



***Want to Optimize
Customer and Agent
Journeys?***

Empower Supervisors

March 2016



The Customer Experience Revolution is Upon Us

A revolution is taking place. It is a revolt by consumers no longer willing to wait on hold to talk to contact center agents who ask repetitive and irrelevant questions. It is an uprising by millennials who ignore the customer service channels of earlier generations. It is a comeuppance to information technology professionals who have known digital interactions were the future for over a decade and have done too little to prepare their companies for it.



When customers call into a contact center, it is increasingly not the first step they've taken to solve their problem or get an answer to a question. They have typically tried some kind of self-service, like visiting the company's website, used web chat or sent an email. They may also have reached out on social media or tried using a mobile application.

In 2016, the importance of these non-voice channels is clearer than ever. For almost a decade, contact center pundits have forecast that email, web chat, social media and most recently mobile application interactions would inalterably change the contact center landscape. It turns out that it is not any one of these digital channels but a combination of them all that is heralding a new era in customer care. After years of steady change, the tipping point is upon us.

The most thought-provoking prediction from Dimension Data's 2015 Global Contact Centre Benchmarking Report is that digital interactions will overtake voice calls by the end of 2016. And solution providers and customers are scrambling to create offers and deploy applications that match this reality. Projects that had been on the "someday" list of things to do for many companies, like adding web chat or SMS channels to their customer care operations, have suddenly risen to the top.

Syncing Customer and Agent Journeys

Much has been written about the need to improve contact center visibility into the journey that a customer is on, instead of handling each interaction in isolation. A customer journey viewpoint is far from universal, but more and more companies are recognizing the value of identifying - and then trying to simplify - the steps required to complete routine tasks.

Less has been said about how the digital transformation of customer interactions has influenced the agent's journey. An agent journey consists of the different steps an agent must take to understand the customer's issue, find the information and respond to an inquiry.

Self-service handles an increasingly larger proportion of customer interactions. That's the good news. The bad news is that interactions that do get routed to agents are more complex than ever before. They are the tasks that customers have already tried one, two, or even more ways to accomplish – and failed. What is needed are smarter agents. Oh, and make sure they are fast too. Because customers have already invested more time on the issue than they think it should have taken by the time they get to a live agent, either on the phone or via web chat.

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The Evolution of Agent Coaching

Let's look at the supervisor tools available to create this required generation of "super agents." Agent monitoring has actually been around longer than even the contact center. In the days of cord board telephone operators, a supervisor would plug in alongside a telephone switchboard operator and evaluate his or her performance in real time. Or an operator could signal to a supervisor that he or she needed help with a difficult caller or task, and, again, the supervisor could plug a headset into the board, sometimes directly working with the customer.

As commercial call centers evolved, the monitoring of calls by supervisors continued to be a tried and true method to train agents and improve the quality of calls. A manager would sit next to an agent and listen to how he or she handled a call or a series of calls – sometimes plugging into an auxiliary jack to listen to both sides of the call - and provide immediate feedback.

When modern telephone switching equipment arrived, so did the ability to do remote, silent monitoring. The goal was to remove the "observer" bias in performance management. A supervisor could listen to calls unobtrusively and unannounced. It also meant that as virtual contact centers emerged, with supervisors no longer always co-located with the agents on their teams, real-time monitoring could still be accomplished.

However, as something was gained - location independence - something was also lost. The natural connection between evaluation and coaching began disappearing. Quality management morphed into a function that was more about correction after the fact than instructing agents on how to ease a customer's path to resolution in the moment.

New Challenges in a Digital Interaction World

At the same time that supervisors were increasingly located remotely from agents, the workflow of those agents was changing. In the early days of call centers, paper and pencil were used to record information, and agents searched for data in printed reference materials. By the end of the 1990s, the de facto standard became agents working on computer screens. That is when a new challenge emerged – evaluating not only what agents were saying over the phone but what they were doing on the screen.

