun for the catering company's employees and keeping critical contact center metrics in check.

**Company: Prometric**

**Challenge:** The COVID-19 pandemic forced many in-person businesses, including testing companies, to pivot to remote operations.

As an industry leader in test development, testing delivery, and candidate services, Prometric aimed to optimize the remote assessment experience. Specific considerations included ensuring scalability, increasing agent support and productivity, strengthening remote video quality, and guaranteeing security.

**Solution & Result:** Engaging with Twilio partner Greyshore Associates and the Twilio professional services team, Prometric relaunched its remote ProProctor solution using Twilio Flex and Programmable Video.

In addition to quickly accommodating Prometric's UI needs, the scalable setup empowered an 80% increase in concurrent test session capabilities.

It also drove an increase in audio and video quality, which is an essential part of a great remote test experience; Prometric and its customers enjoyed a 50% decrease in dropped connections.

Prometric also enjoyed other advances, such as increase in self-service testing features, productive video chatting with live agents, and access to robust analytics to measure and further improve all facets of the experience.





## THE CONTACT CENTER HAS CHANGED, NOW IT'S TIME TO TRANSFORM CX

After years, if not decades, of hype, companies spent 2020 and 2021 accepting the importance of modernizing their contact center platforms. They embraced the cloud's role in fostering a more agile, upgradeable, and scalable contact center function. They recognized the need to deliver omnichannel experiences that cater to the increasingly digital-first marketplace. They also adopted remote and hybrid workflow models that transform the contact center from a physical place into an operational concept.

No, not every organization has made every one of these changes. Many remain on legacy systems, some continue to disproportionately focus on one or two

channels, and some are still struggling to define a future work environment. The Market Study, after all, confirms that **disconnected systems** and **disconnected channels** remain the contact center's two biggest operational pain points. **Debates over the future work environment keep 48% of contact center leaders up at night.**

These pain points aside, most companies are now nonetheless accepting the new look for the contact center. Some may still be contemplating *how and when* they will initiate their migration to an agile contact center framework, but few are disputing that they should.

Therefore, it is time to focus on the next chapter: leveraging the modern contact center infrastructure to truly transform the CX. Companies now have the ability to deliver the kind of optimized CX that once seemed unobtainable, and this briefing will reveal how to seize the opportunity.

## UNIFYING THE CONTACT CENTER OPERATION

Among its many benefits, the cloud contact center offers one particularly powerful advantage: the ability to expand capabilities without disrupting the cohesion of systems. The days of companies needing to gracelessly “tack on” additional functions or data sources are over; the modern contact center platform allows them to weave in upgrades and expansions.

Companies aiming to transform their CX will leverage this capability to grow and scale as needed. They will centralize all relevant systems and data repositories in their contact center platform, instantly eliminating the friction and fragmentation so common to legacy operations.

*“Delivering convenience without sacrificing personalization and humanity comes down to understanding customers and making their experience seamless,” says Daniel Murillo-Vargas of Talkdesk. “A big part of that is having accurate information to form a true view of the customer. To achieve this, all technologies and repositories must be comprehensively integrated with the contact center.”*

With all insights and tools in a singular platform, employees from all teams — in all possible work locations — will gain the ability to seamlessly, and meaningfully, perform vital customer contact tasks. Operational inefficiencies will vanish as employee and customer experiences improve.

And with issue complexity rising at the same time agents are increasingly working unorthodox schedules in distributed, autonomous environments, the opportunity to centralize knowledge is particularly vital.

*“Integration with other systems, such as knowledge bases, helps companies provide the guidance and onboarding necessary to create a positive and efficient environment for their staff,” adds Murillo-Vargas.*

## MAKING OMNICHANNEL A STRATEGIC REALITY

More than helping to centralize tools and systems, cloud-based contact center platforms also support an integrated channel experience. With the ability to easily add and integrate new channels in the platform, companies no longer have to patch together touch points as customer behavior evolves and contact volume shifts.

The omnichannel revolution is not, however, merely a matter of unifying all channels in a single platform. It also requires mapping and orchestrating journeys to ensure customers can consistently and effortlessly get the help they need, where and when they need it.

*“Due to the dramatic shift to online for most industries, customers may start out in one channel then seamlessly move to another in the course of a single interaction,” articulates Murillo-Vargas. “Therefore, companies need to be able to interact with customers through any combination of channels.”*

If a company wants to provide customers with value at all touchpoints, it has to sufficiently empower its employees to deliver said value. Agents require access to real-time data, unified knowledge, and personalized training that will allow them to seamlessly support customers throughout the journey.

*“Agents will play an essential role in meeting customers’ omnichannel expectations, but they can only succeed if they have the right data, context, and capabilities to understand customers and provide the quick and personalizable experiences sought today,” says Murillo-Vargas.*

Beyond providing agents with the tools to support the omnichannel customer, forward-thinking companies will re-evaluate team workflow and dynamics. If employees are not already directly responsible for covering different channels, they should at least be able to seamlessly collaborate with those who are. Any fragmentation *within the contact center* will manifest as additional effort and frustration for the customer.

A successful omnichannel experience also involves establishing metrics for both individual channel experiences and the journey at-large. The asynchronous nature of messaging, for example, yields different average handle times than would be ideal for a real-time web chat conversation. A rise in customer self-service rates may, meanwhile, impact the volume and type of calls that reach phone agents.

The unification of all channels should, moreover, drive a widespread reduction in customer effort and an overarching increase in customer satisfaction and loyalty.

## UNLOCKING THE POWER OF CUSTOMER DATA

When all contact channels and systems are unified in a single platform, the door opens to the contact center's most valuable asset: robust customer data.

Modern contact centers can leverage modern, AI-driven analytics tools to unlock actionable insights from all customers and interactions. Customer-centric ones will make the most of this intelligence, leveraging the data to improve agent performance in real-time, continuously update and refine knowledge bases, redesign customer journeys, elevate chat bot and IVR capabilities, and personalize all customer conversations.

*"What companies should expect from their data is that it is available, accurate and timely so it can be used to craft a clear and true view of the customer," contends Murillo-Vargas. "Achieving this requires that companies can seamlessly integrate their contact center with other systems to quickly provide complete and up-to-date customer information to their employees."*

Arming customer contact center agents and strategists with insight into *who* they are serving will instantly, and significantly, elevate the experience. The power of data does not, however, stop there. Modern analytics and knowledge platforms help companies not only *anticipate* customer intentions and sentiments but provide agents with next-best action recommendations based on those predictions.

With this guidance at their disposal, agents will not only be able to deliver more accurate and relevant support but devote more mental energy to conversational tone and relationship-building. The resulting experience will be more helpful and engaging, two essential factors in the era of customer centricity.

## OPTIMIZING AUTOMATION AND HUMAN INGENUITY

A scalable, cloud-based contact center platform is conducive to automation, whether in the form of customer-facing AI, intelligent data analysis, or backend process automation. The best companies take advantage of this opportunity.

By strategically incorporating chat bots into their customer journeys, these organizations increase the efficacy and availability of self-service. While providing a more convenient experience for customers, AI-driven bots reduce the time agents spend on simple, repetitive customer tasks. Employees can consequently focus on higher-value, more complex interactions that make better use of their human ingenuity.

AI does not, however, simply allow agents to focus on more complex tasks. It also makes them better at said tasks. By gathering more actionable insights from interactions, more intelligently routing customers to the most suitable agent, and simplifying knowledge access through knowledge base optimization and in-call guidance, AI greatly reduces the need to ask repetitive questions or search for complicated answers.

Other agent-centric use cases involve automating rote processes like call logging and data entry, unlocking intelligent scheduling and forecasting, and delivering real-time training.

The latter two carry particular value in the changing workforce landscape. With a system for more accurately and intelligently devising schedules, companies can take advantage of more flexible, gig-based work models. They will gain access to a wider pool of talent and optimize agent adherence and utilization rates.

In addition to helping remote agents get up to speed without face-to-face guidance, real-time, AI-driven training provides ongoing development. Lessons can be instantly delivered based on a specific agent's strengths and weaknesses, facilitating effective coaching even when the supervisor cannot physically hear an agent's mistakes during calls.

While directly boosting employee productivity, each of these use cases *also* leads to a simpler, more fulfilling employee experience. The importance of that result cannot be understated. Beyond directly driving customer happiness, agent happiness is a paramount operational goal at a time when **high agent attrition** ranks as the #3 contact center pain point.

“Agents need solutions that emphasize their own experience, and allow them to work on a single screen to make their work easier and more logical while providing them with accurate customer information — no matter where they are,” declares Murillo-Vargas. “Solutions that are able to seamlessly provide remote workers with these capabilities while automating workflows across applications and facilitating workforce management will be highly sought after to allow agents to perform optimally.”

## **CX TRANSFORMATION IS NEVER COMPLETE**

The typical customer contact function has numerous shortcomings to address, pain points to remedy, and gaps to close. It absolutely has to build a framework that supports a modern workforce, omnichannel engagement, effective data analysis, and artificial intelligence.

A successful customer experience transformation is not, however, merely about playing catch-up. It is not simply about rising to the standards set by today’s customers, employees, and business stakeholders. Instead, it is about building a customer contact function that can swiftly and effectively adapt whenever those standards inevitably change.

The aforementioned steps facilitate this forward-looking, future-proof approach to the contact center.

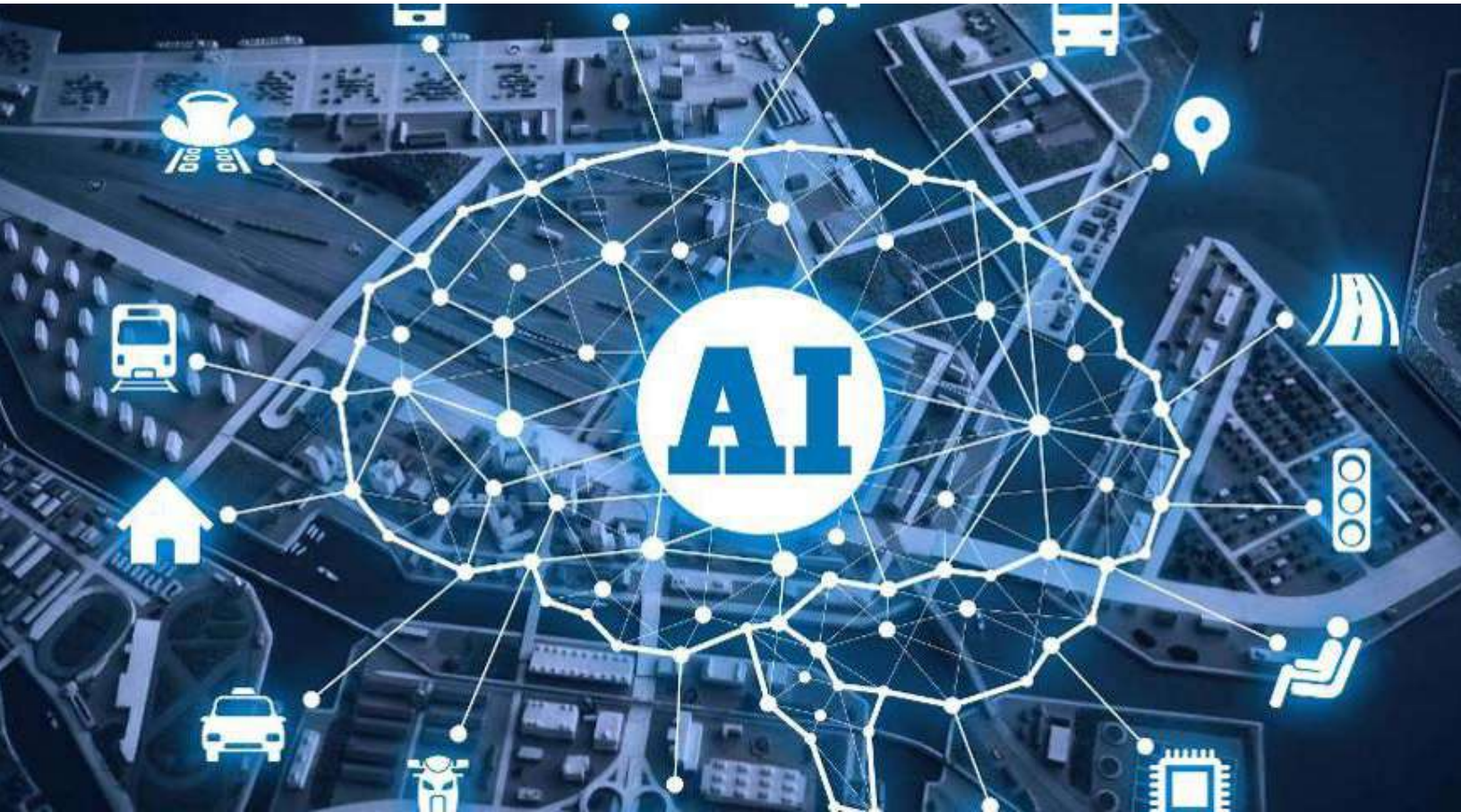
By unifying the customer contact operation into a single, cloud-based platform, the company guarantees that all systems and team members will possess the scalability, flexibility, and upgradeability to conquer the challenges of tomorrow.

By developing an omnichannel framework, the company ensures its readiness to respond to customers no matter how their conversation preferences and habits evolve in the future.

By adopting a more robust approach to customer data, the company strengthens its ability to understand and even predict future changes in customer needs and behaviors.

By striking the optimal balance between automation and humanity, the company maximizes the resources it has to not only respond to changes but proactively become more customer-centric -- and more operationally efficient -- with each passing day.





servicenow.

## 80:20 | THE FUTURE OF AUTOMATION IN THE CONTACT CENTER

For today's empowered, digitally savvy consumers, the customer experience matters more than it ever has. For brands hoping to attract and retain customers, the drive to compete on the experience therefore continues to intensify.

This ever-growing focus on the customer experience ensures that the contact center, the truest gateway between a brand and its customers, is here to stay.

Granted, the contact center of the future will not precisely resemble the one most business leaders have long come to know. After spending two years witnessing the viability of work-from-home, the overwhelming majority of companies are preparing for hybrid (if not fully remote) contact center models. Only 12% anticipate returning to a primarily on-site approach.

*"The contact center will continue to be one of the key pillars and nexus points of customer engagement moving forward," trumpets Rob Muro of ServiceNow. "The customer journey will always require that the contact center exists even if it's predominantly virtual. It's the company's responsibility to ensure the contact center evolves with the customer."*

Nearly all companies, including ones that are planning to return to the office, are meanwhile re-evaluating the roles automation technology and human employees will play in their contact centers.

*“In the contact center of the future, 80% of issues reported by users will be handled by customer facing and predictive issue resolution AI,” explains Muro. “The 20% of issues that will continue to be handled by agents will be due to issue complexities that require longer AI model training. Agents can offer premier servicing levels to companies whose users will pay for additional white glove services fulfillment.”*

This briefing will reveal why the 80:20 rule suits the customer engagement landscape of today and tomorrow. It will then reveal the keys to a successful automation strategy, before concluding with case study insights from two globally recognized brands.

## WHY 80:20 IS THE ANSWER

Predicated on the notion of operational efficiency and doing more with less, automation technology naturally appeals to business leaders. The promise of streamlining or even eliminating tedious tasks surely resonates with contact center employees of all seniority levels.

Ultimately, however, the viability of automated engagement hinges on the answer to another question: does it add value for customers? The answer to that question is a resounding yes.

Consumers have grown immensely more willing to self-serve in recent years; per CCW Digital's 2021 Consumer Preferences Survey, only 14% still desire an agent for all issues. This growing comfort with self-service opens the door to automated engagement like chatbots and intelligent IVR platforms, particularly for transactions, informational queries, and basic support issues.

As they grow more comfortable with digital-driven conveniences, consumers are simultaneously becoming more cognizant of speed and effort. Sixty-eight percent (68%) of consumers cited “long wait times” as a frequent pain point in CCW Digital's 2021 Consumer Preferences Survey. The figure actually represents a significant increase from the 2020 number (56%), which came at the height of the COVID-19 pandemic when challenges related to call volume and resourcing were significantly more prevalent.

This development explains why AI-driven automation will not simply be acceptable but preferable for customers. The opportunity to successfully self-serve, or at least meaningfully begin the engagement process prior to

reaching a live agent, resonates with an audience that is simultaneously developing higher expectations for service and less patience for waiting.

The impact of the 80:20 rule is not, however, merely about increasing the availability of self-service for digitally savvy customers. It also helps companies elevate the quality of all interactions, including those that will still require an agent.

