Unified Employee Desktop

Best Practice Guide
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Introduction

Customer service employees have a difficult job. Products and processes are increasingly complex, while customer expectations for superior service have risen dramatically. While organizations try to provide systems to help their employees perform more efficiently, the proliferation of desktop applications can sometimes do more harm than good for productivity.

To solve these challenges, employees not only require a single interface to work in, but this interface must be intelligent, guiding the employee through optimized processes that take advantage of the wealth of data available. A unified employee desktop, otherwise known as an agent desktop can provide this solution, improving efficiency, reducing errors, and creating a better customer experience.

In fact, Aberdeen Group found that companies with agent desktop optimization programs enjoy 44 percent greater customer retention rates.

Aberdeen Group, Agent Desktop Optimization: Three Strategies to Maximize Agent Productivity and Customer Experience, October 2015

An effective employee desktop is more than just a mashup of applications. Organizations must consider a number of factors to maximize the benefits, including technical integrations, process optimization, usability and personalization.

Let’s explore the top 10 best practices to take into consideration when implementing a unified employee desktop.
1. Decide Where to Start

Consolidating every single business application across all customer service processes can be a huge undertaking. Before you get started, focus on where your organization is likely to realize the biggest benefit. As you analyze your top call drivers, concentrate on the 80-20 rule. It is likely that 20 percent of your call types account for 80 percent of the effort spent by your employees, and these call drivers are where you can find the most savings.

- What contact types both occur frequently and contain inefficiencies?
- What processes do employees complain about the most?
- Where are most mistakes made?
- What transactions could be handled in a single call but are currently handed off?

Next, list out all of your back-end applications, order them from simple to complex, and note how frequently or infrequently they are used. Once you have a better understanding of your top processes and associated applications, you should be able to design an initial phase that could create a tangible benefit for your users. After the initial phase is complete, additional processes and applications can be added to the desktop.

Another important task is to set a baseline of your key metrics. Whether you are looking to improve handle time, reduce errors, increase first contact resolution or drive customer satisfaction, be sure to get a baseline of where these metrics stand before your project begins so you can accurately measure improvement.

2. Design Your Process

Now that you’ve chosen the processes to implement in your desktop, you must decide how to execute them in the most optimal way. In many cases, you may find that employees complete the same process in different ways. As you design the steps a process should follow, be sure to include the opinions of management as well as front line service representatives or agents. Their experiences can be valuable when determining the most efficient path to take. Ultimately, process design should be efficient, customer-centered, and easy to follow.

When designing processes, consider the following:

- What steps are mandatory versus optional?
- What process deviations or exceptions need to be accounted for?
- What customer information might the employee want to see at each step?
- How long should the step be expected to take?
- Which employees should be entitled to complete each step?

A desktop and process analysis tool can assist in the design process. These tools sit on an employee’s current desktop and track all activities, enabling you to gather data from a large set of employees to understand overall trends of how processes are executed.
Integration is a key step. Since each business application is different, you’ll need to use a variety of tactics to incorporate data from individual systems. Ask your IT department to determine whether there are available APIs, web services, or other integration patterns available to each application.

This is an excellent opportunity to take inventory of all your business applications and examine how well they are functioning for your employees. As you determine your integration strategy with each business application, you may choose to:

- **Wrap and Renew**: In this approach, you continue to use the application as the system of record, while displaying the data in the unified desktop. This approach is feasible for most applications. APIs can enable employees to update data over the course of a process. If the underlying application has performance or stability issues, you can also consider using a nightly batch process to update the system.

- **Retire**: You may find that an existing business application is not suited for its purpose, or you may already be planning to replace the system or consolidate its functions onto another platform. Using a single platform for commoditized applications to help reduce overhead is often a good strategy. In either case, a unified desktop project is typically a good opportunity to retire applications that no longer suit the needs of the business.

- Ideally, your employee desktop application should include its own underlying database, allowing you to:
  - Retire applications that you no longer need and store data locally.
  - Extend your customer model to include new fields.
  - Create additional functions or steps to your process, such as customer validation.
4. Use Contextual Knowledge to Maximize Value

A portion of the user interface on the employee desktop should always be devoted to knowledge. Knowledge articles are critical assets to employees, since complex products and ever-changing processes make it nearly impossible to memorize all of the relevant information. By leveraging a central knowledge base rather than asking a co-worker or referring to local notes, employees are much more likely to have access to up-to-date, accurate information.

Using contextual knowledge maximizes the value of a knowledge base. Contextual knowledge includes information from the current process, including customer products, location, issue type and process step, to automatically filter the knowledge base. Rather than spending time searching for the information needed, contextual knowledge automatically displays the articles most relevant to the current activity, reducing the amount of time employees need to search. Further, employees can insert this knowledge into a case, email or chat with one click, saving even more time.