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The early technology solution to this problem was simultaneous recording of voice and the agent screens. But this turned out to be a complex and often expensive solution that only a relatively small proportion of contact centers actually implemented. In its 2015 Global Contact Centre Benchmarking survey, Dimension Data asked what solutions companies were using to enable the quality of contact center services. While over 80% reported using voice recording technology, just 36% had deployed screen recording.

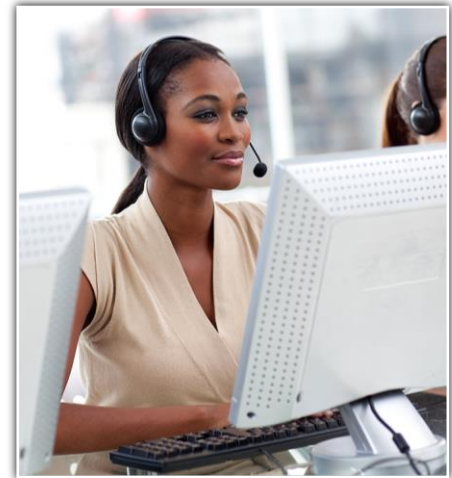
With companies still struggling to implement solutions like screen recording to cope with the introduction of personal computers, the Internet and cloud-based CRM applications into the agent workflow, a similar digital transformation on the customer side of the contact center interaction is underway. No longer are customers interacting with companies only over the phone. They too are using the Internet, with a host of different types of fixed and mobile computing devices.

The combination of the increasing complexity of the agent task and the variety of mobile tools and applications being used by customers reaching out to contact centers has created a need for a new kind of supervisor tool.

Supervisor Assist

In 2016, CaféX brought to market a new class of coaching tool, Supervisor Assist, designed to meet the accelerating demands of today's omni-channel contact center with the latest technology. It has been designed with a set of features that meet the needs of enterprise companies grappling with the demands of agent coaching and interaction quality management in a digital world.

To better understand the needs of today's contact centers, and how to design a solution that addresses them, CaféX worked with a small number of very forward-thinking companies. These Fortune 100 brands are customer experience thought leaders that are looking to incorporate the very best technology and processes available to continue to be on the cutting edge. And they are willing to invest the resources required to work with application providers to help design and fine-tune these forward-looking solutions.



Omni-Channel Training and Coaching

A major financial services firm (referred to here as FinServ), already a customer of CaféX, was one of Supervisor Assist's first trial users. A global company with thousands of in-house and outsourced agents, FinServ has been using voice and screen recording for quality management purposes for several years. For real-time training and coaching, only audio monitoring was available.

As part of its training process, FinServ has new agents shadow experienced ones – a great way to learn in a real-world setting from those already doing the job well. With only voice monitoring, the trainee is not able to see what experienced agents are doing - what they are clicking on or what screens they are looking at. While helpful, it only gives the trainee half the picture of what how to handle the interaction.

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At a later point in training, new agents start handling live interactions with the support of experienced agents or supervisors. Again, with only audio monitoring available, the mentor agent is unable to verify the accuracy of information being entered. For example, he or she can hear the account number but doesn't know if it was entered correctly. Also, it is impossible to tell if the trainee is struggling with navigating the required screens and applications.

Supervisor Assist was built to support both of these aspects of agent training - mentor shadowing and peer coaching – with not only audio and screen real-time monitoring, but a set of collaboration tools as well. A trainee watching an experienced agent is able to see every click that is made, every application that is accessed and every data field that is entered. Supervisor Assist also has an enhancement planned that will allow multiple trainees to watch the same mentor agent – creating an opportunity for many to simultaneously learn about how to handle a specific new product or customer interaction.

Supervisor Assist also plays a role in the ongoing coaching of agents by adding location flexibility. FinServ contact center management says that in a brick-and-mortar building, where supervisors are stationed right next to all of their people, they have the luxury of taking a headset and plugging right in with agents to observe what they are doing and coach, side-by-side.