By taking the lion's share of simple interactions off agents' plates, automation technology helps employees focus more intently on complex ones. As a result, customers who truly require live agent guidance will no longer have to endure excessive wait times. They will also be engaging with someone who has more time, freedom, and mental capacity to navigate their complex issues and demonstrate warmth and empathy throughout the conversation.

Weaving automated self-service into the journey also improves data collection and management. Bots will help capture more actionable intelligence on the front line and intelligently route customers to the right agent, further strengthening the employee's ability to deliver personalized, relevant, timely, and engaging support. Additional backend automation, such as knowledge base cleansing, workflow optimization, and next-best action guidance, will amplify agent performance in the moment of truth.

Best of all, this automation model ensures the quality of agent-led interactions will grow over time. Upon achieving an 80:20 balance, contact center leaders can begin to hire and coach based on high-value factors like critical thinking and empathy, as opposed to robotic process and script memorization common to yesterday's contact center. Agent performance will rise as ramp time falls, leading to better (and faster) interactions for customers.

Indeed, 80:20 is the pathway to ensuring 100% of interactions are both as frictionless and valuable as possible.

## KEYS TO SUCCESS

Despite many years of hype over automation technology, few organizations are deriving meaningful returns from their investments. Even fewer have reached the coveted 80:20 balance between automated and human-led interactions.

The promise of automation does not, however, have to remain elusive. By adopting the following principles, companies can quickly bring the power of automation to fruition in their customer journeys.

## Ensure Customers Define the 80%

In a counterintuitive habit, many businesses make customer experience investments without considering the will of the customer. This pitfall has been particularly common with regard to automation and self-service. Thirsting for efficiency gains, leaders aggressively impose self-service on unwilling customers at inopportune phases of the journey. Inherently frustrating to customers (who identify forced self-service as the #4 pain point), this effort rarely produces successful interactions. Customers end up having to escalate to an agent, negating the efficiency gains the business was pursuing.

To succeed with automation, the best brands will break from this trend. They will evaluate customer feedback and interaction analytics to determine the optimal use cases for self-service.

Businesses that tailor automated engagement to the will of their customer stand to gain higher self-service utilization and containment rates, while creating a perception of customer centricity. Efficiency and customer satisfaction will soar.

## Design For Context

Although leading automation solutions are technically ready for primetime, customer-centric brands do not settle for plug-and-play. They consider the intricacies of their customer base, the nuances of their typical support issues, and the unique aspects of their products and processes when identifying and tailoring *contextual* AI solutions.

*“Even the most sophisticated AI driven and automated experiences will require humans to build them first,” declares Muro.*

By combining design-thinking and real-time tuning, companies create automated self-service experiences that feel personalized to their customers and faithful to their brand values. Buoyed by the conversational and cognitive abilities of AI, this design-driven automation creates more value for customers. It sends the message that the company is trying to empower customers to solve problems on their own rather than deflect them to a static FAQ page to cut costs.

## Rethink Agent Workflow

As companies define the 80% of interactions they can automate, they also have to account for the 20% of interactions that will command focus from agents.

They have to redesign workflow — and potentially recalibrate training — to account for the new types of interactions and customers their agents will need to support.

Leading companies will also recalibrate processes, notably with regard to potential escalations. Since many customers will be spending time in self-service environments *before* reaching live agents, they will expect agents to better recognize their situation and more rapidly progress to solving their problem. Agents will need seamless access to this contextual data *and* better training on how to quickly progress from greeting customers to solving their problems.

## Redefine the Role of the Agent

In its simplest sense, 80:20 operationalizes the notion of letting “AI handle simple tasks so agents can focus on complex ones.” This model can only work if agents are ready to handle complex tasks.

Because the role of the agent has historically been somewhat robotic — reading scripts, processing basic transactions, following clearly defined policies — contact centers have not necessarily hired, let alone coached, for high-value work. That will need to change to support a future in which agents address unexpected problems, deliver creative resolutions, and aim to build meaningful *relationships* with customers.

Per CCW Digital’s Customer Contact Industry Review, the agent of the future will be empathetic, friendly, comfortable in all channels, able to master complex products, and comfortable with different types of customer requests. From knowledge content creation, to hiring, to onboarding, to coaching, contact centers will have to re-evaluate agent engagement strategies to cultivate this type of agent.

*“I see a growing blend of strong communication and interpersonal skills that are necessary to promote a white glove level of service and align to enhanced service level agreements with customers,” adds Muro with regard to the future of contact center agents. “Also, I believe human workers will need to expand their technical proficiencies into areas like cloud architecture and engineering to support complex digital ecosystems that span globally with different regulatory requirements. AI and machine learning are crucial to support other customers embarking on similar digital transformations. Data science and analysis as customer data becomes a new digital currency that powers insights and automated workflows.”*

## Align all Systems

A bot cannot automate or analyze interactions without seamless access to key customer and operational data. An agent cannot masterfully handle an escalation without clear insight into the customer's profile, preferences, intentions, and sentiments. No business can optimize its customer journey without a sense of key pain points and inefficiencies.

Collectively, these statements underscore the importance of *unifying* all systems.

The Market Study identifies disconnected systems and channels as the top operational pain points affecting today's contact centers. A company cannot make the most of its AI investments, let alone achieve the 80:20 balance, without overcoming this lingering challenge.

*"The contact center of the future must be multifaceted and truly omnichannel," says Muro. "Furthermore, it's crucial to connect more closely with departments and teams outside the contact center to get end-to-end visibility into the resolution process. Otherwise, you will continue to have a fragmented CX without an aligned customer journey and unified delivery plan. It's not only about connecting across channels; it's about connecting and integrating across other teams to service the end-customer. Without visibility into end-to-end processes, CX suffers."*

## Seize Internal Automation Capabilities

Every aspect of customer-facing automation — chatbots and virtual assistants, seamless authentication, intelligent routing, proactive knowledge recommendations, data analysis — can also function as an *employee-facing* opportunity.

Leading companies take advantage of this reality, ensuring that they use automation to streamline agent workflows, provide seamless access to knowledge and real-time intelligence, and quickly process customer requests and transactions.

Without automating the internal experience, the company all but assures that the 20% of agent-led interactions will be impersonal, inefficient, and ultimately ineffective.

## SUCCESS IN PRACTICE: LESSONS FROM 7-ELEVEN AND THE NBA

Whether via conversational chatbots, smarter escalation processes, better data collection, or workflow optimization, an intelligent automation model can elevate all facets of the customer contact operation. It will yield simpler and more effective customer and employee experiences, while driving measurable increases in business metrics.

Not simply theoretically sound, the model is proving immensely effective in practice. Iconic retailer 7-Eleven offers a front row seat to the impact; it used the ServiceNow Customer Service Management platform to not only unify its omnichannel journey but *automate* key facets of customer interactions and agent workflow. Resolution rates rose as response times fell.

The NBA turned its effort inward, using advanced technology to improve workflow and assure safety in its standard-setting COVID-19 "Bubble."

Additional details on each case study follow.



**Brand: 7-Eleven**

**Objective:**

7-Eleven aimed to create a more convenient, more frictionless experience that yielded first contact resolution for customers.

As part of this effort, the iconic brand understood the importance of empowering agents to better connect with customers.

Although reducing customer effort and improving the support experience likely *would* yield an increase in efficiency, 7-Eleven prioritized quality over raw speed.

**Solution & Result:**

Along with leveraging Medallia to better understand customer needs, 7-Eleven adopted ServiceNow Customer Service Management to create the 7-Help desk.

The platform unified 20 different help desks to provide a single platform for customers and franchisees the ability to report issues.

Boasting omnichannel capabilities, the platform also ensured customers could engage in their preferred channel.

Intelligent routing capabilities enhanced the process, quickly classifying and prioritizing cases and then directing customers to the right agent or system.

Arousing success, the effort yielded a 205% increase in resolution rates and a 93% reduction in case volumes. Response times are also down by 75%.

**Brand: NBA**

**Objective:**

To resume the NBA season and support a full WNBA season during the COVID-19 pandemic, the NBA famously created “bubbles” at Walt Disney World and IMG Academy.

More than just about finding a location, the effort involved creating safe and secure environments while controlling access and health screening for thousands of players and personnel.

**Solution & Result:**

The leagues leveraged numerous ServiceNow solutions — Safe Workplace Suite, HR Service Delivery, Customer Service Management, and Field Service Management — to create an integrated nine customized workflows for screening, tracking, and access-granting.

The workflows helped process 13,000 essential documents in a secure and user-friendly environment.



## VOICE OF THE CUSTOMER: THE KEY TO ENGAGING AGENTS IN A REMOTE WORLD

Agent engagement was difficult in the traditional contact center, and it has become particularly challenging amid the rise of remote work. Employees are now literally isolated from one another, which inherently inhibits peer interaction, supervisor engagement, and operational culture-building.

*“Today, contact center teams are not only further removed from the brand they’re providing service for, but are far removed from their fellow agents,” shares Rachel Lane, Solution Principal, Contact Center, Medallia. “At the same time, the struggle with burnout is real. For the virtual contact center and remote customer service teams of today (and the future), it’s imperative that businesses find ways to continue to authentically engage their agents.”*

This engagement challenge is emerging at a time when the standard for the agent experience is higher than ever. The extended COVID lockdowns caused many employees to reevaluate their ambitions and self-worth, and the rise of remote work has given them access to exponentially more career options. In turn, they are seeking a more fulfilling and supportive work experience.

The challenge is also arising at a time when the standard for agent performance is skyrocketing. The stakes of their work are higher than ever, with 60% of consumers saying they now place an unprecedented importance on the customer experience. Growing comfort with self-service, moreover, means that the interactions agents handle will involve more complexity and require more human ingenuity than ever before.

Remote work is not a passing fad; the Market Study confirms that only 12% of companies plan to revert back to the traditional, wholly on-site contact center model. The overwhelming majority of companies, therefore, have to swiftly determine how to unite workers who are separated by physical distance.

The voice of the customer (VoC) will play a pivotal role in this process, and this briefing will reveal why. More importantly, it will reveal how to leverage customer intelligence to not only create unprecedented engagement but drive unparalleled contact center performance.

*“When captured and used properly, VoC data has the potential to transform your front-line contact center team, empowering them to better understand customer needs and creating more valuable insight for your business across the entire organization,” articulates Lane.*

## THE POWER OF PURPOSE

Culture was not about pizza parties and ping-pong tables in the physical office, and it will not be about virtual happy hours and trivia nights in the remote world. Real culture, the kind that propels a customer contact operation to meaningful success, is about rallying employees around a clear and meaningful purpose.

Increasing customer satisfaction and loyalty represents one such purpose. First and foremost, it is of utmost importance to the business — the Market Study confirms satisfaction and loyalty as the biggest ways a contact center can demonstrate value. It also speaks to the idea of a “connection,” which is an inherent source of joy and motivation for all humans.

As the blueprint for driving customer satisfaction, VoC fuels this objective. By revealing who one’s customers are, what they intend to achieve, how they choose to engage, and how they feel about their interactions, the intelligence tells the company — and every single employee — what to do when designing and delivering the customer experiences. Aware of what they need to do, and how their work fits into the big picture, employees no longer feel as if they are completing tasks in isolation. Instead, they feel *engaged* with their fellow team members.

By essentially putting a face and name to the number, VoC also helps bring the customer experience to life. Employees gain appreciation for the *real* people they are serving, and the *real* importance of their jobs. Such a perspective can be immensely engaging and motivating, particularly for generations of employees who aim to make an impact beyond what can be measured on an income statement.

### Keys to success:

- Collect robust intelligence in the form of qualitative survey research and analytics from all interactions.
- Afford *agents* an avenue for sharing their own feedback and experiences, giving them a sense of ownership over the customer contact operation.
- Leverage AI to analyze the data, and provide frontline employees with real-time insight into aggregate CX trends and individual customer needs.

## THE POWER OF PERFORMANCE

VoC is not simply a window into what customers are feeling and experiencing; it is also a measure of how employees are performing. Customer data, whether in the form of survey feedback or behavioral analytics, reveals whether agents are providing fast, friendly, and accurate support.

Democratizing this performance data plays a crucial role in elevating agent engagement.

For starters, when agents see the positive impact their work has on customer satisfaction, they derive a sense of victory. They feel a pay-off for the work they put into mastering scripts, learning new systems, dealing with the occasional angry customer, and participating in coaching sessions. In turn, they feel more *engaged* with the company and its processes.

*“By collecting customer feedback about service interactions and sharing Voice of the Customer data not only with executives, but with each agent, contact center teams can gain a first-hand look at the value they’re providing your customers,” offers Lane. “Sharing positive feedback and reviews from your customers can serve as great motivation to agents, which will not only help them feel more engaged in their role, but also underscore the value they bring to the business and highlight that what they’re doing really makes a difference.”*

At the same time, they gain objective insight into where they are going wrong. Beyond giving them mental motivation to improve, this intelligence helps them diagnose their specific challenge areas. They can subsequently seek out assistance from peers, supervisors, and other internal experts, opening the door to new engagement (and relationship-building) opportunities.

Beyond offering agents a window into their own performance, VoC intelligence can keep them dialed into how their peers are performing. Whether in the form of general scoreboards or gamification activities, this insight builds an engaging sense of camaraderie and friendly competition among the team. It also helps employees identify potential role models and mentors, as well as peers whom they can help coach, which further creates connections even in a distributed work environment.

*"In this remote work environment where feelings of isolation can create chasms between brands and their front-line teams, collecting direct customer feedback can help keep agents engaged in their work, motivated to bring their 'A' game to each customer interaction, and plugged into their organizations' customer success strategies," says Lane.*

### Keys to success:

- Provide agents with real-time performance scorecards and sentiment analysis so that they can directly witness the quantitative and qualitative impact of their work.
- Leverage gamification to keep employees abreast of overarching goals and how their fellow agents are performing.
- Leverage AI solutions to analyze data and identify actionable improvement opportunities.

## THE POWER OF COACHING

VoC intelligence does not simply help agents feel more connected to the business. It also helps supervisors better connect with their reports, even when they have little or no face-to-face interaction with said employees.

Without the ability to "look over their agents' shoulders" or "hear mistakes in real-time," supervisors are entirely reliant on data to identify performance gaps and coaching opportunities. Granted, when the data is *effective*, they gain a more objective, all-encompassing window into performance. The days of arguing about whether one random call recording tells the whole story are over; supervisors have an irrefutable sense of their team members' coaching needs.

Thanks to VoC insights, supervisors can deliver timely, more deliberate, more personalized coaching. And insofar as the agent will also have access to data confirming their performance gaps, they will be more receptive to the coaching. The training interactions will therefore be more efficient *and* meaningful, minimizing total training time while maximizing the value of coach-coachee interactions. Performance will improve, and the bond between employees and leaders will grow stronger.

*"Using tools like Stella Connect by Medallia, you can see team performance at a glance for the metrics that matter most to your business - like CSAT or CES - and drill down by individual agents to see where someone is performing well, and where they might need additional training or support," shares Lane.*

In addition to boosting one-on-one coaching, VoC data creates more productive group training. Supervisors can more quickly and accurately identify team-wide knowledge gaps, and therefore give value to group meetings or Zoom calls. With added purpose, these sessions become more engaging, interactive, inspiring get-togethers that achieve symbolic closeness among the physically distanced.

*"By empowering agents with real-time feedback and developing customer service training programs specific to each individual or team, you can intentionally create opportunities for agents to be effective and really see the overall value and business impact of the work they're doing each and every day," adds Lane. "That effectiveness increases engagement."*

### Keys to success:

- Leverage modern analytics solutions to uncover the specific skill and knowledge gaps that are *most notably* impacting agent performance and customer satisfaction.
- In addition to accounting for VoC data, incorporate *agent feedback* in the coaching process to ensure employees feel their needs and concerns are being heard.
- Do not simply use data to inform coaching; use data to *assess* coaching to identify the most effective training styles moving forward.

## THE POWER OF KNOWLEDGE

With shorter ramp times, less in-person guidance, and less access to internal experts who can “save them” in the face of challenging calls, employees are more reliant than ever on knowledge bases. This reliance will only grow as companies pursue part-time “gig work” models, which will put people with *minimal* brand familiarity in high-stakes customer interactions.

The changing engagement landscape, moreover, means that it is not enough to centralize access to the existing knowledge base. The rise of self-service for routine support issues means that agents will increasingly deal with challenging questions, volatile circumstances, unpredictable issues, and highly emotional customers. Agents, therefore, will require access to a more dynamic set of knowledge — one that accounts for *real* customer data, as well as frequent changes in product offerings, company processes, and channel preferences.