5. Unify Customer Channels

In the world of omnichannel engagement, customer contacts are no longer limited to the phone. With email, secure messages, live chat and social media, customer issues enter the contact or service center from a variety of channels. The unified employee desktop should be the hub for contacts across all of these channels, providing a consistent experience for both customers and employees. Here are a few best practices to create a unified channel strategy:

- Handle contacts from all the channels in the same desktop. Doing so enables users to share access to common business applications and resources, such as knowledge management and case management.
- Show a unified contact history across all channels to provide employees with a complete picture of any ongoing conversations when they receive a new contact or an escalation from self-service.
- By unifying channels within the desktop, you can enable employees to gracefully switch channels as needed during an interaction. For example, if an employee is chatting with a customer and then wants to send an email or call the customer on the phone, he can maintain the context of the interaction, saving time and avoiding customer frustration.
- Distribute the right work to the right employee at the right time. With all channels sharing the same desktop, blended agents or service representatives should be able to receive work from multiple channels as needed without changing applications. However, be sure to leverage blended agents across similar digital channels, such as live chat and social media, as blending across voice and digital channels can decrease efficiency.

Inbound messages should also be routed to employees based on customer, issue type, availability and other criteria, so that each message is sent to the employee best suited to respond.
6. Determine the Fundamentals of the User Interface

A unified employee desktop is likely to help you meet your goals of efficiency and accuracy only if your employees are able to quickly and easily find the information they need, which means that your user interface decisions are critical to the success of the entire project. With access to an abundance of customer information from numerous disparate systems, creating an intuitive interface is no easy task.

While the exact data points available will vary by company and industry, organizations should aim to present some key customer data at the beginning of each interaction, including the customer contact history as well as any open issues or unusual activity. Employees should be able to launch common tasks and processes as well as view knowledge articles with a single click. Once the employee launches a specific task, the screen should be tailored to the specific process, showing only relevant information needed at that point in time.

Take advantage of usability studies from employees to highlight inefficiencies and confusing interfaces when you are mapping out the design. Always remember—user interface design should be simple and intuitive, leveraging business rules and triggers to automate as much of the task as possible and display flags to draw attention to key information.

7. Personalize to Optimize

While your organization may rely on dozens of business applications to support its customers, specialized employees are likely to use only a subset of these. The employee desktop should be optimized for each employee's role, with personalized screens highlighting key tasks and applications. Personalized screens can allow for increased or restricted access, links to different applications and processes, and preset filters. This personalization not only can improve the efficiency for each employee, but can help provide the security your customers demand.

During your planning phase, be sure to sit with employees from a variety of departments, making note of different tasks, habits, and even screen resolution and number of monitors to create a desktop solution tailored to each group.
While most organizations place a high priority on keeping their customers happy, many are also realizing the value of employee satisfaction. Engaged employees tend to be more productive and more likely to remain with the company, which can help reduce training costs. Having the right unified employee desktop approach in place can play a significant role in improving employee engagement.

Let’s explore different ways in which you can create a culture of employee engagement.

• Access to an online community presents a great opportunity for employees to collaborate with one another, seek advice and learn from each other’s experiences.

• Gamification is another mechanism to increase employee engagement. By creating games with specific themes and narratives, organizations can help change employee behavior and drive engagement while creating a fun atmosphere. Employees can compete around metrics such as first contact resolution, case closure rate, handle time and more.

Incorporating gamification into the employee desktop can enable organizations to link their performance management and other workforce optimization capabilities with the engagement management tools themselves. Combining workforce optimization, analytics and engagement management provides an opportunity to see a complete picture of how to optimize customer engagement.
9. Reduce Wrap-Up Time

Wrap-up time refers to the time after an employee finishes a contact with a customer, before receiving the next contact. During this time, employees typically annotate details from the previous interaction, such as issue type, resolution and next steps. These activities take valuable minutes out of an employee’s day, so reducing the amount of time spent here can have a significant impact on cost savings.

The employee desktop can capture every employee activity across applications over the course of an interaction. Take the insight deeper by using a case management solution within the desktop to automatically create and annotate cases while employees work.

Case management has many benefits from helping orchestrate and guide employees through processes to generating awareness around the status and next steps of an issue at any particular time. By tracking processes, steps, knowledge articles and data, the customer case can be populated without the need to manually enter information—helping to reduce resolution time.

10. Measure and Improve

Earlier, we emphasized the importance of setting a baseline for the metrics you are looking to improve through a unified desktop. It is important to continue these measurements as you roll out the desktop, to help ensure you reach your goals. As part of your desktop project, you should track a variety of metrics:

- **Operational efficiency**: Track overall handle time, wrap-up time and first contact resolution, as well as specific activities within a call to search out inefficient tasks and processes.
- **Process adherence**: Are employees following your processes as designed? Which processes are inefficient? Which processes need to be modified?
- **Operational management**: Do you have visibility into work volumes, throughput and assigned staff, allowing you to react in real time to bottlenecks, reassign staff, implement agent blending, and more?
- **Service-level agreement (SLA) monitoring**: How many of your customer issues are approaching or past their SLAs? How can you adjust or escalate work accordingly?
- **Knowledge usage**: Are employees using your knowledge base? What knowledge needs to be added or updated?
- **Ad-hoc reporting**: Can you create ad-hoc reports without IT intervention in order to view the information you need?
- **Customer Feedback**: Correlate your customer feedback with your operational measures to track what contact characteristics lead to the most successful customer outcomes.

When implemented properly, a unified employee desktop can have tremendous benefits for the quality and speed of service provided to your customers. As stated by Aberdeen Group, "Companies are reaping substantial rewards from investing in ADO (Agent Desktop Optimization) programs." The best practices outlined above may help you realize these benefits in your own organization.

* Aberdeen Group, Agent Desktop Optimization: Three Strategies to Maximize Agent Productivity and Customer Experience, October 2015
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