

# AGENT DESKTOP OPTIMIZATION: THREE STRATEGIES TO MAXIMIZE AGENT PRODUCTIVITY & CUSTOMER EXPERIENCE

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## Report Highlights

p2

**Companies with agent desktop optimization programs enjoy 44% greater customer retention rate.**

p4

**On average, agents spend 15% of their time seeking relevant data & knowledgebase articles via the agent desktop.**

p7

**100% of top-performing businesses provide agents with relevant knowledgebase articles available via the agent desktop.**

p11

**Top-performing businesses are 38% more likely to seamlessly integrate the agent desktop with enterprise systems.**

This report highlights the state of the market in how modern contact centers turn technology into an advantage by optimizing the agent desktop and seamlessly integrating it with enterprise systems such as CRM and ERP. We'll also provide numerous best practices companies should implement to maximize agent productivity and customer satisfaction.

# 2

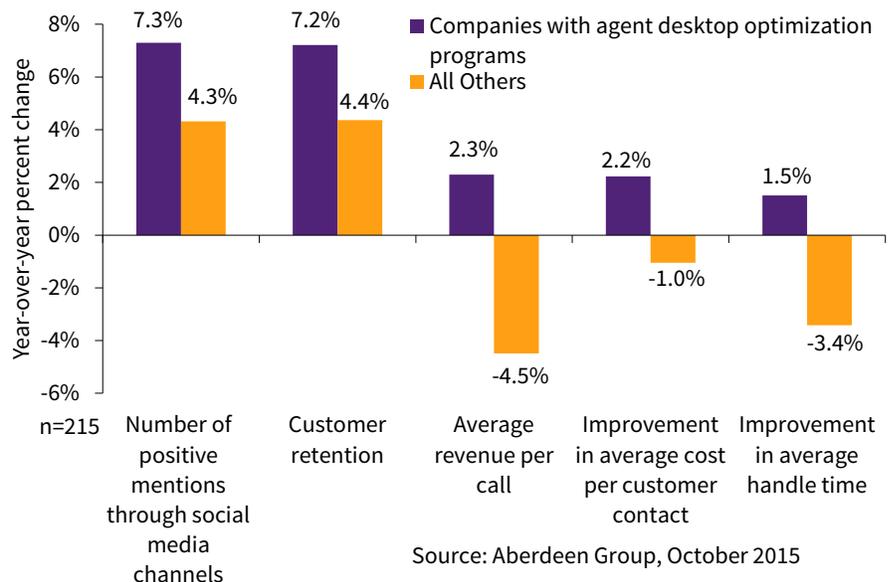
**Investment in agent desktop optimization programs increased by 62% between 2014 and 2015. Having seen its impact in improving agent productivity and driving customer satisfaction, more companies are planning to invest in this area in 2016 and beyond.**

## Why are Contact Centers Increasing Investments in Agent Desktop Optimization?

The systems companies use to manage customer interactions today are more complex than ever before. As businesses continue increasing the number of channels they use to serve buyers, the number of technology tools and processes used by contact center agents is expected to increase. To this point, Aberdeen's March 2015 *CEM Executive's Agenda 2015: Leading the Customer Journey to Success* study shows that an average business uses four channels to interact with customers, and 100% of contact centers are using multiple channels.

Lack of focus on carefully integrating technology systems and business processes used to support multi-channel customer conversations results in poor agent productivity and frustrates clients. Companies invest in agent desktop optimization (ADO) programs to mitigate these outcomes and accomplish the results depicted in Figure 1.

**Figure 1: Focus on the Agent Desktop to Create Happy Customers & Minimize Costs**



### Definition: Agent Desktop Optimization (ADO)

For the purposes of this research, Aberdeen defines ADO as a technology-driven organizational effort aimed to provide agents with a better ability to use their desktop in order to access the information needed to serve customers in a timely and personalized fashion.

