

# AGENT DESKTOP OPTIMIZATION: PUTTING AGENTS IN CHARGE OF THE OMNI-CHANNEL CUSTOMER EXPERIENCE

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## Report Highlights

**p2**

**Lack of effective technology tools is the top challenge impacting ADO programs.**

**p5**

**Leaders enjoy a 32.2% annual increase in agent utilization rate.**

**p8**

**Top performers are 23% more likely to provide agents with detailed customer insights, compared to others.**

**p10**

**Leaders are 97% more likely to guide their agents with precision insights by using customer sentiment and feedback data.**

This report will illustrate the business value of deploying agent desktop optimization (ADO) programs in enhancing agent productivity and improving the customer experience. It will also demonstrate the ways through which leading contact centers empower agents with timely and relevant insights needed to help agents do their jobs more effectively.

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The agent desktop is the gateway for organizations to truly differentiate themselves via superior customer experiences.

### Definition: Agent Desktop Optimization (ADO)

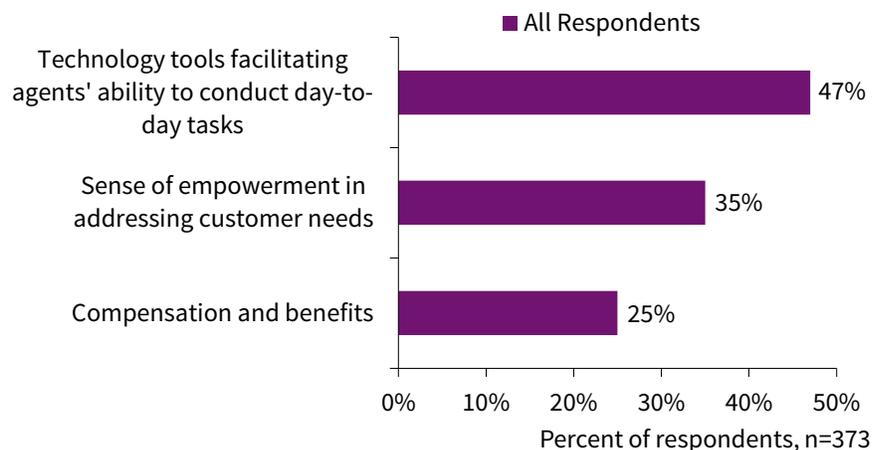
For the purposes of this research, Aberdeen defines ADO as a technology-driven organizational effort aimed to provide agents with a better ability to use their desktop in order to access the information needed to serve customers in a timely and personalized fashion.

### Agent Desktop: It's More than Just a Technology Enabler

Companies have changed the priorities of their contact center workforce optimization (WFO) programs. Aberdeen's May 2014 [\*Contact Center Workforce Optimization: Secrets to Unlock Agent Productivity & Performance\*](#) study shows that improving agent productivity and utilization is no longer the number one factor influencing contact center WFO activities. It was replaced with the goal of improving the quality of customer interactions.

This change means that the linkage between contact center agent activities and customer experience is now better understood by a wider group of organizations. An important question then that needs to be answered is whether companies are providing contact center agents with the necessary technology tools and information to delight their customers. Figure 1 answers this question by illustrating the top challenges companies within our [\*Contact Center WFO\*](#) study face when managing agent productivity and performance. It shows that the lack of effective technology tools to help agents is the most common challenge across businesses.