VoC is the ticket to this higher standard of knowledge management. By analyzing customer interactions, companies can better assess where knowledge is going right and wrong. They can subsequently update and enhance knowledge entries, reclassify content based on actual customer phrases and needs, and optimize AI tools like agent assist to keep employees informed, productive, and engaged.

By uncovering gaps in the customer experience, VoC data *also* empowers agents to take on a bigger role in the knowledge management process. They can share “battle-tested” guidance for navigating inquiries and even rewrite knowledge content based on real-world use cases.

Indeed, VoC improves agent engagement (and performance) by making knowledge more useful *and* giving employees a vested interest in the process.

*“Once you have your knowledge base established, you guarantee your new hires (and current agents) are utilizing it via knowledge checks - like quizzes, training checklists, or even role-playing between team members to reinforce knowledge,” adds Lane.*

### Keys to success:

- When analyzing VoC data, account for signs of agent-effort — including repetitive questions and silent time. These issues are almost always attributable to a weakness in the knowledge management process.
- When asking agents for feedback, ensure they identify gaps between the questions customers are asking and the answers they are able to gather from internal knowledge content.
- Use modern knowledge tools, perhaps with a gamification element, to empower employees to create and update knowledge base records.

## FROM MEANINGFUL ENGAGEMENT COMES POWERFUL RESULTS

In addition to better *connecting* agents to each other and the overall business, VoC data *empowers* them to deliver more productive and customer-centric service. Employees will know exactly who they are serving, exactly how well they are doing, and exactly how they need to grow and improve. Whether via self-improvement, peer collaboration, or targeted coaching, they will be able to consistently learn new skills, acquire new knowledge, and close performance gaps.

As a result, VoC is a *direct pathway* to stronger contact center performance. Interactions will become more efficient, accurate, and personalized, leading to better quality scores, higher resolution rates, and markedly stronger satisfaction and loyalty levels.

By partnering with Stella Connect by Medallia, numerous brands have turned data into stronger agent performance and better business results.

**Company: TechStyle**

**Challenge:** Multi-Continent Contact Center Teams with Little Visibility Into Performance

**Solution & Result:** Managing Performance with Real-Time Visibility and Making QA More Meaningful

- Visibility for leaders in corporate and the contact center into team performance
- Actionable QA tied back to real customer feedback
- Ability to recognize areas of excellence and hone in on areas of improvement

**Company: Kijiji**

**Challenge:** Costly Quality Assurance Process with Limited Return on Investment

**Solution & Result:** Balancing Quality with Greater Efficiency to Yield Faster Progress

- Customer feedback and quality assurance linked together for a holistic view of agent-level and team performance
- Proactive coaching based on core competencies outlined by customers
- Macro and micro-level insights across entire front-line team

**Company: Brooklinen**

**Challenge:** Creating Impactful, Hands-on Customer Service Training Across the Country

**Solution & Result:** Investing in Customer Service Performance Management Through Transparency, Open Dialogue, and Empowerment with Stella Connect:

- Micro-coaching in the moment based on real customer feedback
- Putting rewards and recognition in the hands of happy customers
- Leaderboards to inspire engagement and health competition





## 3 REASONS WHY THE PHONE CHANNEL MUST BE IMPROVED IN THE CONTACT CENTER OF THE FUTURE

The contact center of the future will undoubtedly rely on the voice channel for complex and human-centered support. Even with the adoption of digital, 40% of companies currently believe that customers should have easy or instant access to a live agent for all issues. With this dedication to universal phone support, it is clear that organizations are working to enhance the phone channel and offer more comprehensive support systems.

However, beyond the actual presence of a functioning phone option, companies must also work to improve the technology behind the voice channel to ensure their employees are able to properly utilize it. The leading pain points in today's contact centers were inefficient and disconnected systems and high agent turnover — marking a seamless and intuitive phone channel as critical to the modern agent experience.

By optimizing the phone channel, companies can help improve retention and contribute to a more empowered front-line. With greater access to feedback, insights, and intent, agents can form meaningful relationships with customers and build confidence as they take on the evolving customer contact role. Here we outline three leading reasons why the phone channel must be improved to support modern contact center operations.

### #1 TRANSPARENCY AND TRUST

On the phone channel, customers are seeking a highly personal, engaging service experience. When asked why an individual may choose to call customer service, customers overwhelmingly stated that the increasing complexity and personal nature of an interaction would influence their decision to use the phone.

These factors demonstrate the ‘official’ nature of the channel; from the customer’s point of view, it’s the most direct and transparent method of communication. When using email or chat, the customer cannot easily verify their own identity, nor can they distinguish who they are actually speaking with. And, with the increasing presence of automated interactions, this dynamic becomes even less clear. Therefore, the phone channel is the last ‘direct’ form of communication a customer may have with a brand.

It’s this level of transparent communication that is becoming more and more important to modern customers. Even when a company makes a mistake, moments of truth and open communication are what ultimately help build stronger relationships. Over 50% of customers stated that cases where an experience goes wrong and a company handles the outcome exceptionally well, make them more willing to support a business.

Therefore, the transparency the phone currently offers must be preserved to ensure continued customer experience success. Through branded calls and direct communication, companies can modernize the phone channel and improve customer trust to build long-term customer relationships.

BK Smith, VP of Product Management at First Orion states that “As new technologies arrive in the market, it will become easier for legitimate brands to reach consumers through trust, transparency, and elevated brand awareness,” he furthers, “Transparency in communication really sets the tone before they answer.” By leveraging branded communication, companies can ensure their customers feel a sense of clarity before they even answer the phone.

Additionally, during difficult or frustrating moments, brands can take on a more proactive service approach and reach out to customers in a more meaningful way. Once companies implement branded calling and shift to a more proactive service mindset, they will improve answer rates, reinforce customer trust and heighten their larger brand reputation.

This is critical because reputation enhancement and management have become necessary in today’s digital age, and 44% of brands noted that creating a customer-centric reputation is a current priority for their value metrics. Therefore, maximizing transparency and opening communication will allow for a more reputable, and trustworthy brand experience.

BK Smith of First Orion furthered this by stating that “Illuminating who’s calling, and the reason for the call, will be expected so that customers can distinguish legitimate businesses from bad actors. It’s not a stretch that both businesses and consumers will begin to make choices of who they do business with based on reputation.”

## #2 INSPIRING EMPLOYEE ENGAGEMENT

Agent retention was marked as one of the leading concerns for companies moving forward. As we approach 2022, employees have set their sights on more flexible, empowering, and engaging opportunities. With the ‘great migration’ underway, employees are no longer sheltering in their current roles but seeking positions at companies that are actively prioritizing their well-being and workflow. Now, to not only attract new talent but retain their most competent agents, companies must implement technology that supports employees with their day-to-day functions.

Retention strategies are increasingly centered around development and growth opportunities, and 41% of companies noted that improving contact center tools and systems was a part of this training process. With consistent coaching and cutting-edge tools, employees can confidently take on more complex interactions and derive a deeper sense of fulfillment in their roles. Further, they can build customer trust as they participate in more frequent interactions and work to facilitate seamless and engaging discussions.

BK Smith of First Orion states, “In a world of ‘unknown’ callers wanting you to update your car warranty, that environment of distrust wears on employees. They too want as many positive interactions as possible with customers from the start without painfully explaining why they are calling for legitimate reasons.”

With branded calling employees benefit from instant customer recognition, reducing the amount of time required to explain their role and intentions. As customers are able to identify the caller, they will become less guarded and more willing to participate in meaningful conversations. This reduces the stress of unprompted interactions and empowers employees to lead with the true nature of the call.

Taking measures to improve the day-to-day workflow of employees makes agents feel supported and considered, which ultimately inspires greater levels of engagement and improves long-term retention rates. In such a competitive labor market, companies simply cannot get by offering their employees the bare minimum. They must equip their contact centers with the most relevant and intuitive technology to proactively support their agents. Investing in advanced tools demonstrates the employee's value to the company, and promotes continued loyalty and respect.

Branded communication also gives agents the opportunity to interact with customers on a more regular basis. Once customers recognize the caller, answer rates will continue to improve, creating an opportunity for consistent engagement, training, and refinement — with more interactions, comes greater expertise.

### #3 ROOM FOR TRANSFORMATION

While we often paint the past two years as a period of rapid-fire transformation and improvement, companies may not actually agree with this narrative. Almost a third of companies noted that their transformation efforts had actually been somewhat, or significantly, slower than they expected over the past year, and the majority overwhelmingly denied that COVID accelerated digital adoption.

These surprising statistics ultimately indicate the fact that the contact center still has room to grow in terms of innovation and technological advancement. While customers certainly became more comfortable with digital service experiences, their interactions with brands have not widely improved. Only 15% of customers actually stated that companies have gotten better at delivering digital customer service, and 14% noticed an improvement on the phone.

This means that transformation efforts, expedited or not, are still not complete. So, to actually improve experiences and provide meaningful changes, companies must now work to implement solutions that truly impact the customer and add value to interactions.

Additionally, transformation opportunities should not solely focus on the digital experience; in fact, nearly a third of companies stated that they believe AI will never become a preference for any conversation — it will always remain a secondary option to agent interactions.

Therefore, companies must prioritize innovation on the phone channel to effectively improve customer experiences. With companies, and customers, holding phone interactions to such a high standard, there must be a consistent improvement to ensure the long-term of the phone channel.

By utilizing branded communication, brands can deliver digitally enhanced communication on the traditional phone channel to modernize the experience, while maintaining the integrity and empathy of agent interaction. When pairing the innovative and unique branding element with a comprehensive and friendly phone interaction, companies can effectively transform the voice experience for the next generation of customers.

And, while improving the phone channel is important in itself, it's also critical to avoid any decline in customer perception. If companies do not focus on imminent improvement, they may suffer from decreased answer rates, blocked calls, or customer frustration. BK Smith of First Orion notes that "Ignoring current security, compliance mandates and consumer trending would be catastrophic for brands and a generally a non-starter. It means plummeting answer rates, possibly having your calls tagged incorrectly, or worse (blocked). Failing to meet consumer needs or to interact with them in ways that makes sense for them will only leave brands behind."

So, to modernize service experiences in the future, companies cannot overlook the importance of the phone channel. With customer expectations continually rising, brands must find new ways to consistently improve and adapt to customer needs — on all channels. Phone interactions are only growing in importance and they demand increased clarity and transparency to remain successful.



## EMBRACE THE NEW CONTACT CENTER, BUT DON'T FORGET ITS PURPOSE

### 3 Ways to Build the Customer-Centric Contact Center of the Future

Customers are interacting in new ways in new channels. Employees are handling more complex tasks in remote environments. Technology is redefining the balance between automation and human-led workflow. The contact center, quite simply, is undergoing significant change.

What is not changing, however, is the fundamental purpose of the contact center: to enable employees to deliver experiences that build customer loyalty -- at all times, in all channels.

*“The key to great customer loyalty is to create a strong environment and culture where associates thrive,” explains Sean Erickson, Global Head of TTEC Engage. “That strong culture and employee experience will permeate to customers.”*

As customers demand more from their omnichannel interactions, and as employees seek more empowering agent experiences, contact centers cannot lose sight of this purpose. They cannot let the myriad of change and challenge distract them from efforts to reduce operational friction, streamline customer journeys, and successfully personalize all customer interactions.

This briefing will reveal the mindsets, strategic best practices, and innovative technologies that ensure your *evolving contact center* continuously becomes a more *customer-centric one*.

## COMMIT TO REAL-TIME AGILITY

The contact center is notorious for its inertia. Trends emerge, channels arise, and customer demands change all the time, but the contact center rarely adapts in a timely manner (if at all).

In some cases, antiquated technology is to blame. In early 2020, CCW Digital research flagged restrictive legacy systems as one of the top challenges facing contact centers. By accelerating change, the COVID-19 pandemic only *exacerbated* the harm of dated, disconnected systems.

In other cases, the issue is one of data. Without clear insight into how the customer contact landscape is changing, not even the most technologically savvy company can swiftly redesign its experiences. Strategic mindset also plays a role in determining agility. If the entire company does not *rally* around the idea of customer centricity, transformation efforts will fall short.

Instead of allowing these challenges to linger, customer-centric contact centers will build a framework that supports real-time agility. Key action steps follow:

### Adopt real-time thinking

Cumbersome processes and traditionalist thinking are the enemy of success in today's landscape. Leading companies will instead embrace the idea of real-time change, empowering all stakeholders to quickly adapt to new systems, customer behaviors, and employee needs.

### Leverage cloud technology

Legacy, on-premises systems have no place in an era of distributed work and rapid change. Successful contact centers will leverage cloud solutions that allow them to not only scale operations based on volume need but instantly introduce new features and integrate new channels as the engagement landscape evolves.

*"Rather than stick to the old way of doing business, progressive firms are creating innovative, flexible customer experiences at scale and budget with speed," declares Erickson. "Cloud-based platforms enable quick deployment of automation, data integration, training, and other innovative technology to an in-center or remote workforce that can be rapidly ramped from anywhere. A CXaaS model built on a cloud-based platform can be easily adjusted with modules like messaging, automation, dynamic knowledge base, voice-of-the-customer analytics, workforce intelligence, and more. For employees, an integrated, collaborative virtual workspace reduces friction and removes barriers to stellar customer support."*

## Commit to omnichannel

Contact centers identify "disconnected channels" as their #2 operational pain point, and only 18% believe they are truly "omnichannel."

This channel fragmentation is the enemy of real-time agility. To successfully adapt to change, companies will not only require a 360-degree view of their customer journey but a single platform for empowering agents to support customers in both new and existing channels. When agents can provide support in all environments, the company can swiftly adapt to changes in volume or customer preference.

## Support flexible work models

Customer-centric organizations do not allow resource restrictions to hinder their experience. They instead take advantage of flexible work models, including work-from-home, gig opportunities, and strategic outsourcing, to tailor staff availability to customer demands.

Advances in AI technology support these models by not only accurately forecasting volume but helping part-time and outside agents get up-to-speed.



## Harness actionable intelligence

A company has to know *what* change to make before it can begin its transformation. Modern customer intelligence solutions aid this cause by drawing robust, predictive intelligence from *all* interactions. With an unprecedented view into who its customers are, why they are engaging, and what “pain points” they experience during their journeys, the contact center will know exactly how to transform.

*“Data without context is just useless trivia,” adds Erickson. “Companies should demand that their data be contextual as it relates to the end-to-end customer (and employee) experience, not just a snapshot of a single moment or within a single department. Data-driven insights and analytics are foundational to accelerating results, enhancing the customer experience, and providing associates with a roadmap to successful performance and rewards.”*

## SUPPORT AGENTS WITH AI TECHNOLOGY

In theory, the rise of intelligent self-service opens the door for human employees to handle higher-value work. Rather than answering repetitive questions and performing rote tasks, they can focus on high-stakes, complex, and personalized interactions with customers.

Successful contact centers do not, however, expect this reality to materialize on its own. They know that agents can only solve complex problems and make meaningful customer connections when *empowered* by technology. Key action steps follow:

### Demand more from self-service

The dichotomy hinges on the idea that self-service is actually effective, which, as yesterday’s IVR platform proves all too well, is far from a given. After all, although 86% of consumers are more comfortable than ever using self-service, 95% still see value in *calling* agents for at least some issues. A non-trivial 43% view forced self-service as a leading pain point.

To break from this trend, customer-centric companies tailor their self-service experiences to the modern customer. After ensuring they only deploy self-service where it *adds value* for the customer, they leverage conversational AI to make the interactions more natural and fluid. By also connecting bots to all key data sources and constantly redesigning conversation flows, they ensure self-service interactions always become more contextually relevant and resolute.

## Prepare for escalation

Self-service will not be a sufficient support option for all customers and all issues, but it can prove immensely useful even when customers need to escalate.

The best platforms capture actionable data related to customer intent, sentiment, preference, and conversational behavior. By passing this data directly to the agent upon escalation, the bot helps the agent deliver an experience that is more seamless *and* more personalized.

This data also has a big picture use case; with insight into how its customers are engaging on the front lines, companies can consistently recalibrate customer journeys and agent training.

## Augment knowledge in real-time

According to CCW Digital research, optimizing the knowledge base is the #1 way to empower agent performance. AI plays a significant role in this endeavor.

In addition to helping employees more easily search knowledge entries, leading AI solutions can even recommend next-best actions based on the context of the interaction. This helps the agent shift attention from “looking up information” to “using information to connect with customers.”

Knowledge management initiatives are *particularly* relevant in the era of remote work; with less ability to ask their deskmates and supervisors for help, employees are more reliant than ever on the tools and insights on their desktops.

