



## Brief: Retool For A New Workforce Reality — New Technology For A New Breed Of Agent

Agent Tools Must Provide Process Guidance And Predictive Data

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### WHY READ THIS BRIEF

A new generation of contact center agents has begun to vex application development and delivery (AD&D) professionals. The new agents seem reluctant to learn detailed product and service information that previous cohorts of agents had little problem with. These new agents prefer to learn where to find such information, but have little intention of actually memorizing product support details. This report details why current tools fit these new agents as poorly as a cheap off-the-rack suit and what AD&D pros should look for in future tools to empower these agents to deliver outstanding customer experiences.

### MORE COMPLEX INTERACTIONS DRIVE CONTACT CENTER CHANGES

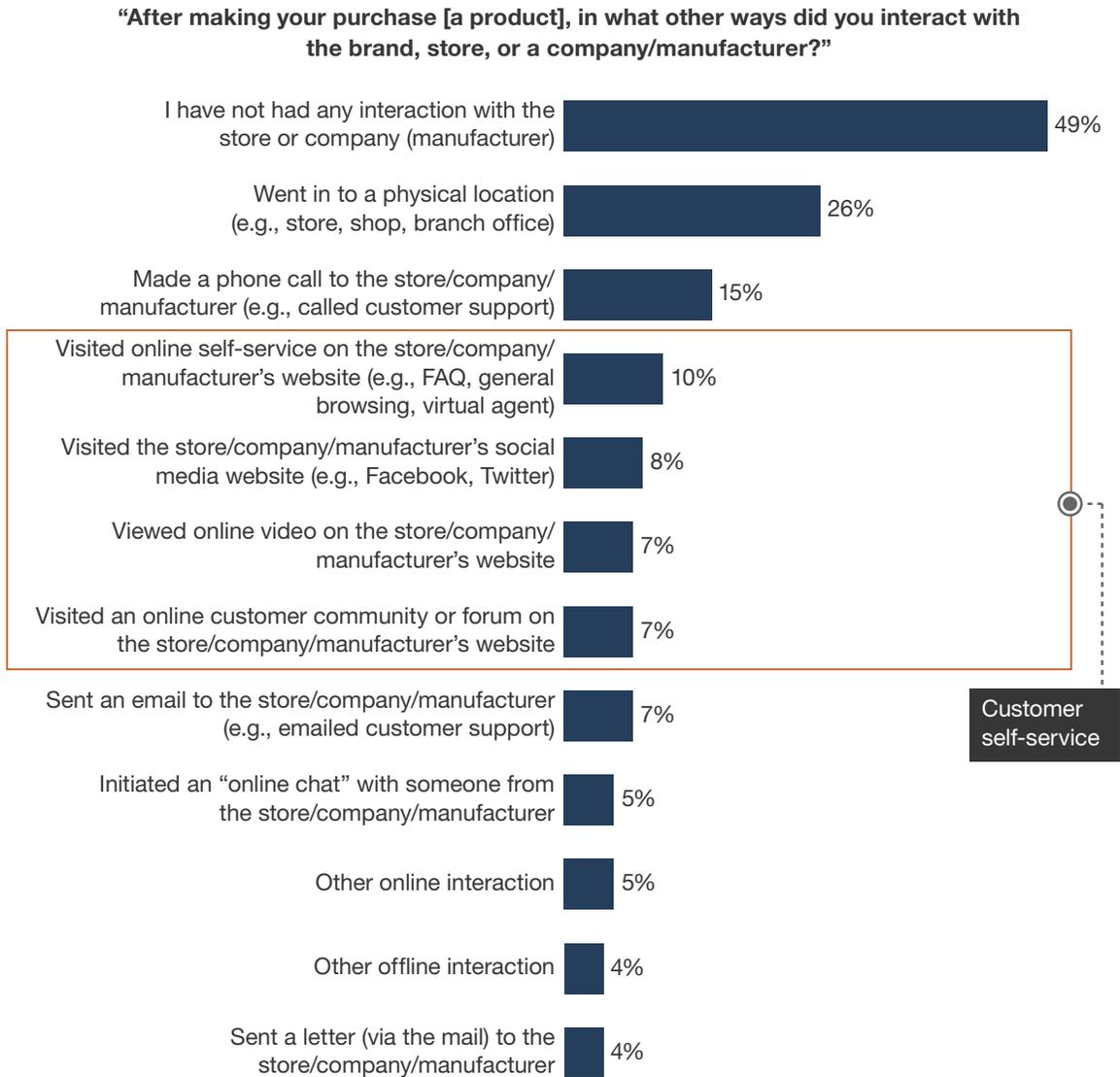
As the number and quality of customer self-service options have multiplied, consumers have increasingly turned to self-service to find product information and to receive customer service from brands (see Figure 1). In fact, 76% of US online consumers use web self-service knowledge to find answers to their questions.<sup>1</sup> Because self-service tools best handle simpler queries and service requests, contact center agents now field fewer of these more straightforward inquiries and regularly see more complex requests. Additionally, more complex issues frequently contain multiple threads or sub-issues and these issues are, therefore, harder to automate.