What a tool like Supervisor Assist does is give the company the flexibility to create teams that have members in multiple locations and still provide personalized coaching. “As a supervisor, I can be in one location monitoring my team in real-time and potentially have my team somewhere else.” Supervisor Assist allows a team leader to do virtual side-by-side coaching. The coaching and feedback is delivered via the collaboration tools that Supervisor Assist offers, such as personal chat.

Just-in-Time Intervention

One of the most dreaded lines a contact center agent can hear, and just as unpleasant for a customer to utter, is “May I speak to your supervisor.” As relayed by FinServ, “if you’ve gotten to the point where the customer already wants to talk to the supervisor, it’s too late for an assist tool.”

FinServ believes that Supervisor Assist becomes valuable in the, “oh my gosh, things aren’t going well, I need help” phase of an interaction. Supervisor Assist provides the ability for the supervisor to see the screen and hear the customer’s voice. He or she can then know when to step in and help out. FinServ believes this will be especially helpful for brand-new agents who are taking calls early on in their company tenure and aren’t yet confident and familiar with the required tasks.

Supervisor Assist is planning a “raise your hand” feature that allows agents to signal a supervisor that they require assistance. This means that agents can alert their team leader that they may need help, even before the situation escalates. The supervisor is able to “spotlight” a portion of the agent’s screen, communicate with the agent via a private chat or even take actions on behalf of the agent to bring the interaction to a successful conclusion.

Investing in New Tools for a New Age

It’s amazing to think how the digital transformation of the past ten years has empowered customers. It is forcing companies to constantly review how they support customer preferences to interact with them, first over email and web chat, then SMS and most recently over social media channels and video. It’s time to bring that same digital transformation to training and coaching, and empower contact center management to meet the “get it right, the first time” demands of customers.

With so many projects vying for scarce contact center investment dollars, it might be easy to conclude, “Supervisor Assist would be nice to have but there’s no way to get budget for it.” One way to think about new spending is how it will impact existing costs. Even with the dramatic shift to digital interactions, labor continues to be the most significant line item in a contact center budget, typically 65-75% of the total. A live coaching solution can help reduce two major elements of that cost: training and attrition.

Bringing a new agent online and handling interactions can take from a few hours to a few weeks. Getting that same agent to expert status typically takes months. A live coaching solution can enable new agents to shadow experienced ones and veterans to coach new agents – practices that will markedly shorten the time-to-productivity.

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Attrition can result from two related phenomena. Agents may be dismissed because of low performance or may resign because they feel they have insufficient knowledge or training to be successful. In either case, the company has invested in an asset and not achieved the expected return. A live coaching solution can have a direct impact on both of these force-impacting expenses. Similar to other solutions used for workforce optimization, CaféX Supervisor Assist is pre-integrated with the contact center applications of most leading vendors. This investment protection can be particularly important to companies with different contact center infrastructures in multiple locations or those planning to migrate from one vendor to another over time.

About CaféX

CaféX makes it easier for companies to enhance live engagement within web and mobile applications. CaféX's award-winning software embeds real-time collaboration within the context of business workflows to increase customer satisfaction and employee productivity. Trusted by many Global 2000 companies, CaféX software brings together WebRTC and enterprise communications technologies to create omnichannel experiences that unify the customer journey, accelerate innovation and protect existing IT investments. For more information about CaféX, please visit www.cafex.com or follow [@CafeXComms](https://twitter.com/CafeXComms).

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Sheila McGee-Smith, the founder and principal analyst at McGee-Smith Analytics, is a leading communications industry analyst and strategic consultant. Her insights help enterprises and solution providers develop strategies to meet the escalating demands of today's consumer and business customers. Her views on the market can be found regularly on NoJitter.com and through her Twitter feed [@mcgeesmith](https://twitter.com/mcgeesmith).