# 3

As illustrated in Figure 1, organizations with a formal ADO program benefit from their investments in a number of ways. They improve customer retention rates by 44% (7.2% vs. 4.4%) and positive word-of-mouth by 70% (7.3% vs. 4.3%) more year-over-year, compared to companies without ADO programs. Furthermore, **companies without a formal program to optimize the agent desktop observe 4.5% erosion in revenue per customer contact** year-over-year, while those that do enjoy 2.3% increase. This delta of 6.8% is a rather significant opportunity to help contact centers drive incremental revenue for the business.

Focus on productivity and performance through ADO programs also helps improve (*reduce*) customer service costs by 2.2%, while companies without ADO programs experience 1.0% annual worsening (*increase*). While this 3.2% difference might appear rather small, it means that businesses can now reinvest these savings back into customer experience management (CEM) programs and justify investments in ADO programs. Indeed, trend analysis between Aberdeen's November 2014 [\*Agent Desktop Optimization: Putting Agents in Charge of the Omni-Channel Customer Experience\*](#) study and 2015 survey findings reveal that adoption of ADO programs increased by 63% between 2014 and 2015 (23% vs. 37%). This marks significant growth, and validates that companies are reaping substantial rewards from investing in ADO programs and, as a result, increasing their investments.

### *Simply Deploying Technology is not Enough to Achieve Success*

The aforementioned findings make it clear that investing in ADO programs is a wise strategy. However, it's also important to note that simply adopting an ADO program by investing in technology tools won't be enough to create a long-term competitive advantage. The use of technology is likely to create a positive

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**Companies are reaping substantial rewards from investing in ADO programs.**

**If you struggle with agent productivity and performance, and don't have your eyes on an ADO program, we highly recommend to follow suit.**

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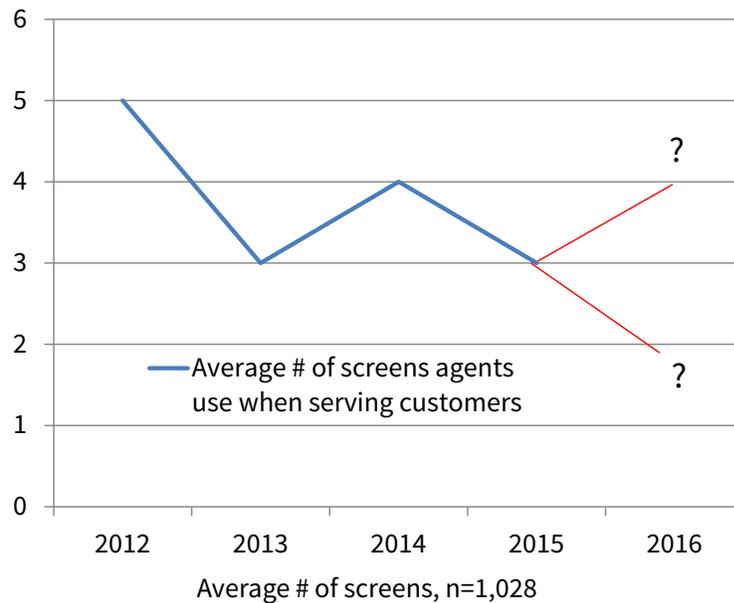
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impact in the short-term, however, the ability to maximize agent productivity and customer delight hinges on contact centers' ability to successfully build and manage an ADO program. To this point, Figure 2 shows that, despite continued increase in adoption of ADO programs, contact center agents must still use multiple screens when managing customer conversations.

We recently made investments enabling agents to access all customer data stored across disparate systems via a single screen. As a result, we saw an immediate increase in agent productivity and decrease in customer contact abandonment rate.