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**Figure 1** Customers Use Multiple Self-Service Options For Customer Support



Base: 4,396 US online adults (18+) who purchased a product in the past 3 months

Source: Forrester’s North American Consumer Technographics Customer Life Cycle Survey 1, 2014

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### Not Your Father’s Contact Center Agent

We’ve all seen these changes happening in our own lives: We find it harder to get through an entire book, or read an entire long article online without clicking over to another browser tab, or go 17 seconds without checking email or social networks on our mobile devices. Like the rest of us, contact center agents think and behave differently today than they did just a few years ago.

The best contact center agents used to become walking libraries of knowledge, mastering both domain knowledge about the products and services they supported and knowledge of the tools and processes used in their jobs. But agents have changed. “Today’s agents are predisposed to searching for the solution over and over again. They don’t directly retain specific content anymore, instead they are more focused on the method to find the content,” according to Rienzi Ramirez, chief delivery officer, Philippines at [24]7 who manages several thousand contact center agents. This new focus on repeatedly finding information rather than learning it can be attributed to:

- **Demographic changes.** Firms typically pay low wages for contact center work. Contact center managers often find that younger people are the only workers willing to work for these wages. But unlike many other classes of knowledge workers, agents almost never have the freedom to self-provision their own technology, creating a disconnect between the types of modern, social, and predictive tools they would like to use and what AD&D pros provide them.<sup>2</sup> For a generation used to the help of both virtual assistants such as Apple’s Siri and friends via social networks, this can cause both employee frustration and suboptimal customer experiences.
- **Neuroplasticity.** Neuroplasticity describes the capacity of neurons and neural networks in the brain to change their connections and behavior in response to new information, sensory stimulation, or damage.<sup>3</sup> However, according to a team of neurologists from Harvard Medical School, “Plastic changes may not necessarily represent a behavioral gain. Plasticity is the mechanism for development and learning, as much as a cause of pathology.”<sup>4</sup> Repeated actions create more connections between neurons, strengthening the pathways, while disuse weakens those pathways.

Despite what frustrated consumers may feel during a bad customer experience with a contact center, the agents in those centers are actually human and, therefore, prone to neuroplastic changes. Agents are better equipped to search for information. Repeated use of search engines and virtual assistants has strengthened the neural pathways associated with information search. At the same time, knowledge workers have seen a weakening of neural pathways that allow them to deeply engage with complex information.

## THE NEW BREED OF AGENT REQUIRES GUIDED AND PREDICTIVE TOOLS

Contact center jobs have never been easy. Agents also deal with complex processes, minimal levels of empowerment, little room for career advancement, and angry customers. Application development and delivery (AD&D) pros have to arm this agent workforce with the technology to serve an ever more demanding customer base. To complicate matters, AD&D pros have begun to note a change in their contact center agents since newer agents do not learn or work the way older agents did. Contact center trainers struggle with lower knowledge retention rates among new agents.