## Elevate training

Remote and gig work models have appeal for both operational efficiency and the agent experience, but they also raise an important question: how can a company empower agents with little-to-no brand exposure to handle increasingly complex work? Just as importantly, how can the company get them up-to-speed quickly (to support the “on demand” nature of today’s customer experience landscape).

AI is the answer. In addition to leveraging AI to better democratize knowledge, leading companies use AI simulations to assess an agent’s real-world competency – from anywhere in the world. Companies can evaluate the performance, zero-in on personal coaching needs, and ultimately get agents ready for primetime.



## RETHINK AGENT ACQUISITION AND RETENTION

AI technology empowers the right agent to wow customers, but what does it take to find and keep the right agent?

Always important for contact center leaders, this discussion is particularly relevant now. Agent attrition ranks as the #3 pain point facing today's contact centers, and hiring is exceedingly challenging in today's market.

These macroeconomic challenges are, of course, emerging at a time when the standard for agent performance is higher than ever. Customer-centric companies are no longer looking for expendable agents to read scripts and fill seats; they need employees who can master complex processes and engage in empathetic, consultative conversations.

They have to adopt a new way of acquiring and retaining talent. Key action steps follow.

### Redefine the career path

Many trumpet the "self-service for simple issues, agents for complex ones" adage, but few define what the complex work entails. What will an agent *do* in an AI-driven contact center? Will the agent's role progress beyond the idea of customer support?

By redefining and properly explaining the relevant career paths, companies can attract elite talent that would have never previously worked in the "script-reading" contact center. They can also retain employees who are seeking more long-term purpose and opportunity.

### Adopt flexible work

Not simply a scalability play, flexible work is an employee experience opportunity. Forty-nine percent of companies, in fact, identify flexibility as a crucial agent retention strategy.

Successful companies will build a workflow model in the common ground between their *operational needs* and their *employee demands*. Not simply about offering remote and hybrid opportunities, this endeavor may involve allowing agents to rotate between functions or topic areas to create more day-to-day excitement and unpredictability.

### Improve performance transparency

Contact center leaders may *want* to believe that agents derive independent joy and motivation from speaking to customers, but savvy ones know better. They understand the importance of quantifiable metrics. From introducing real-time scoreboards to leveraging gamification opportunities, they create motivation and team buy-in through transparent performance management.

Not simply about friendly competition, this performance management approach uncovers valuable insights that help agents *understand their purpose* and self-diagnose coaching needs.

### Commit to virtual engagement

With only 12% planning a complete return to the office, the majority of contact centers will maintain at least some degree of remote work. Leading ones will not allow this reality to jeopardize agent engagement.

*"One overlooked area is the strain that working from home might have on contact center associates," notes Erickson. "While remote work has its benefits, companies must make a concerted effort to encourage employee engagement with a proactive commitment to building a collaborative, digitally enabled employee culture."*

This effort includes leveraging video collaboration tools to achieve a mix of fun and productive virtual engagement. More about communicating with team members than monitoring their performance, this collaboration lets agents know they are part of an organization that values and supports them.

*"Remote and hybrid associates need to feel supported by the business and part of the culture to help them create amazing customer experiences," asserts Erickson. "A connected, collaborative environment is critical. TTEC helps solve this challenge with Humanify® Neighborhood, an immersive, fully virtualized engagement and collaboration workspace. It integrates all employee systems in one place, while also creating a gamified environment to interact and collaborate with colleagues around the world. Right from day one, Humanify Neighborhood acts as a guide through life at TTEC and aims to create a culture of one team and one community. It enables employees to have a sense of place, personalized presence and local connection at a global scale."*

## FINAL THOUGHTS | DO NOT LOSE SIGHT OF OUTCOMES

Collectively, the aforementioned steps and initiatives are a strategy for achieving the contact center’s true purpose: empowering agents to connect with customers. It would be ultimately ironic, therefore, if pursuing the steps caused companies to lose sight of important outcomes.

Many do succumb to this trap. They fixate on superficial wins – deflecting calls with a new chatbot, implementing a trendy CRM system, deploying a powerful speech analytics tool, adopting a gamification platform – without assessing their impact on what really matters: employee and customer experiences.

Without judging their success based on “outcome metrics” like first contact resolution and customer loyalty, they ultimately fail to spot emerging challenges *and* developing opportunities. They cannot be the agile, customer-centric, employee-minded organization they so strive to be.

Some organizations are, however, focusing on big picture results. By partnering with TTEC to bring customer centricity to fruition, they are also *enjoying* those favorable outcomes.

COMPANY	CHALLENGE	SOLUTION & RESULT
Major telecommunications firm	When it merged three separate lines of business into one and launched several new products, it quickly became apparent that a new training curriculum was needed to support the many different customer interactions.	TTEC provided an AI-powered, demand-based curriculum that kept new hires engaged and quickly honed their skills. New hire attrition decreased by more than half from 45% to 19%; first call resolution improved 5%.
Retailer	When the pandemic set in and the retailer moved more operations online, it needed a partner with the knowledge, expertise, and resources to quickly connect numerous disparate channels, databases, and applications in a unified system to deliver excellent employee and customer experiences across every touchpoint.	TTEC implemented a centralized associate desktop that integrated the client’s service channels and external applications such as the webstore order management, subscription management, loyalty, and complaint management systems into a unified interface.  TTEC also installed its Associate Assist Bot, a robotic desktop automation (RDA) tool that automates repetitive tasks for associates such as form filling to reduce errors and help associates focus on their conversation with the customer.  As a result, the same number of associates handled a 300% interaction volume increase from the previous year.



## HOW TO REDUCE AGENT EFFORT & CREATE A MORE FLEXIBLE CX

The rise of remote work, digital engagement, and automation technology open the door to more flexible employee and customer experiences, but they do not guarantee them. They do not automatically yield journeys with lesser friction and greater personality.

The pathway to flexibility ultimately comes down to how companies take advantage of the new normal. If they do not leverage modern innovation and robust processes to capitalize on new contact channels, innovations, and work environments, they will not see the results. In fact, they may create additional friction and friction for all parties.

This report will reveal how to ensure the new contact center landscape becomes a pathway, not a roadblock, on the journey to a stronger agent experience and a more flexible overall CX.

## SUPPORTING THE REALITY OF REMOTE WORK

For all its potential advantages, remote work lacks one core benefit of the physical contact center: consistent connection quality.

By granting all employees access to the same Internet speeds, telephony equipment, and work atmospheres, physical contact centers ensure that technical quality is never a variable. The environment may not be the perfect place to work, but it at least minimizes discrepancies in different agents' ability to properly understand and successfully support customers.

The remote work model offers no such assurance. Agents will inevitably be working out of vastly different environments, which all but guarantees there *will* be discrepancies in connection and equipment quality. Unsurprisingly, 66% of companies call poor Internet and phone connections a major challenge of the at-home environment.

Over the past two years, some companies have attempted to mitigate the challenge by supplying equipment to employees. The effort helps to reduce quality inconsistencies, but it is far from a complete solution:

- Supplying equipment does not account for variance in Internet speed, which arguably has a bigger impact on quality in the era of omnichannel engagement.
- Mandating equipment inhibits scalability, as companies will be unable to rapidly hire part-time “gig workers” without going through bureaucratic steps to purchase, provide, and test the equipment. Certain devices may also come with a learning curve, creating an additional training need when companies are aiming to reduce ramp time.
- Mandated equipment may be unappealing to today’s workers, who either work multiple part-time jobs (and do not want to constantly switch the devices they are using) or plan to work while traveling (and do not want to be responsible for company-owned devices).
- It can be costly, thus reducing the company’s ability to invest in areas like employee compensation and automation technology.

Due to innovations in cloud contact center technology, companies do not have to settle for this suboptimal solution. Instead, they can leverage functionality that allows employees to support customers and work inside of key systems with little more than a mobile phone.

*“Cloud technology, including modern contact centers hosted from multi-tenant environments, provides many options for customer representatives to access resources and engage with customers,” explains Tony Pereira, SVP Enterprise Solutions Strategy and Partnerships, Mavenir. “One advantageous method is offline mode. When a business continuity plan includes the contact center, providing administrators with the almost instant capability to re-route all calls to external numbers proves invaluable. Once configured, PSTN or even mobile numbers connect all calls without the need for on-site company resources.”*

*Another option could be the desk-less login. Customer representatives fielding calls that require no data entry, for example to answer frequently asked questions, do not even need an internet connection. The representative could call a unique number that logs them into the contact center. They can answer calls from their home phone or mobile device, and the business retains all call logs and recordings.*

*Lastly, if the representative still needs to access and update customer information, but their internet bandwidth is not enough to also carry a VoIP call, they could log in with their PSTN or mobile number. Voice interactions are then routed over traditional telecommunications infrastructure while reserving internet bandwidth for data entry.”*

## REDUCING CHANNEL FRICTION

Offering more contact channels is an appealing endeavor in theory, but it can quickly become a burden for both employees and customers.

If the different channel experiences are not unified, employees will neither be able to recognize customers who move between touch points *nor* efficiently manage communication in different environments. This friction will trickle down to customers in the form of a burdensome, impersonal journey filled with long wait times, inaccurate information, and repetitive questions. Frustration will rise, and satisfaction will fall.

*“Even if a business can solve the challenge of managing multiple channels, there is an additional obstacle to overcome – how to connect them,” explains Pereira. “Regardless of medium, from the customer’s perspective, they are interacting with a single business. Customers expect personalized service interactions; they expect the company to know them and their interaction history.”*

By helping companies unify their channels and simplify the agent work experience, omnichannel contact center platforms instantly reduce this friction. Agents will gain a 360-degree view of the experience, and customers will have the ability to seamlessly move between environments based on need or preference. The result will be a more satisfying customer journey and a more productive customer contact operation.

*“A customer service representative can handle all these interactions in a single pane of glass with an omnichannel contact center,” says Pereira. “This 360-degree view is essential because it can provide context from historical conversations or orders. Regardless of the channel used each time (SMS, RCS, Apple Business Chat, voice call, email, etc.), this view permits proactive response and, most likely, first call resolution.”*

In addition to eliminating friction, the unified omnichannel experience adds positive value to the experience. Companies will be able to not only capture robust customer data from all touch points but democratize the intelligence across the organization. Contact center stakeholders can use this data to improve customer profiles, redesign customer journeys, and deliver more timely, personalized support. The insights can also benefit other parts of the business, such as marketing and product development.

*“Our increasingly data-driven world is driving digital enablement that can provide insight and boost performance for the business and individual agents,” offers Pereira. “Statistics and dashboards can provide real-time feedback to agents for gamification, group or skill productivity, and dynamic shifting of resources when required.”*

An omnichannel framework also opens the door to intelligent routing; with all channels connected, the company can leverage contextual data to easily steer customers to the most suitable agent or self-service platform.

Another way to remove friction is to focus on creating experiences native to the devices and platforms agents and customers are already using. Why ask users to download and use a new mobile application or initiate a web chat tool when they can connect in the SMS or WhatsApp interfaces they use in their everyday lives?

*“Businesses build and deploy custom-built applications which must be downloaded, and require accounts to be created and verified,” laments Pereira. “Only then can the customer get to their actual request. If messaging were already native on the mobile device, then there would be no app fatigue. Customers could engage over globally available mobile ecosystems like Google RCS, Apple Business Chat, and Whatsapp for business, empowering them with secure and intuitive enriched messaging.”*

## USING AUTOMATION INTELLIGENTLY, AND EXTENSIVELY

Upon unifying its contact center platform in the cloud, a company opens the door to the power of AI-driven automation. When leveraged correctly, automation can further reduce effort and further create value.

An omnichannel engagement framework, notably, opens the door to the intelligent use of bots. Whether deployed in chat, messaging, or voice environments, these bots will have seamless access to all relevant data and knowledge — and all other channels. Consequently, they can deliver more effective self-service for customers, while also leveraging human-in-the-loop (HITL) capabilities to ensure seamless interplay and hand-offs between bots and agents.

*“While chatbots can not solve every issue, innovations like HITL could transfer a customer to a live person to continue the conversation with full context,” offers Pereira. “The beauty of such solutions is there is no application development, there is no gear to purchase because the technology is cloud-based, and can offer an easily deployable self-service list of chatbots to augment support personnel.”*

Other key AI-driven automation opportunities include data analysis and knowledge optimization. With access to data from 100% of interactions, AI can identify trends, pain points, and opportunities that could not be easily surfaced by traditional human business analysts. Modern AI solutions can also pair customer intent data with existing knowledge records to provide agents with next-best action assistance during interactions.

Knowledge optimization is becoming particularly relevant in the era of remote work. Agents working autonomously no longer have easy, face-to-face access to supervisors and peers who can guide them through challenging calls. An intuitive, proactive knowledge tool becomes their only method of quickly and accurately addressing complex inquiries.

Recall, a burgeoning AI use case, will provide further assurance of quality in the remote world.

*“As AI matures in many facets of customer engagement, it can help agents filter inaccuracies and recall communication errors that could damage a brand image,” forecasts Pereira.*

## TURNING FLEXIBILITY INTO EXCELLENCE

Collectively, the aforementioned steps provide an easier pathway to higher agent productivity and stronger customer connections. Better, more engaged talent will be able to improve performance even while handling more demanding customers and higher-complexity issues.

Customers, meanwhile, will be able to receive the information or support they want without having to make a trade-off between channel preference, wait time, or personalization.

The tangible benefits of this framework are numerous, with leading organizations witnessing improvements in traditional contact center metrics, reductions in operating cost, and higher levels of customer and employee engagement.

Some of the most notable success stories have been achieved in partnership with Mavenir.

### Company: Hospitality- Pizza Chain

**Challenge:** A large, North American-based pizza chain handling a substantial volume of calls that fluctuate depending on the day and time (peaking within a 4-hour window in the evening and on the weekends) improves availability and responsiveness with Mavenir's MAVbiz Care. The objective was to increase system stability, improve response time for orders, enable self-configuration for each location, and enhance worker flexibility.

**Solution & Result:** MAVbiz Care also features a rich, open API engine that allowed the team to create a customized screen pop for order takers. This allowed them to view orders across multiple restaurant locations. To enhance productivity, the screen pop featured one-click dispositions and pause reasons.

The new solution improved availability and responsiveness:

- almost doubling the number of daily calls per store—from around 30 to an average of 58
- call answer rate increased to 99%
- order taker productivity increased to 90%
- wrap-up time dropped from 30 to 10 seconds

### Company: E-Commerce - online grocer based in Asia

**Challenge:** A large, Asia-based online grocer wanted to ensure the optimum customer experience as the company rapidly scaled. The organization needed a solution to harness and use customer data effectively and ensure efficient workforce utilization.

The business initially used a PBX solution for customer care, but the system's inflexibility resulted in unsatisfactory customer experiences and delays in problem resolution.

They also recognized that customer behavior was changing. Customers were interested in engaging online through webchat and social media, so the grocer wanted to integrate those channels with the customer engagement solution.

**Solution & Result:** By replacing the PBX solution with a purpose-built customer engagement platform, the grocer was able to provide an enhanced customer service experience and allow the grocer to future-proof their customer service.

MAVbiz Care provided advanced, omnichannel interactions that were not possible with the previous PBX system. The grocer connected its Facebook and Twitter accounts to the contact center, allowing service representatives to monitor and respond to online reviews and feedback. In addition, the team enabled Click-to-Call and Web Chat on its website and apps. MAVbiz Care's Interactive Assistant functionality allowed customers to escalate chat to voice quickly and enabled a simultaneous chat channel for VoIP calls for more collaborative interactions. After implementing the MAVbiz Care platform, the support team grew from 8 to 350 and currently handles 30,000 calls per day.

- Average Answer time reduced from 40s to 10s
- Reduced Average Handle Time from 4.5min to 2.5
- Increased utilization from 40% to 70%



**Company: Telecommunications - Allegiant Technology**

**Challenge:** Allegiant recently invested in HubSpot for marketing enablement.

HubSpot provides customer data management, marketing automation, website SEO, and campaign tracking. Allegiant determined that they wanted to use HubSpot as a sales platform as well. The sales team tried to use it to contact customers and leads, and they desired each interaction to be automatically logged and tracked.

Although the sales and marketing teams used HubSpot for outbound calling, the service team used a different CRM system for inbound customer support requests. Neither tool provided an all-in-one solution that both teams needed, but Allegiant needed a way to track all the interactions in a single place. Therefore, any customer engagement system needed to connect to both CRMs.