~General Manager of Customer Service in a Mid-Size European Utilities Firm

**Figure 2: Contact Centers are Making Strides towards a Unified Agent Desktop**



Source: Aberdeen Group, October 2015

The good news from this chart is that agents today need to use fewer screens (three) when interacting with clients, than they did in 2012 (five). When capturing this insight, we differentiated between the number of screens agents use to access relevant knowledgebase articles and the number of screens used to access customer data captured across different channels. Interestingly, the average numbers for both use cases was the same: three. Findings also revealed that using three screens to find relevant data or knowledgebase articles consumes 15% of

# 5

an agent’s time on average. Assuming an annual labor cost of \$35,000 per agent, this means that **a 300-seat contact center incurs \$1.57 million each year in unnecessary costs**, resulting from sub-par agent productivity.

## A Smart ADO Strategy Drives Top-Notch Results

We’ve observed that, despite growing adoption of ADO programs and companies decreasing the number of screens agents use as part of their activities, businesses still struggle with sub-par agent productivity. By using four key performance indicators (KPIs) to gauge organizational success in ADO, we identified a leading group of contact centers that differentiate themselves from the rest of the pack in overcoming this challenge. Table 1 illustrates the results enjoyed by these Leaders (see sidebar), in comparison to peers with lower performance (Followers).

**Table 1: Getting ADO Right Maximizes Results**

Company Performance (n=215)	Leaders	Followers
<b>Current first contact resolution rate</b>	86%	52%
<b>Current customer retention rate</b>	81%	43%
<b>Year-over-year improvement in agent utilization rate</b>	5.2%	0.9%
<b>Year-over-year improvement in average handle time</b>	2.8%	0.9%

Source: Aberdeen Group, October 2015

Leading contact centers that excel in ADO programs enjoy the fruits of their efforts. They attain 65% greater first contact resolution rates (86% vs. 52%) as well as 88% greater customer retention rate (81% vs. 43%), compared to Followers. Effective use of an agent desktop also enables Leaders to achieve far greater results across key operational metrics, such as agent utilization rates and average handle times.

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## Research Methodology

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For the purposes of this study, Aberdeen constructed the maturity class through two groups of survey respondents. Classified by their self-reported performance across the metrics depicted in Table 1, each company with an ADO program falls into one of two categories:

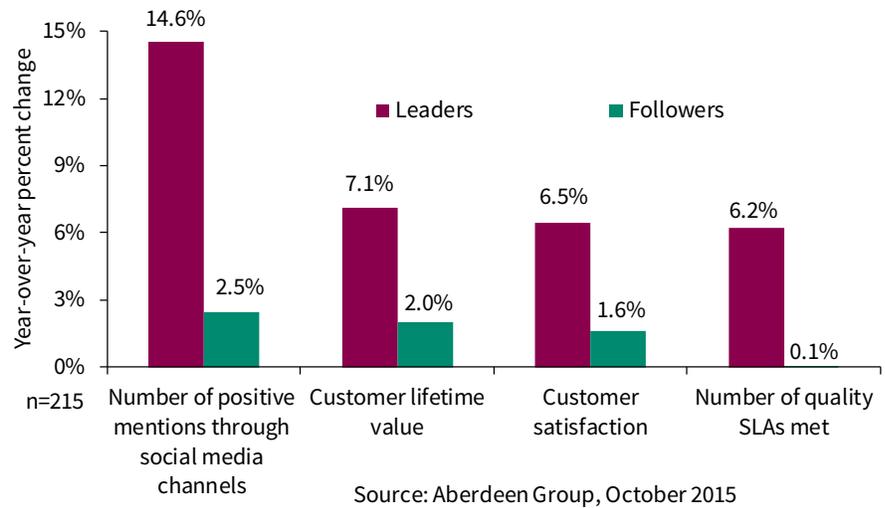
- **Leaders:** Top 30% of respondents based on performance
- **Followers:** Bottom 70% of respondents based on performance

# 6

**Enabling contact center agents with relevant insights via the agent desktop has a direct impact in creating satisfied customers as well as reducing unnecessary costs.**

The difference in performance improvements observed by the Leaders versus Followers validates that technology and process adoption alone is not enough to achieve maximum benefits from ADO programs. Companies must adopt best practices that help Leaders differentiate themselves. Adoption of these best practices is not only helpful to improve agent productivity and performance, but also to improve customer experiences – Figure 3.