**Figure 1: Technology is a Key Determinant of Agent Productivity**



Source: Aberdeen Group, October 2014

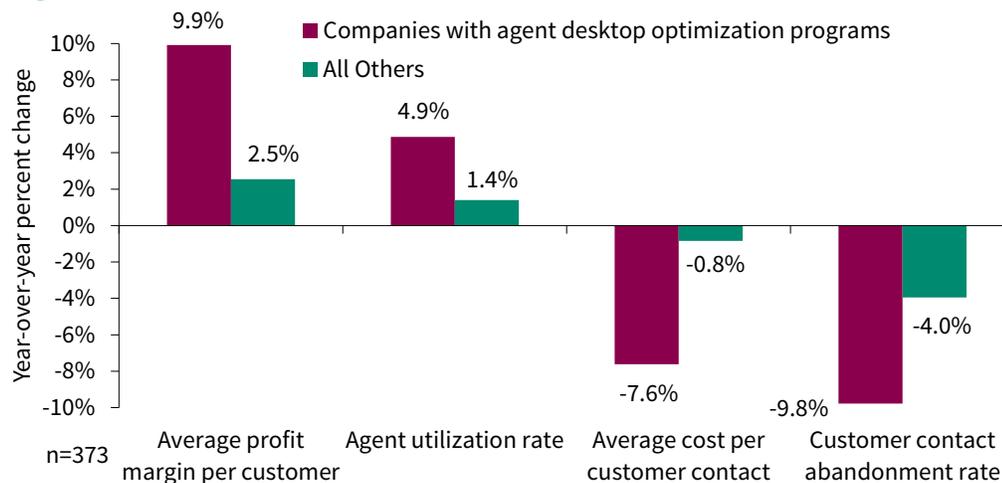
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It's important to note that the respondents who answered the aforementioned question were allowed to select multiple choices within the survey. Hence, the factors highlighted in the above figure indicate that organizations are not up against a single challenge. They face a multitude of challenges in improving the agent experience. However, the most common among these roadblocks is the ability to provide agents with technology enablers.

Agent desktop is one of these technology enablers that plays an instrumental role in helping the agents do their jobs. It does so by providing agents with access to relevant insights on historical interactions with customers, enabling the agent to query a knowledgebase to seek resolution guidelines for specific issues, as well as documenting the data captured while serving each account. Figure 2 shows that organizations that implement an ADO program are far more successful than their peers without it. This is true across a number of key areas for contact centers, including decreasing customer care costs, reducing client frustration and driving incremental revenue.

**Fourteen-percent (14%) of agent time spent looking for information across disparate systems.**

**Figure 2: ADO Increases Revenue and Reduces Costs**



Source: Aberdeen Group, October 2014

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## Research Methodology

For the purposes of this study, Aberdeen constructed the maturity class through two groups of survey respondents. Classified by their self-reported performance across several key metrics, 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

A comparison of the performance of companies with ADO programs versus All Others provides strong validation regarding the business value of launching and nurturing an ADO program. However, it is important to note that ADO programs are about more than just agent desktop management technology and tools. The term also refers to putting organizational efforts in place to facilitate an easier and more integrated use of the agent desktop, thus increasing agent productivity. Companies must complement their use of the agent desktop technology with several key activities in order to maximize the results of their ADO programs.

### *The Characteristics of Leaders in ADO*

Before we discuss the best practices that enable building and nurturing a successful ADO program, let's observe the characteristics of companies that enjoy maximum results by empowering agents with a better agent desktop.

Between March and September of 2014, Aberdeen Group surveyed 373 organizations regarding the key trends and best practices in their contact center activities. We've segmented these respondents by their current use of an ADO program and analyzed their performance across three key performance indicators (KPIs) to determine the Leaders versus Followers (see sidebar) in ADO. Table 1 illustrates these KPIs as well as the performance of Leaders versus Followers across each measure.

**Table 1: Better Use of ADO Helps Leaders Outpace Followers**

Company Performance Results (n=373)	Leaders	Followers
Current customer retention rate	92%	68%
Year-over-year average improvement (decrease) in average handle time	9.5%	-2.5%
Year-over-year average improvement in first contact resolution rate	7.5%	2.0%