**Solution & Result:** The first step was to create a click-to-dial function between HubSpot and the MAVbiz Care platform. For Allegiant, click-to-dial meant eliminating the need for another communications application, reducing cost and complexity. For the sales team, the click-to-dial integration stopped friction from contacting a customer. It automatically logged each interaction, tracking the entire customer journey. By connecting HubSpot with MAVbiz Care, Allegiant was able to take advantage of MAVbiz Care's call monitoring. Sales supervisors could listen to live calls and provide coaching when necessary, and call recordings were readily available for training purposes.

- Deep integration of call recordings inbound or outbound from the CRM provided easy access to previous customer engagements
- Click-to-call directly within the CRM contact screen saved 30 seconds per outbound sales interaction
- Reduced ring time to answer negated the need for staff augmentation



DailyStream

## REIMAGINING AGENT COACHING IN A REMOTE ENVIRONMENT

In the modern workplace, few topics are discussed more amongst business leaders than the employee experience. In the contact center, specifically, the employee experience consists of a number of correlated factors, each influencing one another. Important factors include company culture, individual or team morale, employee engagement levels, technology aimed at enhancing employee productivity, and arguably most importantly, the training and coaching they are given. When agents have the right coaching, they are best equipped to produce enhanced customer interactions that drive customer loyalty and retention.

*At the end of every support interaction, they [customers] want to be happy, they want to feel like they got the answer, or they got their issue resolved. And that hasn't changed. It's the way it was decades or centuries ago, even, and it will be that way 100 years or more from now as well. Customers have always wanted this but what has changed is the way we go about it. - Shep Hyken, NYT and WSJ bestselling author, Customer Experience and Customer Service Expert, CCW Advisory Board Member*

Whether they are looking to catch up or get ahead of the competition, 87% of customer experience and contact center leaders are looking to enhance the customer experience by investing in technologies that improve agent training, and ultimately, their ability to provide profitable support interactions. However, a staggering 46% of customer experience and contact center leaders admit that they currently struggle to train, coach, and develop agent talent in a remote environment.

To improve agent coaching, important considerations include the impact remote and hybrid work has on agent training and where most go wrong, which new technologies and channels can alleviate these problems, and how an innovative approach to the remote contact center can determine customer experience success and business revenue.

## THE FUTURE WORKSPACE OF THE CONTACT CENTER

*The advantages of a remote workforce are many: eliminating the daily commute, allowing workers to better manage home/child/pet issues, being able to hire agents anywhere instead of just locally, saving money on building expenses, and more. The result will be better, happier employees who turn over less often. - Dan Gingiss, Bestselling Author, Forbes Contributor, former Social Media and CX Leader at Discover, McDonald's, and Humana.*

89% of CX and contact center leaders say that remote or hybrid will be a permanent option for at least some employees. Only 7% of CX and contact center leaders say that most or all employees will work in the traditional, physical setting with no remote or hybrid option. 83% of employers say that remote work was an overwhelming success. For many, this may be fair to say considering the continued ramifications of the pandemic. However, despite the employee and employer preferences and interpretations on the success of remote work thus far, their customers think otherwise. Those are the only votes that matter.

While the case for remote or hybrid work is undeniable, customers are reporting friction in their experiences as a result of poorly trained and unequipped agents in a remote workspace.

59% of consumers state that customer service has either not improved or gotten worse. This may be unsettling considering 60% are saying it's a more important factor in their purchasing decisions. Additionally, the vast majority of today's consumers will switch to a competitor after just one or two low quality customer service interactions, such as repeating information, waiting on hold, lack of personalization or contextual customer data, disengaged agents, or no available representatives. These problems have increased dramatically in a remote setting, where there is little visibility into the agent's workday and accountability and productivity can be easily compromised with little to no explanation.

## HOW REMOTE WORK IMPACTS EMPLOYEE

Recognize the fact that things have changed dramatically. When it comes to the whole work-from-home culture, it might be the front-line, the team leads, the managers, the directors, it might be everyone working from home depending upon how you arrange this. Role model the behaviors you want your managers, directors, and team leaders to show. Build connections with them, show the support for them, but also ask them to go and focus on employee engagement. - Mike Aoki, Trainer/Speaker on Sales, CX & Customer Retention/ Top 25/ GTACC Award winner/ Bestselling Author

Prioritizing agent training, coaching, and accountability as the backbone of an engaged workforce and contact center operation should never be compromised as a result of remote working environments. Now that the vast majority are remote and will remain remote to a degree, agents need to not only be held more accountable, but also given the coaching and insights they need to be successful.

70% of contact center and CX leaders believe collecting and/or acting on employee insights is becoming a more important objective as they look to build the contact center of 2025. But what if insights and analysis for agent coaching purposes could be captured through a new approach? What if contact centers could enhance the visibility and communication to an even higher degree in a remote or hybrid environment?

## LEVERAGING STREAMING FOR AGENT COACHING AND VISIBILITY

Through innovative approaches and technologies, such as screen and audio monitoring, managers and executives can better assess quality and improve engagement, gain insight into which agents need attention, who deserves a raise, or in some cases, who should be let go. As the video channel continues to become a more important tool in the contact center, advancements in streaming and monitoring also gives coaches and decision makers the ability to see a holistic view of the contact center's day-to-day operations through a Netflix-like user experience. They can literally and contextually see things such as how their new processes are really working, how new hires are performing, and gain insights that drive more actionable decisions.

Of course, the objective of these emerging technologies in the remote workforce is not to spy on agents and employees or catch them in the act, but to ensure visibility, operational efficiency, and most importantly, training and coaching. For example, agents and team members can share skills and best practices with the rest of the team, or with their managers, simultaneously allowing them to get noticed and appreciated. In real time or recorded, agents' work can be analyzed, processed, and broken down, helping employees identify areas of improvement. Team leads can add comments to team members' work days, such as commenting on a snippet of a customer interaction. Leads can also quickly create coaching clips by narrating real-world calls.

*For team leaders it's a definitive performance and productivity tool and a fast and effective coaching tool. For team members it's an affordable empowerment tool that agents use to either get recognized or request coaching. - Ryan Pletan, VP Daily Stream*

The video channel has quickly become an integral part of the employee experience and can be used in a number of ways, from supporting or disclaiming agent performance metrics through visibility, to better coaching and managing employees. With new advancements, asynchronous coaching with real-world scenarios can revolutionize the way contact center agents work.

*A lot of productivity and performance problems get solved on their own because with an every day/all day video recording team members know they can be easily and definitively be held accountable. Daily Stream can also come as a google chrome extension so you can filter by inactive or active status. Lengthy inactive status combined with video definitely demonstrates a lack of productivity. No more 'where are they?' or 'what are they doing?' - Ryan Pletan, VP, Daily Stream*

Contact centers will continue to prioritize more supervision aimed at coaching and productivity within a remote workforce. As a result, investment in CX innovation and digital transformation will continue to increase at an exponential rate. The result will be better agent and customer experiences, creating a more competitive landscape. Brands who empower themselves with actionable trends to aid their technology investments, and strategic approaches will be the ones who benefit most in the year ahead.

## CASE STUDY

Daily Stream provides the real time and recorded video of daily operations that I need to optimize coaching, accountability and engagement. It doesn't just make WFH work, it makes WFH work better than in-office. - Cheri Philips, Operations Manager, Smart Sales and Lease

*Smart Sales and Lease provides financial services to enterprises like Ashley Home Store franchisees and Berkshire Hathaway's Nebraska Furniture Mart. In the last year, Daily Stream has transformed their remote contact center by having real-time or recorded HD video monitoring with collaborative clipping. By exposing actionable insights Smart Sales and Lease has avoided many of the pandemic pitfalls such as lower customer satisfaction, reduced performance, and unverifiable performance metrics.*

*Daily stream helps contact centers with engagement in 3 ways:*

- *Collaborative Clipping: Team members have never had a more empowering tool. They can share clips of their best work(recognition), coaching requests, sharing and participate in continuous improvement.*
- *On and off call monitoring. Engagement and job satisfaction demand accountability from all team members. Disparate levels of productivity hurt morale and engagement*
- *More efficient and effective Coaching. With Daily Stream team leads can quickly share real world videos of great performance or narrate situations that didn't go well.*

**It's like game-film for champion contact centers. It's like having your teams and operations on Netflix and every agent is the star of their own channel - Ryan Pletan, VP Daily Stream.**

### Interested in learning more?

Schedule a 30 minute [consultation](#) and see how Daily Stream can verify your contact center performance and process with real-time or recorded all-day screen and audio streams.





## DEMOCRATIZING YOUR CUSTOMER DATA: UNLOCK BUSINESS VALUE FROM CONTACT CENTER TO C-SUITE

The future of the contact center is about more than just improving KPIs like agent performance or average handle time – it's rooted in the ability of executives to use insights from customer conversations to drive enterprise-wide business performance improvement

While many organizations like to claim that they're data driven, many teams still operate on instinct. **According to Gartner**, most companies base more than half of their decisions on gut feel.

What's preventing teams from making data-driven business decisions when they're awash in data? Incredibly, **2.5 quintillion bytes of data** is being created worldwide every day. And 90% of the data that's ever been created has been created in just the last two years. That's 2.5 quintillion bytes of new information that could be used to close the next enterprise deal or create a best-selling product.

While a wealth of artificial intelligence (AI) and machine learning (ML) tools are available to collect and analyze data, the barrier to entry is often too steep for the average business leader who wants to apply data to practical use cases. What's more, many organizations collect data from their customer conversations that gets stuck in the contact center. While applications, like improving agent performance, are important, that data isn't being leveraged to its full potential to drive enterprise-wide business performance improvement.



Customer conversations, when understood at scale and across channels, have the potential to drive business-wide performance improvements that impact your bottom line. It takes unlocking these insights and making them accessible for anyone across the enterprise to interpret and use on the job, regardless of their department or position.

Conversation analytics is one potential answer. These powerful platforms capture and analyze customer conversations happening across your business and bringing to light the intelligence that exists in those interactions. These insights can be used across departments to make better decisions, such as what product updates should be brought to market faster or how to change marketing campaigns based on what your customers are telling you.

It's time that these business-impacting insights are made available to more people across your organization. It's time to 'democratize' your data, so that more leaders can drive concrete, measurable business changes successfully within your organization.

## DEMOCRATIZATION & BEYOND: UNLOCKING BUSINESS IMPROVEMENTS FROM CUSTOMER DATA

For the past five years or so, there has been much discussion around the concept of data democratization. Simply defined, data democratization means making data accessible to the average business user, despite their level of expertise. Many organizations strive toward this goal and are investing in the right technology. For example, **research from Forrester** shows that 85% of IT decision makers are prioritizing the use of AI and ML to modernize their customer experience (CX) in the next 12 months. However, providing access to a customer data and analytics platform is just step one.

From there, it's critical to help your business users *understand what they can do* with the data that's available to them. You can use AI to uncover the opinions, behavior and emotion of customers at every touchpoint in their buying journey. Armed with that data, your business users can take targeted steps to drive business performance improvements at across department operations.

Let's break it down with an example. Analyzing every customer interaction (and these interactions in aggregate) can result in first, second, third-order effects that drive measurable business results.

- **First-order:** Using a conversation analytics platform, your customer service agents can immediately identify areas to improve their performance based on what they're saying during customer interactions. These platforms can provide real-time feedback on what to say when a customer is frustrated or mentions a competitor. This level of feedback can dramatically improve call outcomes and reduce customer churn.
- **Second-order:** Your supervisors can use these analytical insights in aggregate to compare notes and find best practices for how to coach and train their customer support teams. This additional coaching can lead to increased job satisfaction and retention for agents on the front lines.
- **Third-order:** Your product team can analyze insights from customer calls over a certain time period. They may find that customers are continuously asking for a certain feature that isn't available yet, or request changes to one that already exists. They can use this data to inform and prioritize their product pipeline. Listening to the voice of the customer (VoC) to drive product improvements generates bottom-line revenue.

This level of data-driven business change doesn't happen overnight. It comes with a certain cultural shift that may seem painful for organizations that are used to operating on instinct rather than data. Another common problem is the perception that data is only available for those who can create the models themselves. Overcoming these cultural barriers isn't always easy.

With the right level of executive support, teams can learn to trust the output of conversation analytics platforms, and put processes into place that verify and measure that trust with real business KPIs.

## HOW CONVERSATION ANALYTICS IMPACTS BUSINESS KPIS

Conversations via phone, text, chat, email, web, and social media are full of unstructured data and unsolicited feedback that can offer insight into the mindset of a customer. Unsolicited feedback, such as acoustic measurements,

emotion, context and more, are important details that are only uncovered by deeply understanding customer interactions, and offer stronger insights than post-interaction surveys alone. Conversation analytics can convert that information into structured data you can search, analyze, categorize, and score to develop actionable intelligence and measure business performance.

For example, in a mid-sized outerwear company with 300 people in its contact center, the average agent may talk to customers approximately 40 times a day. That adds up to a staggering 12,000 calls per day. Trying to manually gain insights from these types of data is overwhelming, if not impossible.

Let's imagine there were 85 calls on Monday in which customers complained about a shortage of green down vests in the northeast. Imagine being able to structure this data and aggregate these insights so the product, marketing and sales teams can operationalize them. In this case, that would mean getting the additional inventory to the right location in a timely manner, and maybe even providing customers with a discount for their inconvenience to encourage loyalty.

Even though the data originates from customer conversations, the insights from customer interactions can transcend the customer service team or contact center.

- In **marketing**, understanding how people respond and react to your promotions provides a wealth of knowledge for optimizing campaigns to increase conversions.
- In **product development**, the insight and feedback gleaned from customer conversations can reveal how products can be improved to satisfy needs and wants.
- **Sales teams** can better understand what techniques resonate most with customers and prospects, and apply those best practices across teams.
- **Finance professionals** can better understand customer pain points to make understanding and paying bills as easy as possible, improving cash flow and reducing the cost of collections.
- **Risk and compliance** teams can benefit from constantly monitoring how agents are communicating with customers to improve training and ensure regulatory compliance.

The future of the contact center is one where the insight uncovered in customer conversations are used to transform the entire business, from contact center to C-suite. And to truly empower your business leaders and the end users of data from the top down and bottom up, it's crucial to adopt solutions that can help teams generate actionable insights that convert to measurable business outcomes.



## THE STATE OF DIGITAL CUSTOMER EXPERIENCE IN 2021

### The Impact of the COVID-19 Pandemic on Consumer Behavior and Self-Service

#### INTRODUCTION

Even before 2020, many companies had begun investing in new digital services to increase the scope of their online business. This might have meant adding new channels for customer outreach, such as chat and text, automated appointment scheduling, or AI-powered chatbots as a means to answer customer FAQs.

However, having the right tools and using the right tools correctly are two different things.

A customer might be delighted to see that a business has a chatbot to answer questions after working hours. But, if that chatbot can only tell the customer when a representative will be back online to assist, has it really helped the customer? Many Interactive Voice Response (IVR) systems ask consumers to download and use an app. How many customers do you expect to hang up, download an app, authenticate, navigate to the right solution page, and complete their action?

Small friction points in CX implementation directly result in sales or enrollment conversion drop-offs that not only cost the typical brand millions of dollars each year but also drive your customers back to costly agent-assisted support or in some sectors, to another competitor. By fixing the last mile of CX with digital self-service, you drive customer action while lowering costs by 30-40%.

Based upon a broad survey of consumers in May-July 2021, this report captures attitudes toward digital self-service across a range of consumer sectors. Our goal is to help decision-makers better understand how consumers perceive digital services and what they value.

Let's take a look at the data and dive in.

## TREND 1: COVID-19 ACCELERATED DIGITAL ADOPTION.

2020 moved nearly every business online in one form or another. Consumers expanded their domain of digital services, moving from using a few tried and true digital service categories to adopting entirely new ones.

Prior to the pandemic, consumers predominantly used digital services in the following sectors: 1) Banking and Insurance (36.5%) 2) Cell Phone and Cable (30.2%) and 3) Retail and Grocery (24.6%).

After the pandemic, that landscape expanded. Our survey shows that after 2020, 27.2% of customers increased their use of digital services in Retail and Grocery while 20.4% of customers expanded their use of Media and Entertainment digital services.