**Figure 3: A Top-Notch Agent Desktop Program Holds the key to Satisfied Customers**



It’s no secret that for many contact center executives, customer experiences are directly influenced by agent activities. As such, success in enabling agents with relevant and timely insights through ADO programs translates into annual improvements in metrics, such as customer satisfaction and customer lifetime value. Also important to highlight in the above figure is the number of positive mentions through social media channels. This is a metric indicating organizational success in meeting and exceeding client needs to drive positive customer-generated social media content (e.g. Facebook posts and tweets). Similar

# 7

to the other metrics, Leaders again outpace All Others in driving annual improvements in this KPI.

## Three Steps to Maximize Agent Productivity and Ensure Customer Satisfaction

So far, we've covered why companies are investing in ADO programs, as well as the picture of success when organizations effectively launch and manage these programs. Now, let's observe three key steps contact center executives must take to join the ranks of Leaders – or remain as one – if they're already there.

### *Step 1: Provide Agents with Easy Access to Knowledgebase Articles*

What is the most common type of contact center interaction? Depending on the nature of a business, the answer might vary from addressing client support requests to collections and reminders. For most contact centers, however, addressing customer issues will be at the top of the list. The ability to accomplish this goal requires that the contact center agent is equipped with the right knowledge to handle specific issues. Leaders in ADO programs understand this and, as such, 100% of these organizations provide their agents with a centralized knowledgebase featuring articles on how to solve issues related to specific products / services — Figure 4.

→ [Read the full report, “Key Technologies to Optimize your Agent Desktop”](#)

→ [Related Research “Knowledge Management in the Contact Center: Empowered Agents Drive Customer Delight”](#)

# 8

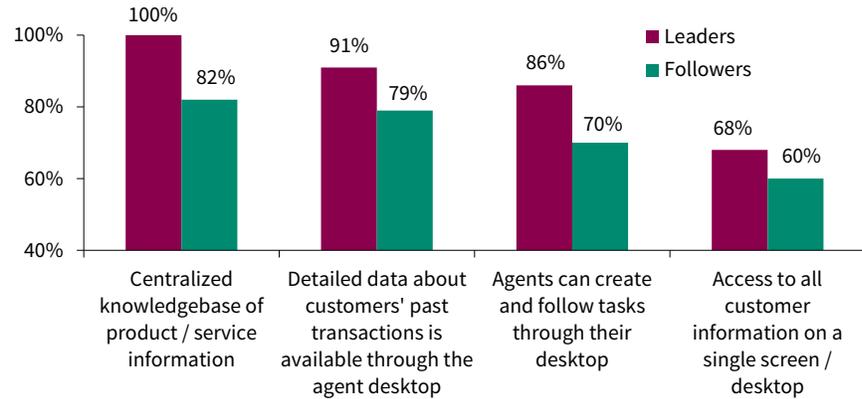
## Definition: Omni-channel Contact Center

For the purposes of this research, Aberdeen uses the term “omni-channel contact center” to define businesses that have a formal strategy in place to deliver personalized *and* consistent customer experiences across multiple channels (e.g., phone, social media, web, mobile, and email) and devices (in-store, laptop, and smartphone).

The end goal of these programs is to ensure that the context and experience from each channel and device carries over across all other touch-points to ensure consistency of conversations via multiple touch-points.

While multi-channel programs also focus on using multiple touch-points to interact with customers, by definition, they don't consider devices as a touch-point that needs to be optimized for consistency and personalization. Please read this [related blog post](#) for further insights on this topic.

**Figure 4: Enable your Knowledge Workers with... Knowledge**



Percent of respondents, n=215

Source: Aberdeen Group, October 2015

Knowledgebase articles are provided to agents via a knowledge management system. As such, it's vital that companies ensure seamless integration between the knowledge management system and agent desktop in order to enable contact center agents to easily search and access relevant articles. Please read Aberdeen's October 2015 [Knowledge Management in the Contact Center: Empowered Agents Drive Customer Delight](#) study to learn more about the business benefits and best practices in knowledge management.