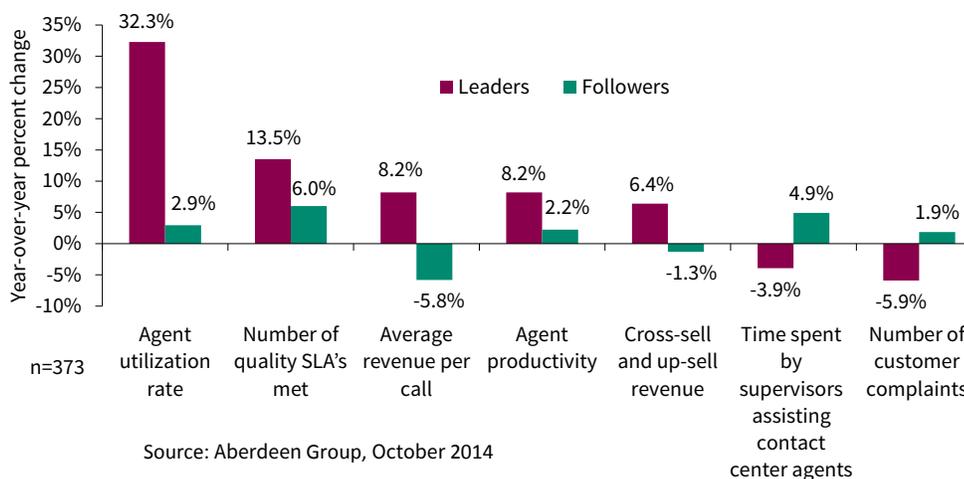
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As demonstrated within the above table, Leaders enjoy superior results across all the KPIs, compared to Followers. For example, they retain 35% more of their clients (92% vs. 68%) each year, compared to Followers – a direct validation that empowering the contact center agents with better technology tools has a direct impact in creating happy customers. Considering that our [Contact Center WFO](#) study showed us that improving the customer experience is the top objective driving contact center WFO programs, we can infer that a successful ADO program will also put companies on the right path to achieve the objectives driving their broader WFO efforts.

It's also important to highlight the operational performance differences between Leaders and Followers. The former group enjoys annual improvements in decreasing the average handle time, whereas the latter experiences lengthening in the time it takes to resolve client issues (see sidebar).

Figure 3 illustrates several additional performance measures where leading ADO users enjoy better results, compared to the Followers.

**Figure 3: Leaders Make Far Better Utilization of their Agents**



### Definition: First Contact Resolution in an Omni-Channel World

In an [omni-channel setting](#) and for the purposes of this study, Aberdeen defines 'first contact resolution' or 'FCR' as an organization's ability to solve a client's issue during the first interaction.

This interaction might take place through a single touch-point (phone,) or more often through multiple touch-points. For example, the customer might use an interactive voice response (IVR) system to help the organization identify the issue and then interact with a live agent to resolve the issue by phone.

If multiple touch-points were involved as part of the conversations to address the same issue, then these conversations would be considered as first contact and FCR would be determined by analyzing if the conversations that took place across multiple touch-points (in close periods of time) have yielded resolution of the client issue or if the customer had to contact the business multiple times to get the issue addressed.

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## Definition: Agent Utilization versus Agent Productivity

The difference between agent utilization and agent productivity is that the former refers to an organization's ability to utilize agent time on productive tasks such as serving the clients. The latter, on the other hand, refers to each agent's ability to generate the desired output (handle customer issues) during a certain interaction. Therefore, while both the agent and the organization has control on agent productivity through use of specific activities and technologies, only the business itself is able to control agent utilization rates through its scheduling activities.

The findings depicted above show that Leaders maximize the annual improvement in agent utilization rate – a metric measured by the percentage of available agent time spent on productive tasks such as serving the customers and supporting back-office tasks (see sidebar). They also grow their incremental revenue (average revenue per call) while reducing agents' reliance for supervision (time spent by supervisors assisting agents). The broad range of performance benefits outlined thus far shows that while implementing an ADO program helps companies improve their performance, companies must follow the Leaders in this area to reap maximum rewards.

Now let's now observe the key activities that help these leading businesses improve and maintain their performance at superior levels.

### How to Build a Leading ADO Program

On a high-level, the core capabilities that differentiate Leaders are: visibility, empowerment and guidance.