To help this new strain of agent provide outstanding customer experiences, AD&D pros need to reevaluate their agent-facing tools. The tools that contact center agents use are often outdated, as only 33% of business and technology decision-makers make improving the experience of interacting with a contact center agent a major objective of their customer experience efforts.<sup>5</sup> Agents come to work accustomed to touchscreens, but contact center management sits them down in front of archaic green screens.

Although not widely deployed yet, more agent-friendly technologies have entered the scene. Attempting to incorporate automated assistance and reflecting popular consumer-grade technologies, many of these tools allow new variety of agent to work in the ways in which they are most comfortable, without sacrificing customer experience. The new tools provide:

- **Process guidance.** To deal with complex support, tools can now lead agents through the service process step-by-step. Tools can either provide simplified guidance that ensures agents do not miss any step or locked-down guidance that mandates steps agents cannot skip. San Francisco's 311 contact center turned to simplified guidance to help improve the procedure for getting homeless citizens into emergency shelters. AD&D leaders there created an executable file that opens up a browser with multiple pre-populated tabs containing information agents need for either gathering or presenting data, in the order the topics typically arise.
- **Process simplification.** Process simplification aims to break complex processes down into discrete steps, and provide help for agents at each step, especially important for infrequently accessed processes. Enterprise search vendor Coveo, for example, has built its knowledge system so that as soon as an agent opens up a service case in Salesforce, the system understands what the case is about and determines which knowledge workers in the organization could help with that case. The system then presents those contacts to the agent without the agent ever searching for anything.
- **Predictive and actionable information.** Predictive tools understand real-time text or real-time speech and interject recommendations based on this real-time dialogue. Salmat, a contact center outsourcer in Australia, uses contextual knowledge in its Kana agent desktop to decrease agent training time and drive better first contact resolution rates. As agents fill in fields in the service case form, a knowledge bar on the side of the desktop updates on-the-fly, providing new, relevant knowledge articles that can help the agent better serve the customer.
- **A consumer look and feel.** Enterprise employees feel that consumerization of the technology they use in a work environment is now an imperative.<sup>6</sup> But as contact center agents tend to be younger than typical enterprise employees, providing a consumer feel to technology becomes even more critical to making the agents successful. Customer engagement technology vendor and contact center outsourcer, [24]7, for example, does its agent recruiting via Facebook and has built social collaboration spaces into its chat tools.

## New Functionality On The Horizon

Over the next two or three major product release cycles — approximately three to five years — many vendors will remake contact center tools with the new breed of agent in mind. In particular, there are three important categories of tools that will begin to incorporate richer process guidance and predictive features, including:

- **Knowledge management.** While several vendors in this space have already baked predictive, context-driven engines into their tools, over the coming three years these features will become standard for most knowledge management products.
- **Agent desktops.** The goal of these tools used to be the centralization of all the possible applications agents might need to get their jobs done. During the next three years, however, many desktops will incorporate process simplification by exposing or hiding functionality based on context; process guidance within that context; and a more social network-like look and feel.
- **Contact center search.** Contact center pros already want more than simple contact center search that focuses on just aggregating, searching, and analyzing data across multiple channels. Vendors in this space are working toward tools that understand the context of what the agent is trying to accomplish and automatically surface relevant information without requiring the agent to actively search for anything. Despite advancements in this space, because of the complexity of interactions agents face, this new breed of search tools may not mature for quite some time.

Several traditional contact center infrastructure and applications providers, including Genesys, Unify, and Aspect, have already invested heavily in updating their products with more modern, consumer-grade user interfaces (UIs). More than just a flashy visual refresh, these updates align the UIs with the expectations of younger agents accustomed to the look and feel of modern social networking sites and mobile applications. Over the next several years, expect to see more contact center technology vendors turning to outside product strategy and design houses to help bring the interfaces of their tools into the modern age.