### *Step 2: Provide Agents with Visibility into the Omni-Channel Customer Journey*

Although this is labeled as the second step, this activity produces best results when implemented concurrently with the first step discussed. When an agent is interacting with a customer, it's vital that the agent is able to access relevant knowledgebase articles to address client issues. However, it's equally important that the agent also has visibility into all the previous interactions of the customer across different channels. This increases the agent's ability to address client issues in a personalized fashion, while remaining consistent with the context of previous interactions.

# 9

In fact, this is the backbone of omni-channel customer care programs (see sidebar).

Aberdeen's November 2014 *Omni-Channel Contact Center: The Smarter Way to Engage Customers* study shows that companies laying the foundation to build omni-channel capabilities enjoy 24% greater year-over-year increase in annual company revenue (14.6% vs. 11.8%). They also decrease the number of customer complaints at a 55% greater pace (9.0% vs. 5.8%), while driving 41% greater customer retention rates (13.0% vs. 9.2%), compared to those that lack omni-channel capabilities.

Figure 4 above provides insights into how Leaders in ADO programs provide their agents with insights into the omni-channel customer journey. Specifically, 91% of these businesses ensure that their agents have easy access to all the historical data related to interactions with specific clients across different channels. This capability is important, as it is those insights that provide agents with visibility into the precise needs and journey of each client, and facilitate their tailoring of conversations accordingly.

Another capability deployed more widely by the Leaders versus Followers is ensuring that agents can access all the relevant customer data stored across numerous enterprise systems via a single screen. This capability is provided through unified agent desktop tools, and helps contact centers address the previously mentioned productivity issue of agents spending 15% of their time browsing through disparate systems. Considering that a 300-seat contact center incurs \$1.57 million on average due to this productivity issue, it's appropriate to indicate that providing agents with single-screen access to relevant data helps companies reduce (or fully eliminate) this cost.

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**Providing agents with seamless access to data on historical customer interactions across multiple channels is a key characteristic of leading contact centers. Lack of this capability increases the risk of delivering inconsistent messages that don't cater to the precise needs of each client.**

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Real-time visibility into agent activities and performance has been a critical enabler helping us track and improve agent experiences. This led to subsequent improvements in our customer satisfaction results.

~Customer Service Manager in a Large U.S.-based Medical Devices Firm

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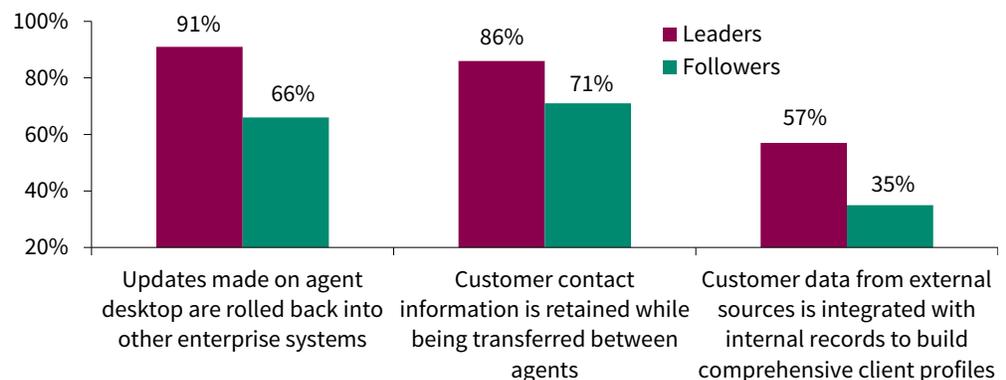
**Establishing a knowledge management system or a unified view of customer data is not a one-and-done exercise. Customer needs and problems rapidly change. As such, you must ensure that your systems keep up to deliver truly personalized interactions.**

If you aren't sure of how many screens your agents use to do their jobs or if you suffer from sub-par productivity, use of desktop analytics would help answer those questions. Desktop analytics tools help companies monitor contact center agent desktops to identify how long it takes to conduct certain tasks, ensure quality assurance, as well as gauge user experiences. Findings from use of desktop analytics are used for numerous purposes, including process redesign to ensure seamless integration across disparate systems, as well as agent coaching and training activities.