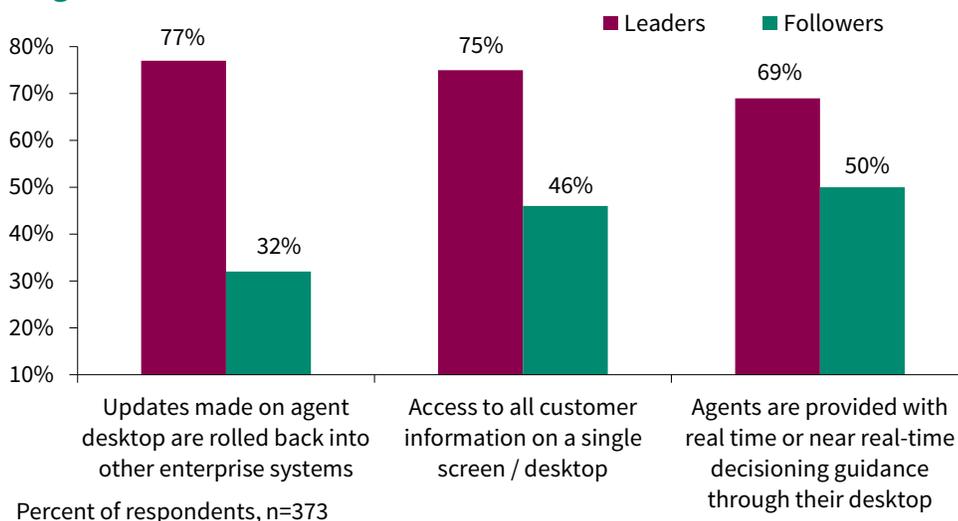
**Visibility:** This refers to providing agents easy and timely access to customer and operational data stored across multiple enterprise systems. The individual systems that agents need to access will vary based on numerous factors (e.g. type of interaction). Examples of these systems include customer relationship management (CRM), enterprise resource planning (ERP), order management and automated contact distribution (ACD).

Data shows that on average, **an agent uses four different applications during each interaction** to access the relevant data needed to serve customers. Respondents within our [Contact Center WFO](#) study indicated that this corresponds to **14% of agent time spent looking for information across disparate systems.**

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Aberdeen's September 2014 [Streamlining the Agent Experience Reduces Unnecessary Costs](#) study shows that a contact center where agents spend 14% of their time seeking relevant insights incurs approximately \$840,000 in unnecessary expenses each year. (Please see the [study](#) for further insights related to our analysis.) The good news is that contact centers have the ability to reduce this unnecessary cost. Leaders alleviate this challenge by utilizing the activities illustrated in Figure 4.

**Figure 4: Leaders Make All the Relevant Data Available via a Single Screen**



Source: Aberdeen Group. October 2014

Providing agents with the ability to access all the relevant data via a single screen is an important differentiator of Leaders – one that they are 63% more likely (75% vs. 46%) to have, compared to Followers. This capability is provided by first determining the enterprise systems agents need to use to serve clients, and working with the IT team to ensure that data flows seamlessly across these systems. It's also important to ensure that the agent desktop technology tools used by the business support such integration with disparate enterprise systems. Once the foundation for this capability is established, it also allows

### Agent Guidance via Analytics

Research shows that Leaders are 38% more likely (69% vs. 50%) than Followers to provide agents with real-time or near real-time decision guidance via the agent desktop. This helps agents with additional support aimed to address client issues in an accurate and timely fashion.

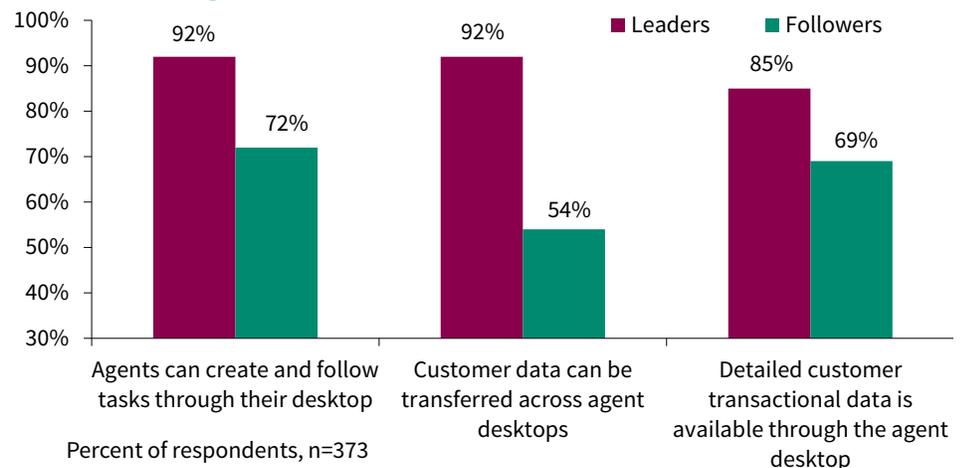
Companies deliver decision guidance by utilizing a set of different technologies, including real-time analytics, business intelligence, desktop analytics and speech analytics.