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### WHAT IT MEANS

#### NEW AGENTS NECESSITATE NEW CRITERIA FOR TOOLS ASSESSMENT

Forrester expects contact center tools — including advanced contact center search, knowledge management, digital customer interaction tools (e.g., chat, email response, and social customer service), and most importantly agent desktop tools — to eventually incorporate process guidance, predictive features and increasingly consumer-feeling user interfaces. But in the near-term, AD&D pros will need to design a customized and prioritized checklist of criteria to use when evaluating agent-facing tools, weighing the value of technology alignment with older agents and that with the new breed. Many of the features designed to match the way these new agents work will appear only on vendors' road maps. AD&D pros, therefore, need to judge the depth of each vendor's commitment to refashioning their products for this modern demographic.

## SUPPLEMENTAL MATERIAL

### Survey Methodology

For Forrester's Business Technographics® Global Priorities And Journey Survey, 2014, Forrester conducted an online survey fielded in January through April 2014 of 13,822 business and technology decision-makers located in Australia, Brazil, Canada, China, France, Germany, India, New Zealand, the UK, and the US from companies with 2 or more employees.

Each calendar year, Forrester's Business Technographics fields business-to-business technology studies in 10 countries spanning North America, Latin America, Europe, and Asia Pacific. For quality control, we carefully screen respondents according to job title and function. Forrester's Business Technographics ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of business and technology products and services. Additionally, we set quotas for company size (number of employees) and industry as a means of controlling the data distribution and establishing alignment with IT spend calculated by Forrester analysts. Business Technographics uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

For Forrester's North American Technographics® Customer Life Cycle Survey, Q4 2013, Forrester conducted an online survey fielded in November 2013 of 4,541 US individuals ages 18 to 88. For results based on a randomly chosen sample of this size, there is 95% confidence that the results have a statistical precision of plus or minus 1.5% of what they would be if the entire population of US online adults (defined as those online weekly or more often) had been surveyed. Forrester weighted the data by age, gender, income, broadband adoption, and region to demographically represent the adult US online population. The survey sample size, when weighted, was 4,532. (Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in online panels.) Please note that respondents who participate in online surveys generally have more experience with the Internet and feel more comfortable transacting online.

### Companies Interviewed For This Brief

[24]7	Salmat
Coveo Solutions	San Francisco 311
OpenSpan	Toister Performance Solutions

## ENDNOTES

- <sup>1</sup> Forrester asked US online consumers what communication channels they had used to receive customer service in the past 12 months. Source: Forrester's North American Consumer Technographics® Customer Experience Survey, 2014.
  - <sup>2</sup> For more on the relationship between employee engagement and the technology provided to employees by technology management, see the July 30, 2013, "[Benchmarking Technology's Effect On Employee Engagement](#)" report.
  - <sup>3</sup> Source: Britannica Online (<http://www.britannica.com/EBchecked/topic/410552/neuroplasticity>).
  - <sup>4</sup> Source: Alvaro Pascual-Leone, Amir Amedi, Felipe Fregni, and Lotfi B. Merabet, "The Plastic Human Brain Cortex," Annual Review of Neuroscience, July 2005 (<http://www.annualreviews.org/doi/abs/10.1146/annurev.neuro.27.070203.144216>).
- For summaries of similar neurological and psychological research, read Nicholas Carr, *The Shallows: What The Internet Is Doing To Our Brains*, W.W. Norton & Company, 2011 and Maggie Jackson and Bill McKibben, *Distracted: The Erosion of Attention and the Coming Dark Age*, Prometheus Books, 2009.
- <sup>5</sup> Source: Forrester's Business Technographics® Global Priorities And Journey Survey, 2014.
  - <sup>6</sup> For a deeper dive into the implications of end user computing in enterprises, see the May 10, 2013, "[Create A Habitat Of Technology Engagement And Enablement For Your Workforce](#)" report.

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