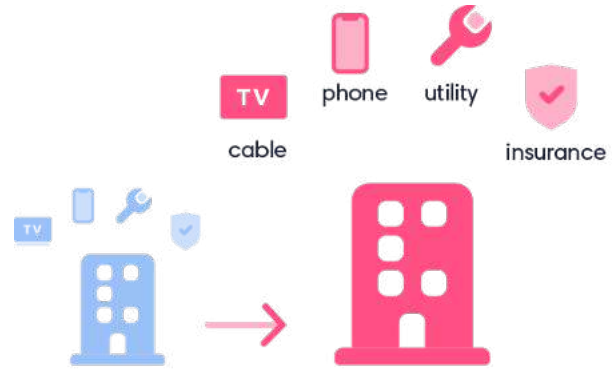
Respondents indicated that change in behavior is likely to stick in the retail and grocery space. 23.2% of customers expect to use more digital options for Retail and Grocery in the coming year than before COVID-19.

**Key Takeaway:** While some consumers may go back to more face-to-face service after COVID-19 restrictions are lifted, overall consumer behaviors have shifted more permanently toward digital.

## TREND 2: CONSUMERS ARE JUMPING SHIP TO PROVIDERS WITH BETTER DIGITAL CX. SOME INDUSTRIES ARE AT HIGH RISK.

There's a cruel irony to phone service providers not being great at servicing customers over the phone. This trend has not gone unnoticed by customers. Over 40% of consumers said they would be "likely" or "very likely" to switch cell phone, cable, utility, or insurance companies for a comparable provider with better digital service offerings.

**Key Takeaway:** To attract and retain customers, companies have to invest in digital CX. New competitors are disrupting the telecom, utility, or insurance space by setting themselves apart with modern service infrastructure and a CX-forward strategy.



# 40%

of consumers are "likely" or "very likely" to switch cell phone, cable, utility, or insurance companies for better digital CX

## TREND 3: CUSTOMERS WON'T WAIT ON HOLD.

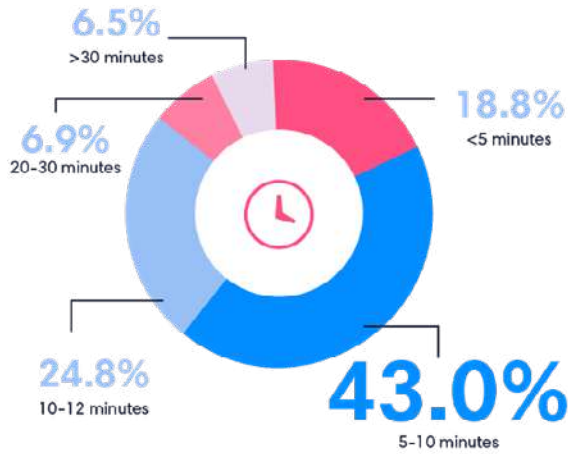
Our survey found that the average consumer waits 5-10 minutes on hold for customer support. While this figure may seem acceptable to businesses, customers think otherwise.

MIT researcher Richard Larson says, "often the psychology of queuing is more important than the statistics of the wait itself." That means companies will bleed customers if they perceive the wait as unexpected, taking too long, or unaligned to value. That's why one in three consumers (32%) say they will walk away from a brand they love after just one bad experience (PwC).

By using smarter CX strategies that diversify your avenues for customer support, you can reduce wait time while boosting CSAT.

**Key Takeaway:** To start, give customers additional ways to find what they're looking for without requiring them to rely solely on your contact center to offer customer support. By using tools like self-service web flows, email, and automated appointment scheduling, you give your customers the flexibility to choose how they'd like to be served while also reducing the time they spend waiting for that service.

**How long do you wait to speak with a live agent?**



**TREND 4: YOUR CUSTOMERS ARE ALREADY OMNICHANNEL READY.**

The customer journey spans across channels. To better understand and deliver on your customers’ needs, you need to be able to see how their interactions across channels tie together.

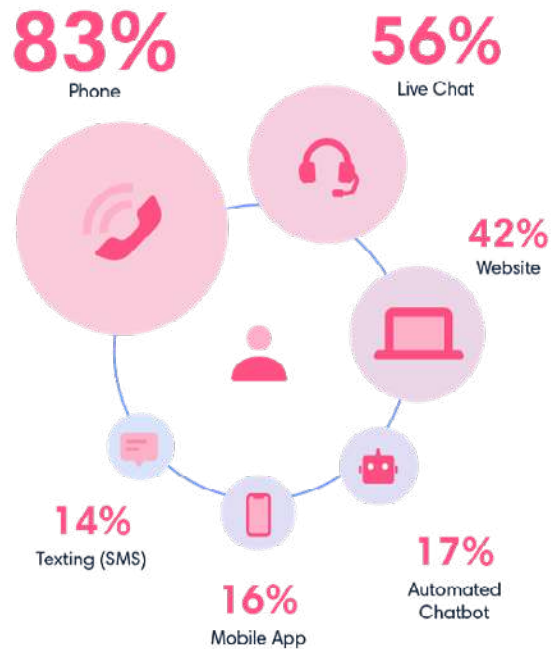
According to our survey, 40% of consumers have used three or more conversation channels to engage customer service. Here are the top channels:

- Phone
- Live Chat
- Website Inquiry

Adding support for these channels is a great start. However, it doesn’t address a common pain point customers face — silos. The most common customer complaint in regards to contacting service was that their conversations across various channels were not connected. Customers became frustrated with having to repeatedly re-identify themselves on each channel of engagement.

Businesses need to rise to meet customers’ expectations of having a consistent experience across channels.

**Key Takeaway:** CX leaders are adopting digital CX platforms that unite all their communication channels from live chat to email to SMS to IVR, so they can get a 360-degree view of their customers’ needs. The difference with Airkit is you can orchestrate digital experiences that preserve session state and flow uninterrupted across channels without losing context – down to the keystroke.



**Which communication channels do you use to interact with customer service?**

**TREND 5: LACKLUSTER DIGITAL SERVICE CAN DO MORE HARM THAN GOOD.**

Let’s say a company’s digital offerings were not up to par with customer expectations. After wrestling with live chat or another online experience that didn’t meet their needs, customers will still default to calling customer support. 83% of survey respondents still engage with customer service over the phone.

Between 20-33% of consumers rated their provider’s digital service offerings from “needing improvement” to “horrible.” That means there’s major room for improvement in the CX space.

Additionally, 64% of consumers reported that they were unable to get help or solve their problems through customer service. Given the influx of call volume and long wait times at call centers, customers shouldn’t be forced to speak to a live agent, especially when they are already comfortable with digital self-service options. 55% of consumers said that they are familiar with real-time order updates and 40% are familiar with self-service appointment scheduling.

**Key Takeaway:** The lesson here is that having more channels (app, chat, text) available for customer service isn’t enough. You need to make relevant answers and self-service available on these new channels, or you’re really just adding friction to what will eventually be another call center interaction.



## TREND 6: YOU SHOULD BE AUTOMATING ORDER UPDATES.

Your support team and contact center staff field one type of customer request more than any other — order updates. In our survey, nearly half of survey respondents said their most common customer service need was to request an update on an order they had made or report an issue with that order.

Sending routine order update requests to your call center is both costly and inefficient. A customer shouldn't have to wait on hold for information that's already ready to be sourced directly from your CRM or backend tracking systems.

**Key Takeaway:** Using a digital CX platform like Airkit you can connect self-service experiences to your CRM and backend systems, giving customers the ability to access the order information they're after at any time. Now, when a customer calls support to request an order update, they can opt to be sent an SMS with a link to a web-based self-service experience in which they can enter their order number and check on its status instantly.

## 5 RECOMMENDATIONS FOR ACTION

**1) Assess your customer journey.** Understand how your customer converts from lead to paying customer, how they onboard, how they dispatch service, and how they expand. By understanding the customer journey, you can identify quick areas of improvement, volume of engagement, and resulting business impact of doing nothing.

**2) Deploy digital deflection.** Your customers won't wait 5-10 minutes on the phone, and many of these requests may not require human intervention. Assess your cost to service, call volume, and call handling times to see what types of calls can be deflected to digital self-service. For example, customers calling in to make common, high-volume requests can be deflected to self-service without agent intervention.

**3) Offer proactive digital service.** Use your customer data from your backend systems (CRM, contact center, transaction systems, etc.) to serve personalized 1:1 digital experiences to your customers. For example, if a customer has made a purchase, serve them a SMS to notify her of order status. Consider another scenario in which your systems have identified a slice of customers that will be impacted by a pending issue. Rather than using manual intervention, trigger a digital experience to notify customers of a pending service outage and a digital form to collect any additional information.

**4) Ensure you're omnichannel ready.** Your customers use multiple channels so ensure you're able to meet them where they are. Use omnichannel nudging (text, chat, email, voice) to nudge a customer to complete a journey (i.e., remind them to complete their enrollment process). Ensure that you can sustain context, so customers can swap channels and start where they left off.

## METHODOLOGY

From May to July of 2021, Airkit commissioned a study of 1000 adults in the United States. The goal was to better understand consumers' experiences with automated self-service options across a variety of industries and how behavior changed as a result of the pandemic.





## ENHANCE YOUR CUSTOMER EXPERIENCE

### CURRENT STATE OF CUSTOMER EXPERIENCE

The move toward consumerism started before the pandemic; however, the safety concerns and restrictions globally have had a profound impact on how consumers deal with almost all aspects of their lives. Retail customers no longer feel the need to shop in brick-and-mortar stores. Everything needed can be purchased online and picked up or delivered. More and more healthcare is being delivered via virtual visits. Information on benefits and eligibility of life insurance, medical and dental insurance, etc. can now be obtained virtually. For a business to remain relevant in today's customer-centric environment, customer expectations should not only be met but exceeded on every encounter. From Forrester's latest consumer survey, we know that 50% of online adults use technology now more than before the pandemic started to engage with companies. However, we also know that technology often feeds into a hybrid customer

experience, across digital and physical touchpoints. After all, consumers can connect to digital content anywhere using the mobile phone in their pocket.

The customer journey has evolved. Across industries, organizations adapt their customer experience paradigms or face losing customers to organizations that embrace the reality that customers expect immediate information at their fingertips. This new way of doing business must explore ways to mimic traditionally in-person and in-store customer experiences online. As more organizations work to keep up in this fast-paced, quickly changing landscape, a surge of hybrid experiences, including video-based "chat" between store/branch-based employees and digital customers has become reality.

As customers are less restricted by channels, organizations must follow suit. Supporting increasingly fluid and hybrid customer experiences will require more flexibility in terms of

managing technology and human resources. Organizations will shift from focusing on customer experience across channels to focusing on effectively serving customer needs across three interaction modes: self-service, automated, and person to person.

## CHANGING ENVIRONMENT AND NEED FOR IMPROVEMENT

In a world of seemingly limitless options, organizations rely on customer experience as the primary way to define and differentiate their brands, as well as build and maintain customer loyalty. In fact, according to a recent report from NTT, more than 80% of organizations say customer experience offers a competitive edge and more than half consider it their primary differentiator. But instead of deciding between customer satisfaction or costs, a recent IBM Institute for Business Value study showed a way organizations can achieve both. Based on the study, 99% of organizations using AI-based virtual agent technology report that it helps increase customer satisfaction, and 96% achieved a high return on their virtual agent investment. Studies have shown that virtual agents increase agent satisfaction by an average of 7%.

More consumers prefer virtual chats over traditional phone interaction. While chatbots have historically provided a simple way to surface the most common answers, their lack of understanding beyond FAQs has often left customers feeling frustrated rather than satisfied. Their irritation rises when forced to provide the same information repeatedly. Likewise, organizations are creating chatbots for specific, but overly simplistic purposes, meaning that once those immediate use cases are satisfied, the chatbot has little to no use afterwards. Covid-19 is an example of this phenomenon. Many companies added a chatbot to their electronic media presence for the sole purpose of telling customers whether masks are required for entry, if there are occupancy restrictions, etc. This narrow-minded version of a chatbot implementation solved an immediate need, but typically did not include plans for a future use of the technology.

Instead of investing in short-lived point solutions, organizations need to adopt a platform approach—utilizing the same framework to design, deploy and manage conversational AI that can serve customers consistently well no matter where they interact. In addition, organizations need AI that can accurately identify what a customer is trying to accomplish, especially when the intent is unclear,

the language syntax of the question may not match the chatbot's training, or the customer is speaking in a different language than the default for the bot.

Customer frustration also comes from information being distributed across multiple systems and departments. Often, when this is the case with a chatbot, the customer must be handed off to a human agent so they can correlate the information into a customer answer. Virtual AI-enabled assistants can integrate into multiple systems across multiple departments to obtain the needed data to respond to the customer inquiry. If the answer to the question still isn't easily obtained, the use of an agent-assist VI assistant can provide the perfect solution. Customers can get their less complicated questions answered without the need of a human intervention, while complex questions can be answered more quickly and consistently by the agent. Failure to find the right answers fuels agent turnover and leaves customers with a bad experience. The average annual turnover rate for agents in US customer centers ranges between 30% and 45%, resulting in approximately \$15,000 in turnover costs per agent departure.

## THE SOLUTION












There are plenty of tools, products, and best practices around how to build the ideal customer experience, but at a basic level it's about helping customers reach their goals in the fewest number of steps. The best solution needs to encompass the values of:

- Automating both simple and more complex customer inquiries across any channel
- Understanding complex language as well as conversational digressions
- Natural Language Processing (NLP) to continuously learn from and improve customer conversations
- Integrating conversational AI into existing applications, content, and data
- Ensuring security and data ownership while maintaining ongoing flexibility
- Selecting an AI-powered virtual assistant versus a simple chatbot
- Ensuring the assistant is agnostic to as many environment and software apps as possible to avoid unnecessary rewrites/re-implementations

DFS has created Coeus, an AI Assistant, as a text and voice assistant built on top of IBM's Watson Assistant and Red Hat's OpenShift. Coeus is easily integrated into complex business environments across industries, environments, and cloud platforms. This solution integrates your data – product catalogs, transportation routes, FAQs, benefit information – with artificial intelligence to help you deliver an informed conversation for your customer base. Coeus has been designed to understand and incorporate complex information into a conversational model, enabling more natural and accurate responses. By using a container methodology and a cloud agnostic design, Coeus can easily adapt to changes in your IT environment.

Coeus is built on a secure framework with proven industry-leading AI capabilities. Coeus supports multi-lingual speech and text and integrates across many tools. It can be implemented as a customer-facing agent and/or as an agent assistance tool. Coeus can understand real-world questions in natural language, both spoken or typed, and returns an answer in clear, concise terms in the language in which the question was asked. Those questions that require a greater level of nuance and insight can still be escalated to experienced agents. It provides fast and consistent information back to the call center agent, decreasing call times and costs. Those agents will utilize the tool to obtain the information needed to answer the questions fast, efficiently, consistently, and accurately.

## KEY BENEFITS

-  Quickly deploy and scale a cost-effective solution
-  Based on IBM's AI and Red Hat's OpenShift technologies
-  Provide fast and effective customer experience with consistent answers
-  Call center staff can focus on more in-depth and difficult customer issues
-  Provide solutions to your customers' needs
-  Better informed consumers thanks to 24/7 convenient and self-directed access to information
-  Gain recommendations on education and training for your staff
-  Lower call center costs and improved customer experiences
-  Reduce the number of calls handled by the agent
-  Fewer callbacks are required to solve customers' questions
-  Reduce the amount of time spent on a call

## ARE YOU READY TO IMPROVE CUSTOMER EXPERIENCE WITH AI?

Your customers deserve your best efforts to satisfy their needs. After all, your business will not succeed without their support. Coeus supplies the tools to make your customers life-long advocates of your products or services. At DFS, we are ready to assist you in planning your roadmap to an artificially intelligent virtual assistant to meet your current needs and grow with you into the future. Please visit our website at [datafusionspecialists.com](http://datafusionspecialists.com) or contact us at 888-933-7832.