*Step 3: Always Enrich Customer Data (Profile)*

Enabling agents with relevant knowledgebase articles and customer data sets the stage for successful interactions. However, if you don't regularly keep your knowledgebase articles up-to-date with client needs as well as update account information with data on recent interactions, you run the risk of poor agent productivity and unhappy customers. Figure 5 shows that Leaders use several activities to ensure that their activities evolve in line with the changing needs and activities of their buyers.

**Figure 5: Evolve your ADO Activities with Customers**



Percent of respondents, n=215

Source: Aberdeen Group, October 2015

# 11

Let's use an example to highlight the importance of the findings depicted above. Assume that a high-spend client purchased a product in January 2015. In April 2015, the client contacted the business to seek support about an issue. In September 2015, the issue recurs, and the client uses the self-service portal to seek resolution and addresses the problem. However, when the same problem recurs in October 2015, the client contacts the business again to seek support. If activities on the agent desktop are not rolled back into the CRM to update account information after the contact in April, this would mean that the agent interacting with the client in October would have no visibility into the fact that the customer ever contacted the business with the specific issue. For a customer contacting the firm third time about the same issue, this would be a strong sign that the organization is not closely monitoring buyer needs, and might compel the company to work with another provider to meet product needs in the future.

To reduce the likelihood of the above scenario taking place, Leaders are 38% more likely to ensure that data input through the agent desktop is seamlessly integrated with other enterprise systems (91% vs. 66%). Top performers also regularly monitor external sources of customer intelligence such as client-generated social media content and online community conversations, and incorporate these insights within the current account profile. This helps them ensure developing a rich view of each account, and enables contact center agents with additional insights to truly personalize customer conversations. Leaders are 63% more likely to have this capability in place, compared to Followers.

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**Leaders in ADO programs regularly enrich customer insights with external data available through channels such as social media networks and online communities.**

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# 12

## Recommendations

Customer experience is a key differentiator determining which organizations will survive and thrive – and which will go down in the dusty pages of corporate history. Businesses are constantly on the look for the next new technology and innovative process that will give them the competitive advantage to delight clients. However, many forget that customer experiences start with employee activities. This is especially true for contact centers as agent activities often make or break customer experiences.

Despite the crucial role of employees, our research shows that contact centers are not yet fully focused on enabling their agents with the right technology tools and information to do their jobs. Indeed, only 37% of contact centers currently have an agent desktop optimization program in place. The good news, however, is that companies increasingly understand how ADO helps them maximize agent productivity and customer satisfaction, and hence increased their investments in this area by 63% between 2014 and 2015. If your company is in the process of evaluating an ADO program – or currently has one but is aiming to improve its results – we recommend following the three steps outlined in this report to ensure continuous success in empowering agents and driving superior customer experiences:

- Provide agents with easy access to knowledgebase articles
- Provide agents with visibility into omni-channel customer journey
- Always enrich customer profiles

# 13

For more information on this or other research topics, please visit [www.aberdeen.com](http://www.aberdeen.com).

## Related Research

[Employee Engagement: Paving the Way to Happy Customers](#); September 2015

[Customer Analytics: How to Make Best Use of Customer Data](#); July 2015

[Contact Center WFO: How to Balance Customer Needs with Agent Productivity](#); May 2015

[Customer Engagement: From Interactions to Relationships](#); March 2015

[Co-Browsing: Guide Customers to Grow your Own Success](#); May 2015

[Omni-Channel Contact Center: The Smarter Way to Engage Customers](#); November 2014

[Key Technologies to Optimize your Agent Desktop](#); December 2014

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