For example, use of speech analytics helps the organization analyze the audio data of the customer and agent conversation and provide agents with decision guidance through the agent desktop in the form of screen pops. Read Aberdeen's October 2014 [The Business Value of Speech Analytics: How to Fund and Maximize the Value of Speech Analytics](#) study to learn how companies conduct such analysis.

pushing updates made on the agent desktop to other enterprise systems. Enabling such two-way information flow provides all the stakeholders within the business with a more timely and relevant view of the customer interactions. This enables stakeholders in different parts of the business (e.g. contact center, sales, marketing or back-office) ensure consistent client messaging – see a [related blog post](#) on the importance of this activity.

**Empowerment:** In addition to making it easier for agents to access relevant data, companies must also empower their agents with capabilities that help them make better use of the insights gleaned across different enterprise systems. (It's important to note that this statement holds true when organizations put relevant insights in the hands of agents who know how to utilize this data to solve customer issues.) Figure 5 demonstrates several activities Leaders utilize to empower their agents with relevant insights to facilitate delivery of more personalized and timely interactions.

**Figure 5: Top Performers Provide Agents with Detailed Customer Insights**



Source: Aberdeen Group, October 2014

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Most important of all is to ensure that agents not only use a single screen to access all the relevant data, but that the data provides detailed insights to all the client interactions taking place across multiple touch-points. Examples of these insights include previous customer contact, prior purchases, and recent self-service transactional data. Providing agents with relevant insights is important, as the lack of such a broad view of the [customer journey](#) will likely result in the agent asking questions to capture information provided within earlier touch-points, thus increasing the risk of frustrating the client. Establishing a unified view of the [omni-channel customer journey](#) via the agent desktop requires firms to regularly work with the IT team to ensure monitoring of data flows across systems that capture and store data across different touch-points (e.g. phone, web self-service and social media). Leaders are 23% more likely (85% vs. 69%) than Followers to have this capability in place.

Also important in empowering the agents with necessary capabilities is streamlining case and task management activities. This means that agents are able to create and assign tasks in order to ensure that customer issues are resolved in a timely manner – a key activity that impacts metrics such as customer satisfaction, as well as number of quality service-level agreements (SLAs) met. Several task management capabilities are also utilized as part of case management activities, thus collectively, they help in ensuring that service delivery activities are executed in a seamless manner.

**Guidance:** After providing timely visibility to relevant data and empowering agents with key capabilities to manage omni-channel interactions, companies must also provide guidance for issue resolution in order to achieve superior results. To this point, Figure 6 shows that top performers are 34% more likely (82% vs. 61%) to provide their agents with a centralized

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knowledgebase of product / service information, compared to Followers. This capability allows agents to use a single system to query different issues, and provides playbooks for issue resolution via the articles within the knowledgebase. Companies must regularly monitor client issues and ensure that the knowledgebase articles are addressing emerging issues in order to ensure continuous success through this activity. Otherwise, they run the risk of providing agents with a technology enabler that doesn't address the agent needs, and in turn, doesn't resolve client issues.