Powered By:





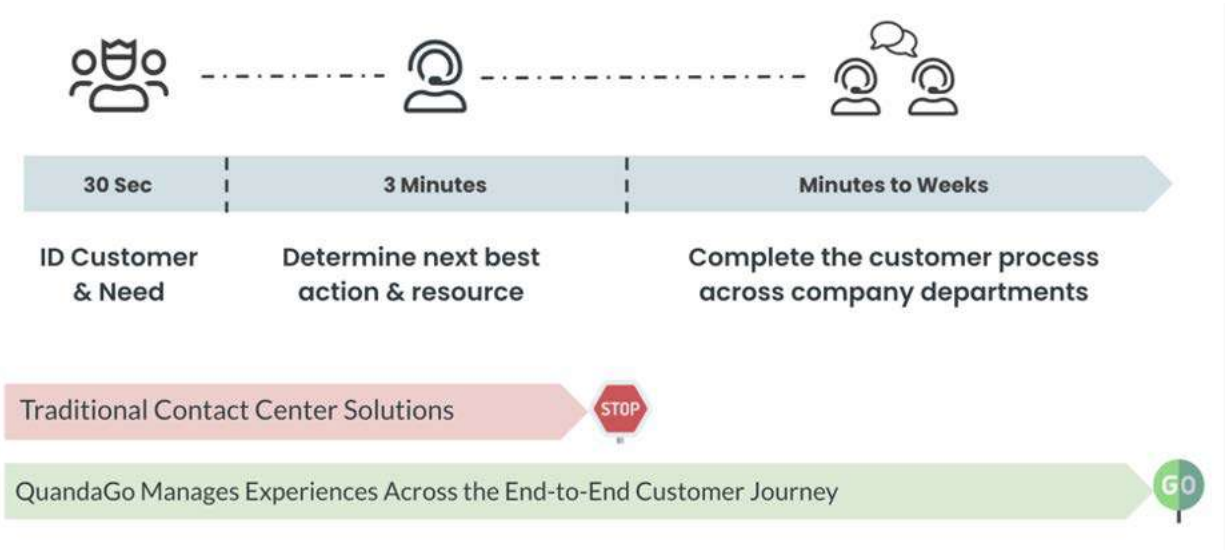
## THE CX AUTOMATION OPPORTUNITY

How will automation change the way you manage customer experience at your company or organization?

Up until now, success with AI and automation has been elusive for many companies—despite all the hype. While many executives report that they are investing in AI and automation initiatives—including chatbots and natural language self-service applications—few are achieving the digital transformation goals they imagined.

## CUSTOMER SERVICE STILL TAKES TOO LONG

The problem is that today's contact center and customer experience management solutions don't do enough for the customer. The industry and many companies have made great strides in effectively managing the first few minutes of the average customer call or contact, leveraging omnichannel interactions, intelligent routing, and IVR and speech technology to identify customers and their intent, and connect them to the right resources. In the end, however, it's typically the contact center agent that is left to search for answers across multiple systems to help solve the customer problem or complete the transaction.



## WHY CX FAILS

Today’s CX leaders and contact center managers have real opportunities to overcome this problem by automating customer interactions and processes across the customer journey—from the initial point of contact to final resolution.

In particular, conversational AI applications combined with intelligent process automation are opening up new possibilities for digital customer engagement—at the company website, in the contact center, and extending out to other company departments or locations—with the potential to reduce handle times by 50% or more, while assisting agents when live support is needed.

By removing manual tasks for both customers and agents, and speeding resolution across the end-to-end customer journey, companies can optimize the customer experience in a whole new way—with zero disruption to their current contact center infrastructure.

*The problem with today’s customer service solutions is that they don’t do enough for the customer.*

A common example: New customer on-boarding. For many companies—both small and large —managing this critical customer journey can involve several steps across multiple interaction channels, resulting in a time-consuming and potentially costly process both during and after the customer interaction.

The problem: From the initial point of contact, the journey is often disconnected for both customers and agents, making it inefficient to complete common tasks and processes. This is often due to a lack of having the right data or information available at the right time, and the need to complete several manual tasks and processes. If live support is needed, customers often need to start the customer journey over.

In the end—whether it’s new customer onboarding, product returns, change of address, case management or another customer process—a lack of efficiency, disconnected data, and inconsistency across channels and company departments leads to lower service levels, higher costs, and a negative customer experience.

## THE NEXT EVOLUTION: CUSTOMER EXPERIENCE AUTOMATION

We believe customer experience is the next natural evolution for automation in the enterprise, following in the footsteps of salesforce and marketing automation. Customer experience automation solutions powered by conversational AI and intelligent process automation—and always connected to omnichannel contact centers for live agent support—can bring new levels of efficiency and productivity across the end-to-end customer journey. This includes guiding customers from the company website and mobile app to the contact center and back office, and wherever their process or transaction needs to go for completion—while always providing transparent access to live support with context of the current interaction.



Leverage automation to replace manual and repetitive tasks & processes –for both agents and customers

For example, leading companies are using conversational AI to authenticate customer ID and determine intent at the initial point of contact—in a natural language, self-service mode. From there, integration to company knowledge bases and the use of intelligent process automation can be applied throughout the customer journey, enabling customers to complete most interactions in full self-service, over the channel of their choice. If help is needed, seamless integration with the contact center and back office departments can quickly connect customers to agents and employees—with a complete context of previous interactions and suggested next best actions.

Applying automation to tasks and processes across the end-to-end customer journey delivers benefits to your customers, agents and the business, including:

- Digital and often fully self-service customer experiences that increase satisfaction and loyalty.
- Faster handle times for self-service & live support—for an improved customer and agent experience.
- A significantly lower cost to serve by using process automation in combination with live support, while moving a high percentage of total interactions to full self-service

Improve efficiency in the contact center and back office by 50% or more and deliver a better experience for customers and agents.

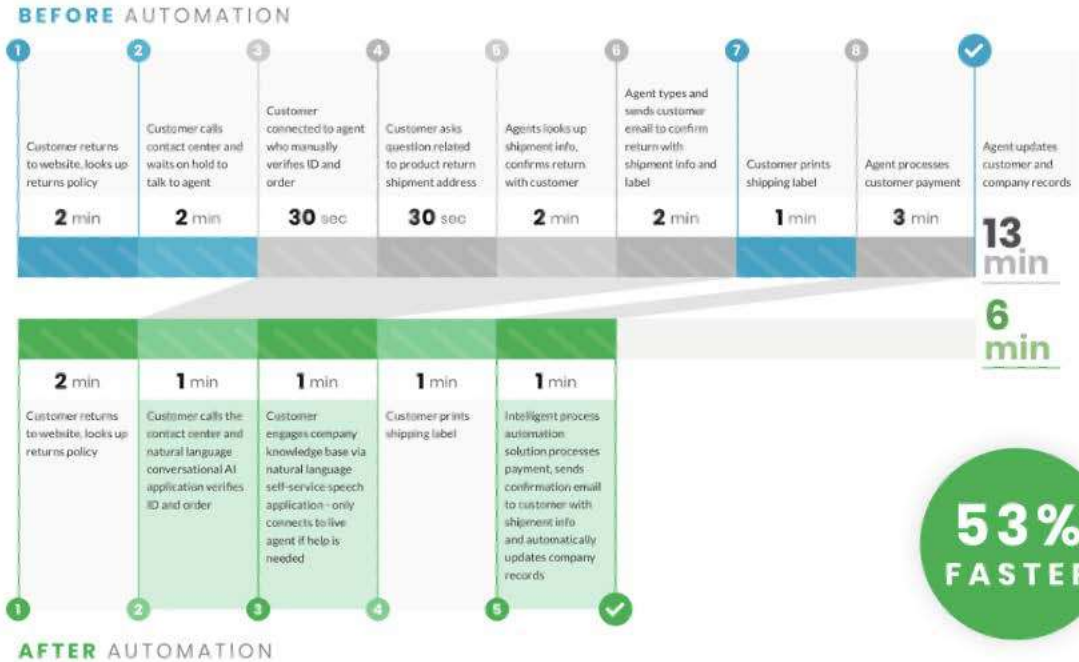
When done right, the addition of customer experience automation to your current contact center infrastructure and customer experience management environment has the potential to deliver big financial returns for your business—without the need to hire more agents.

### QUANDAGO CUSTOMER EXPERIENCE AUTOMATION

Customer experience automation starts immediately at the initial point of contact for any customer interaction. CX automation solutions engage customers and understand their intent in natural language conversations across all channels—voice, web, social, mobile—kicking off the customer journey.

From there, CX orchestration capabilities determine the next best action and deliver the customer to the best available resource. This can be either self-service or live agent support, depending on the nature or complexity of the customer journey.

## Automate the Returns Process





*Protect contact center infrastructure investments and minimize disruption with a fully open, flexible CX automation platform*

Finally, the solution automates tasks and completes processes across the customer journey. This can often start in the contact center or at the company website, and extend to other parts of the business, including the back office, to get whatever the customer needs done. Customer interaction context and the right data travel with the contact throughout the customer journey until completion. When live support is needed, agents are assisted with automated after call work, including the updating of company records to further reduce time to complete.

## HOW TO GET CUSTOMER EXPERIENCE AUTOMATION RIGHT

### 1. Implement a Self-Service First CX strategy

Design and orchestrate “self-service first” customer experiences that aim to resolve the majority of your interactions in a fully personalized, natural language self-service mode. Engage and serve customers with digital agents and process bots in the channel of their choice—web chat, messaging platforms, voice calls and mobile app—while always providing a transparent connection to customer service agents if live support is needed.

### 2. Automate Processes Across the Customer Journey

By analyzing manual tasks and common processes end-to-end—like onboarding customers, answering product questions or handling returns—companies can automate support for customers, contact center agents and back office employees. For maximum impact, look across the end-to-end customer journey. In many cases, integrated AI and automation solutions can complete both front end and back-office customer processes without the need for live support.

### 3. Keep Current Contact Center Infrastructure in Place

Leveraging APIs and today’s open, cloud based solutions enables companies to quickly implement cutting-edge CX automation solutions—on top of current contact center and communications infrastructure. Easily integrate new and powerful automation capabilities into your CX strategy. Extend your current contact center investments—no contact center refresh needed. Deliver a modern, digital first experience for your customers and agents.

## WHAT’S YOUR CUSTOMER EXPERIENCE AUTOMATION OPPORTUNITY?

Today’s customer experience automation solutions are opening up new and broader ways for you to impact the customer experience you deliver, especially during the critical stages that take place after the initial interaction in the contact center is done.

By deploying an open and flexible customer experience automation platform that runs within your existing contact center environment, you can continue to improve upon the customer front-end, while enabling for even bigger productivity and efficiency gains beyond the contact center and into the back office. This includes connecting contact center agents with Microsoft Teams users in the back office and other parts of the business, and supporting them with in-context interactions and automation of tasks.

## CUSTOMER CASE STUDIES

### Company: Engie – Renewable Energy Provider

#### The Challenge:

Before QuandaGo, the company's back-office was dealing with significant operational difficulties, impacting the customer and agent experience. Employees needed deep systems expertise, and customer journeys were disconnected. Business procedures didn't match customer interactions and typical dialogues, resulting in decreased customer satisfaction and increased service costs.

#### The Solution:

Engie is now operating a customer process management platform with an intuitive agent interface and a clear structure where employees can easily and effectively accomplish their tasks. With QuandaGo, Engie was able to integrate an omnichannel contact center with business process automation, driving greater agent efficiency and improved CX. Engie realized a more than 3-minute reduction in average handle time (SHT) and a 50 percent improvement in NPS scores, with 85 percent of contact center tasks supported by process automation.

### Company: Blokker - Retail Transformation with CX Process Automation

**The Challenge:** In order to keep up with rapidly changing needs in customer contact and engagement, retailer Blokker was looking for a solution and partner capable of providing speed, flexibility and continuous improvements to its customer experience, including its contact center and across its business operations.

**The Solution:** With QuandaGo, Blokker is now able to keep an accurate overview of its complex processes. Data analytics provided by QuandaGo support its day-to-day business to drive continuous improvements and increased efficiency. Blokker also uses chatbots and automation to offer 24/7 support to customers to optimize costs, while offering live support by agents for customers with more complicated questions or high-value interactions to improve the customer experience. Blokker has achieved a 2.5-minute reduction in average handle times (AHT) and a 15% cost reduction, with the ability to handle more interactions with the same amount of agents.

## ABOUT QUANDAGO

QuandaGo provides a cloud-based platform that brings together omnichannel contact centers, customer knowledge management and process automation in a single solution. Today, the company helps manage more than 100 million interactions for customers in the retail & direct-to-consumer, financial services, travel & logistics, BPO, utilities and government sectors.



CALABRIO

## RESOLVING COMPLEXITY IN THE CONTACT CENTER

A Guide to solving the paradox of modern workforce engagement

### ADAPT OR PERISH: CHALLENGES PRESENTED BY A WORKFORCE THAT LOVES THE NEW NORMAL

#### A NEW HYBRID EMERGES

The reality of the remote contact center — agents working from home offices, kitchen tables, bedrooms and basements — took shape quickly in 2020. Governments issued stay at home orders, IT teams pushed operations to the cloud and organizations quickly learned that even if they suddenly shuttered office buildings, work could continue. There were some hiccups in terms of business continuity and network security, but for the most part, IT teams improvised, experimented and successfully crammed six years of cloud transformation into six months during the middle months of 2020.

Contact centers were among the first remote work models to be spun up, because that was the lifeline for that connected customers with brands. Service levels and

supply chains were under pressure — and consumers wanted reassurances. In many cases, it was the first time many consumers accessed products and services primarily through digital channels. It was a big shift and people needed guidance.

But what started as an emergency fix has quickly evolved into a new reality and it seems there's no going back. Remote and hybrid workforces are here to stay, partly because some CFOs anticipate driving measurable savings by minimizing physical office space and their c-level counterparts in human resources are excited about tapping into greatly expanded talent pools. But remote and hybrid work are here to stay mostly because workers want it. They've experienced a large dose of work from home and many like it. In survey after survey, workers express a deep affinity for hybrid work models that offer a mix of home and office days. Not only do they like the idea, many are insisting on it. They know if one employer won't give them hybrid or remote flexibility, another one likely will.

## CONFLICTING VIEWS: SENIOR LEADERS VS. YOUR AGENTS

The widespread adoption of remote and hybrid work has contact centers — and enterprises as a whole — experimenting with different models to find the right configuration to meet their business objectives.

For most organizations, devising the right hybrid model is not an easy process for two reasons. First, worker and C-level appetites for remote or hybrid work differ greatly. In a 2021 survey conducted by McKinsey & Company, more than 75% of C-suite executives indicated they expect the typical “core” employee to be back in the office three or more days a week. Most acknowledge that the work-from-home models spun up by their IT teams were largely successful and, frankly, had saved the day when it came to maintaining customer relationships and the flow of revenue. Enterprise leaders, however, also believe remote work diminished organizational culture and the sense of organizational belonging. They’re generally anxious to get employees back in physical workspaces and they’re generally envisioning a new normal that’s somewhat more adaptable but not hugely different than pre-pandemic realities.

Workers tend to share a different view of the future. Approximately 75% of the 5,000 workers surveyed by McKinsey said now that they’ve experience remote models, they prefer to work from home for two or more days per week. Half of the workers surveyed indicated an even stronger desire for remote work, saying they prefer three days at home and two in the office each week. One thing to note from that study, however, is that while they like working from home, most are cognizant of potential pitfalls, citing common problems, such as excessive fatigue, difficulty disconnecting from work, deterioration of social networks and a diminished sense of belonging.

## CONTACT CENTER LEADERS CAUGHT IN THE MIDDLE

So where does this leave contact center leaders? Stuck in squarely the middle, in most cases. Senior leadership will want to rebuild and protect culture by maximizing in-office days for agents and other workers. Agents will want more flexibility and more days at home.

Not acquiescing to worker demands for more hybrid flexibility can be dangerous, especially for organizations that historically face recruitment challenges. In some economic environments, workers might feel lucky to have jobs, so they’ll bend willingly to enterprise policies they don’t like.

But this is not one of those economic environments. In fact, the U.S. Labor Department estimates that a record 4 million people quit their jobs in just April 2021 alone. Since then, job vacancies have climbed to a 20-year high. What’s worse, enterprises are struggling to find candidates to fill those jobs.

In what business leaders, pundits and media are calling “The Great Resignation,” people are fearless when it comes to leaving jobs if employers don’t give them what they want. A prevailing theory is that while at home during the pandemic, workers migrated from fear about their economic wellbeing to a state of self-reflection. They spent time assessing their careers and what they want for both their work and personal lives. It turns out that work-from-home flexibility is a benefit a majority of workers have discovered they like.

So, for the contact center leader who is stuck in between c-level’s desire for getting people back in the building and workers insisting on flexible hybrid work models, the path forward may not be much of a negotiation. Given the level of job vacancies and worker willingness to resign over even small issues, the reality is that hybrid work models might be the only way forward if the desire is for fully staffed teams.

## THE RISE OF THE PRODUCTIVITY KILLER: COMPLEXITY

This situation, in any organization, is rife with the natural enemy of the contact center — complexity. So many of the processes contact centers had trusted in the past — from hiring to onboarding to coaching and performance monitoring — were built for traditional butts-in-seats work models. While the world knows remote models can work, there are many questions regarding customer engagement, worker productivity, skills training, quality of work and, of course, operating costs.