**Figure 6: Knowledge Management is a Key Enabler for the Leaders**



Leaders are 97% more likely (73% vs. 37%) to have a dedicated process to guide interactions with unsatisfied clients, compared to Followers. They do so by monitoring and capturing customer feedback and sentiment across different touch-points. Once they determine a negative feedback or sentiment, they provide relevant agents with timely automated alerts regarding the unsatisfied customer. This provides agents with the necessary insights to re-engage the unsatisfied customer with the goal of resolving their issue and retaining their business (or re-winning, if the account ceased doing business with the organization). Read Aberdeen's April 2014 [Voice of the Customer: Big Data as a Strategic Advantage](#) report to learn about the ways companies collect and utilize customer feedback and sentiment data.

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## *Don't Forget Technology*

We've covered the three building blocks (visibility, empowerment and guidance) that help Leaders maximize their performance within ADO programs. While these activities are crucial, the other important ingredient companies should also incorporate within their ADO programs is the use of the right technology enablers. Read our October 2014 [\*Key Technologies to Optimize your Agent Desktop\*](#) study to learn which technology tools Leaders use more widely than the Followers as well as how they benefit from these technologies.

## Recommendations

Agents are your gateway to success in creating happy and loyal customers. Therefore, it is imperative that enabling your agents to do their jobs better is the first step to establishing a top-notch CEM program. Considering that agents spend 14% of their time looking for data across different enterprise systems during each client interaction, we can state that access to effective technology tools has a direct impact on agent productivity and performance.

The use of ADO programs is a critical step to help companies overcome challenges in managing their agent experiences. However, simply adopting a new agent desktop management technology or enhancing the capabilities of the existing one will not yield maximum results. Companies must incorporate the below strategies as part of their ADO programs to reap maximum benefits when empowering their contact center agents.

- ➔ **Enable your agents to access all the relevant data via a single screen.** Using an average of five different applications to access relevant data during each interaction means that companies are not making effective use of their agent resources. If agents in your

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organization need to navigate through multiple screens to access different applications this means that you have further room in reducing your customer care costs by decreasing the unnecessary time your agents spend on such unproductive tasks. Work with your IT team to first integrate your disparate data systems, and leverage the technology integration capabilities (e.g. [contact center and CRM integration](#)) provided by most agent desktop tools to place crucial insights at your agents' fingertips.

- **Don't overlook the importance of streamlining the execution of core activities.** Capabilities such as task management and case management might appear as simple (and obvious) elements that any company would incorporate as part of their agent desktop tools. However, becoming a Leader is not about having certain technology capabilities available – it's about putting them into use effectively. If you're not regularly assessing your use of ADO capabilities such as case management and task management, start gathering feedback from your employees on the improvements they would recommend in these areas that would allow them to do their jobs better. Also, use technology tools such as desktop analytics to monitor how agents use their desktop to track how agents utilize core capabilities. This will help you identify areas where agents might need training and coaching to make better use of the capabilities provided via the agent desktop.

**Guide your agents to the finish line (and beyond).** Joining the ranks of Leaders and maintaining this status requires companies to go beyond providing agents with necessary technology and process capabilities to better do their jobs. Businesses looking to enhance agent productivity and performance must also closely track agent activities by monitoring the agent desktop to provide

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real-time guidance to solve client issues – an activity supported by use of technology tools such as speech analytics and desktop analytics. This must also be complemented with agent training programs where the insights captured by the use of analytical tools that monitor agent and customer conversations are utilized to build tailored training programs aimed at improving agent knowledge and skills in the areas needed. This will ultimately help in empowering the agents to succeed in their job: delighting clients.

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For more information on agent desktop optimization and other contact center and customer experience metrics, visit [http://aberdeen.com/\\_aberdeen/contact-center/CMAV/practice.aspx](http://aberdeen.com/_aberdeen/contact-center/CMAV/practice.aspx).

## Related Research

*[Contact Center Workforce Optimization: Secrets to Unlock Agent Productivity & Performance](#)*; May 2014

*[Enterprise Social Collaboration in Customer Service: Better Teamwork Unlocks Customer Delight](#)*; January 2014

*[Streamlining the Agent Experience Reduces Unnecessary Costs](#)*; March 2014

*[Advanced Case Management: Empower the Knowledge Worker](#)*; October 2013

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