Navigating this complexity might be the single most rigorous test contact center leaders face in 2021-22. While the initial jump to remote work was frantic and frenzies, yet somehow mostly successful, this transition to a hybrid-based new normal will require a more strategic approach and thoughtful deployment of enabling cloud-based technologies.

## DRIVERS OF COMPLEXITY: KEY CHALLENGES AWAITING CONTACT CENTER LEADERS IN THE NEW NORMAL

### Recruitment + Retention

For agents looking for work, it's a seller market. They can find job listing in almost any large contact center. Competing for new talent will likely require a new approach. Retention will be harder than ever, as good agents will be lured by opportunities for better pay and more flexible work environments.

### Onboarding of New Employees

Once elusive talent is hired, the process of onboarding is more challenging. How do you convey culture to a remote worker? How do you demonstrate specific skills and build a granular understanding of the brand and what it stands for?

### Coaching + Performance Management

While technology platforms have evolved rapidly, the art of coaching agents has often involved physical observation and precisely timed face-to-face interactions — remote work models clearly place more pressure on digital tools and reimagined processes.

### Data Silos + Blackholes

The move to cloud infrastructures and intelligent data management tools is helping, but most organizations are not efficient when it comes to making relevant and timely data available to customerfacing employees — remote work models add to the complexity.

### Omni-Channel Expansion

The pandemic forced many consumers who prefer face-to-face and brick-and-mortar experiences to become adept at using online and mobile tools when interacting with brands. This trend will continue, and customers will expect seamless interactions regardless of which channel they choose for a particular interaction.

### Changes in Brand Beliefs + Behaviors

The pandemic added a new wrinkle to brand loyalty formulas for most consumers. Availability, responsiveness and resilience moved up the list and changed brand beliefs and behaviors across all industries. Engaging and satisfying these changing buyers is a new challenge for experience and novice agents alike that becomes more complex in a hybrid work environment.

### New Competitors

Just as enterprises you never heard of will be trying to lure away your agents, entirely new competitors will emerge and target your customers. Fending off new competitor requires brand knowledge, defense strategies and shared tribal knowledge. How do you make all of that available to agents in a remote workspace?

## GUIDANCE BASED ON BEST PRACTICES

Change is inevitable and, for the most part, it moves enterprises to a better place — if the complexity that accompanies change doesn't wipe you out first. For contact center leaders, the majority of ominous complexities resides in emerging hybrid work models. Everything feels different. Even if you're lucky enough that your agents come back into a physical office space two or three days a week, the methods you've perfected for hiring, onboarding, training, coaching, evaluating and growing are likely in need of refinement. Or maybe even an overhaul.

Part of the answer, of course, will be technology. Hybrid or remote work environments are by definition virtual. Managing that environment requires processes and tools that are equally digital in nature. Fortunately, most contact centers have moved at least some of their workflows and workloads to the cloud. So, most have momentum in the right direction.

No matter where you are on your path to the cloud — or your road to digital transformation — an entirely new mix of obstacles and rewards await. Every organization and every contact center will face unique challenges and carve their own path to the future. But, in general, there are some things you can do to mitigate the complexity that will inevitably pervade the new normal of hybrid work models.

## RESOLVING COMPLEXITY IN THE HYBRID WORK ENVIRONMENT

### Adopt a Self-Service Mindset

The technology exists for empowering agents to manage their own schedules. You don't relinquish control and oversight — you just get rid of the busy work. Some platforms are better than others, but the technology is evolving to the point where you greatly mitigate complexity by putting the power back in the hands of the agents themselves. The same thinking applies to schedule editing. Put the task of aligning agents shifts and breaks with predicted call volumes back onto the agents.

### Explore and Adopt AI/ML

We've heard about AI (artificial intelligence) and ML (machine learning) for years. They're not new technologies, but mainstream applications are just emerging — and they work. Seek out workforce management (WFM) tools that attack complexity by replacing manual tasks with the millisecond speed of chatbots. Leverage AI/ML tools that streamline WFM processes — from advanced forecasting for smarter long-range planning across all channels, to real-time analytics on intraday operations to help resource planners easily monitor and balance call volume, align staffing with customer demand, and rapidly respond to surges.

### Lean into Metrics

The same WFM platforms that simplify scheduling also offer advanced reporting features that allow you to (a) identify the metrics that matter most and (b) share those metrics with agents, whether they're working at home or in a central office. Be aware that metrics are changing as your omni-channel reality evolves. From call abandonment and average time in queue to service levels and speed of answers, customer expectations are changing rapidly. What you measure might have to change. Leveraging technology to share those meaningful metrics in real-time with agents simplifies your management tasks.



## Deploy Remote Coaching + Live Monitoring

In a central office setting, you and your agents could rely on pre-scheduled training sessions or ad-hoc peer meetings. That's not possible with remote work, so it's time to rethink coaching. Explore processes and technologies that allow your coaching process to become more data-driven. When they work remotely you can't spot struggling agents visually. Find a way to use data to identify real-time coaching opportunities. Also, experiment with new formats, including self-coaching, peer coaching, group training and targeted coaching engagements driven by technology that identifies outliers — times when an agent is struggling more than their peers.

## Ensure 100% Omnichannel Engagement Capture

Customer expectations and behaviors have changed more in the last six months than in the last six years. They're proficient with all channels of communication and they expect your agents to be equally proficient in any channel they choose. Even more, they expect you to resolve the complexity of an omni-channel environment. Any information they've communicated across phone, text, chat, email or video chat, they expect you will consolidate and use to make every experience seamless for them. Remote or hybrid work models add complexity to this, as agents will need fast access to relevant data for each customer. Look for technologies that simplify this process. Key functionality will include advanced reporting and customer experience integration. Also, look for platforms that offer modern media players that display all analytics results from both structured and unstructured data. The right tools will offer call sentiment scores by agent and by caller, along with full voice transcriptions during playback.

## Delight Your Customers by Understanding Your Agents

To lead in CX, you can't afford to react to what happened last month, last week, or even yesterday. You need to have real-time insights into how customers are feeling and acting. Gaining this real-time insight requires a multi-faceted analytics toolkit. Sophisticated sentiment analysis enables contact centers to get a genuine read-out of how customers are reacting to interactions in the moment — a true finger on the pulse of customer sentiment. Zooming out, organizations should look to leverage AI-driven

predictive evaluations to finally consider every customer and every interaction in its big-picture perspectives on CX. But CX leaders know that looking at the customer is just the start; you need to understand what your agents are doing in order to drive meaningful improvements. Look for tools like desktop analytics to correlate what your customers are saying — and how they're feeling — with how agent are engaging technologies and making use of their time. Give your agents dashboards with embedded analytics insights — and build analytics-enhanced QM programs that home in on quick-win and big-impact opportunities for agent coaching. And to bridge the team-building challenges inherent in remote and hybrid work models, leading platforms are now pulling all of those agent analytics insights together into intuitive, at-a-glance agent profiles that help managers stay up-to-speed and deeply familiar with every agent — no matter where they're located.

## FINAL THOUGHT: AVOID INCREMENTAL THINKING

Mitigating complexity is a key to making the new hybrid work models work for your customers, your agents and your enterprise. The converging realities of hybrid work, cloud transformation and analytics-driven client engagement are creating an entirely new reality for contact center leaders and their agents. Historically, enterprises have been able to adapt to change by modifying and evolving legacy systems and processes to align with new challenges. But the rate of change regarding customer beliefs and behaviors is so extensive and the gap between legacy on-premises systems and cloud technology is so vast that incremental improvements or changes are likely to fail. It's important to approach the concept of mitigating complexity like you're starting over. It will likely be faster, more affordable and more efficacious to build on new technologies, new processes and new thinking.



infobip

## BOLT: DRIVER CONVERSION UP 40% THANKS TO NEW REGISTRATION JOURNEY

We helped ride-hailing company Bolt to optimize its driver registration journey and secure a 40% rise in conversion rate.

### CHALLENGE

#### RIDE-HAILING COMPANY BOLT AIMS TO BOOST CONVERSION THROUGH DRIVER REGISTRATION JOURNEY

Ride-hailing company **Bolt** is making waves in the transportation industry. The billion-dollar, Estonia-based company gives people a fast, affordable way to move around cities in Europe, Africa, Western Asia, and Latin America.

At the heart of its operations is a large and thriving community of more than 1.5 million registered drivers.

Expanding this community of drivers is key to Bolt's ongoing success as the company continues to grow and scale.

That's why the company was keen to optimize the driver registration process to further increase the conversion rate (i.e. the percentage of drivers who complete registration after starting the process).

The existing registration process was a five-stage website form. Analytics showed that drivers who abandoned the process mostly did so when they reached the step where they're asked to upload their identification and driver license documents.

To try and re-engage these drivers, the team was using channels such as email and SMS, but this strategy was not providing high return on investment and involved a lot of manual effort from customer support agents.

Bolt therefore wanted to use automation and an additional communication channel with wide market adoption to drive efficiencies and increase the percentage of drivers who complete registration.

Bolt relied on web forms to register and onboard drivers

## SOLUTION

### CUSTOMER ENGAGEMENT SOLUTION BRINGS AUTOMATION AND EFFICIENCY TO DRIVER REGISTRATION

To help Bolt improve the registration experience and hit its conversion targets, we developed an optimized driver registration process over **WhatsApp**, powered by:

- our chatbot-building platform, **Answers**;
- our cloud contact center solution, **Conversations**; and
- our omnichannel customer engagement hub, **Moments**.

Now drivers can complete the entire registration process using a chat app they know and trust. A chatbot guides drivers through the entire journey, while live agents process drivers' information.

These agents are also on hand to provide additional assistance where needed, taking insights from chatbot conversation histories, thanks to the close integration between **Answers** and **Conversations**.

Meanwhile, advanced analytics powered by **Moments** allow the team to track where drivers abandon the registration process and send automated reminders to bring them back into the journey.

The bot guides drivers through every registration step in a friendly and informative way

If a driver drops out of the registration journey on **WhatsApp**, automated reminder messages are sent via the chat app at timed intervals to help them pick up where they left off

Document upload steps used to see a lot of drop-off from the website registration form. Now, drivers can share their document and scans quickly and easily using **WhatsApp**.

Together, our flexible, cloud-based technologies provide a host of business benefits:

A better experience for drivers: drivers can quickly and easily complete their registration without needing to contact Bolt staff. The chatbot makes it easy for drivers to upload and send rich media and complete registration outside contact center opening hours. Agents are on-hand to provide additional assistance where needed.

A better experience for agents: **automating customer service** across the registration journey minimizes the manual effort required to convert leads into registered drivers. This improves the agent experience by reducing the number of repetitive tasks and allowing them to process drivers' information and documents using a single workspace.

Lower operational costs: **WhatsApp** is a more cost-effective way to reconnect with drivers and, with the help of the chatbot, Bolt can process a higher volume of registrations.

An even more customer-centric approach: customer-centricity is at the heart of Bolt's business and our solutions are helping to support this with new communication channels – from **WhatsApp**, to Facebook **Messenger** – and with additional opportunities to automatically and proactively re-engage drivers.

## RESULTS

### OPTIMIZED REGISTRATION PROCESS BOOSTS CONVERSION RATE BY 40%

The optimized driver registration process enabled Bolt to achieve its goals and secure a 40% rise in conversion rate.

Thanks to **Infobip's** flexible and scalable SaaS suite, Bolt can offer a superior experience to drivers and staff alike:

Drivers can use a mobile messaging app they already know and trust to register in a fast, friendly, and efficient way.

Agents can handle a higher volume of inquiries and enjoy a reduction in repetitive, manual tasks.

Bolt can support drivers at every step in the registration and proactively bring lost leads back into the registration process, right where they left off.

This data-driven, customer-centric, and scalable approach to driver onboarding and engagement gives Bolt the real-time insights it needs to continually improve these experiences.

Thanks to its successful trial in South Africa, the solution was scaled and rolled out to an additional eight countries in Africa and Europe.

Bolt is now looking to further optimize the registration journey and add additional channels to boost its driver acquisition efforts and deliver a localized approach in each region.

## COMPANY PROFILE

### Bolt



Bolt is a transportation platform providing ride-hailing, micromobility, and food delivery services, with the help of its more than 1.5 million registered drivers. Headquartered in Tallinn, Estonia, it operates in more than 200 cities across 40

countries in Europe, Africa, Western Asia, and Latin America. Used by 50 million happy customers, Bolt's ride-hailing services provide a fast and affordable way to move around cities. The company is committed to helping cities improve mobility, minimize car ownership, and reduce urban pollution.



*"Infobip helped us improve the way we register and onboard drivers using WhatsApp. We used Answers, Conversations, and Moments to enhance our driver registration process and achieve additional growth in conversions. Together, these technologies mean we can deliver better experiences to drivers and optimize internal processes. Our strong partnership with Infobip helps support the company's rapid growth." Yev Baluyeva, Lifecycle Marketing Manager, Bolt*

## APPENDIX





-  **The Role of Conversation Analytics in Creating the Next Gen CIO**
-  **Driving Business Improvement with Conversation Analytics**





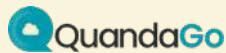
-  **OpenTable Case Study**
-  **Product Demo for Contact Center Ops**





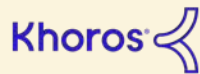
-  **Enhance Your Customer Experience**
-  **Enhance Your Call Center Efficiency With Coeus™**





-  **Agent Well-Being – Survey**
-  **Resolve contact Center Complexity Hybrid WFM**





-  **5 CX Automation Use Cases You Must See**
-  **What's Your CX Efficiency Opportunity?**





-  **The Digital Service Funnel Guide: 4 steps to effectively manage the customer journey**  
Starting, revamping, or fine-tuning your customer journey? Khoros's service experts cover what you need to know to maximize both quality and efficiency.
-  **The essential guide to creating powerful contact center change**  
Learn how to build your team — from the front lines to the C-Suite — to initiate, enact, and sustain powerful contact center change.



-  **Blending Speech Analytics with Traditional QM**
-  **DVSAnalytics arriva Case Study**




-  **Whitepaper: The New Wave of Customer Support? AI**
-  **Study: Consumer Preferences for Resolving Support**



 **Conversations Transform Your Contact Center To Enhance Your Customer Experience**

 **Bank in Brazil that had reduced cost of call centers with Whatsapp solution**



 **Doing Contact Center QA the Right Way - The Complete Guide to Call Center Quality Assurance**

 **Understanding the Increased Role of Service Agents in the Modern Customer Experience**



 **White paper: Mobilizing the Customer Service Experience**

 **Infographic: Businesses Need Advanced Customer Engagement and Retention**



 **Realplay Bot Shrinks Contact Center Attrition**

 **Siloed Inefficiency Omnichannel Transformation**



## 2021 EDITORIAL CALENDAR

### JANUARY

**State Of Contact Center Technology**



### FEBRUARY

**Strategic Planning For CX Operations**

February 9-11, 2021

### APRIL

**New Benchmarks For Customer Contact Performance**



### APRIL

**State Of Contact Center Technology**

April 6-8, 2021

### JUNE

**Customer Contact Industry Review**



### MAY

**New Standards For Customer Contact Performance**

May 25-27, 2021

### JULY

**Modernizing Service Experiences With AI & Digital**

July 20-22, 2021

### AUGUST

**Customer Experience Trends, Challenges & Innovations**



### SEPTEMBER

**Customer Experience Trends, Challenges And Innovations**

September 14-16, 2021

### NOVEMBER

**Future Of The Contact Center: A Forecast**



### OCTOBER

**Business Continuity 2.0**

October 26-28, 2021

### DECEMBER

**Future Of The Contact Center: A Forecast**

December 14-16, 2021

## MEET THE TEAM



**Brian Cantor**

Principal Analyst, Director

**CCW Digital**

E: [Brian.Cantor@customermanagementpractice.com](mailto:Brian.Cantor@customermanagementpractice.com)



**Simon Copcutt**

Head of Strategic Accounts

**CCW Digital**

E: [Simon.Copcutt@customermanagementpractice.com](mailto:Simon.Copcutt@customermanagementpractice.com)



**Andy Kuang**

Marketing Manager

**CCW Digital**

E: [Andy.Kuang@customermanagementpractice.com](mailto:Andy.Kuang@customermanagementpractice.com)



**Matt Wujciak**

Staff Writer & Editor

**CCW Digital**

E: [Matt.Wujciak@customermanagementpractice.com](mailto:Matt.Wujciak@customermanagementpractice.com)



**Emily Dunn**

Marketing Manager

**CCW Digital**

E: [Emily.Dunn@customermanagementpractice.com](mailto:Emily.Dunn@customermanagementpractice.com)