5 Ways to Optimize Your Workforce for Customer Contact in a Social Marketplace

Gaining visibility, discipline and control at every customer touch point

How do organizations compete in the social media saturated, mobile marketplace? The challenge is to interact with customers more flexibly and efficiently while still delighting them with a consistent quality experience. This is no easy task when customers control the conversation, and are more demanding, more vocal, and less tolerant than ever before. Contact centers must be prepared to adapt and respond to today’s customers and meet their demands, or risk losing them forever.

A holistic customer contact solution that informs customer interaction management with workforce optimization (WFO) enables organizations to step up to this challenge. WFO encompasses technologies and business practices that focus enterprise resources and efforts on customer contact. Organizations rely on WFO to plan, execute, measure and continuously improve customer engagement regardless of where or how customer interactions are done.

Workforce optimization capabilities increase visibility into customer interactions and provide process discipline and control across all customer touch points – from a phone call between a customer and an agent, an exchange via social media, or a mortgage processed by a loan specialist. For example, voice and screen recordings, speech and desktop analytics, social monitoring and performance management capture, consolidate and translate voice of the customer and agent performance into meaningful metrics. This insight automates and guides smarter operational decisions that are grounded in meaningful KPIs (key performance indicators). At the same time, powerful resource planning and demand forecasting capabilities allow contact center managers to plan for the relationship revolution and turn plans into schedules that maximize customer outcomes and minimize labor costs.

This white paper discusses how workforce, quality and performance management capabilities provide practical business processes and tools for effective staffing, monitoring, reporting, evaluation and coaching. The essential benefits are greater operational productivity and efficiency, an empowering environment for employees and a routinely positive customer experience. WFO is essential for continually improving the people and processes that drive next-generation customer contact and delivering on the most rigorous expectations of today’s consumer.

1—Create a Collaborative Contact Center Environment.

Gone are the days of agents poring over spreadsheets, searching through contact directories, developing impromptu lists and writing Post-It® note reminders, and then manually dialing for available help. Enterprise technologies such as Unified Communication and Collaboration (UCC) – when applied to workforce optimization – can bridge the gaps between people across multiple communication channels – within the contact center and beyond.

The ability for an agent to tap into their team, their management, and the broader enterprise with a single click saves time, effort and guesswork and enables them to resolve customer issues much faster. By leveraging collaboration software like Microsoft Lync and Microsoft SharePoint, contact centers can seamlessly link all knowledge workers – in the front office, the back office, within the broader enterprise and even outside the walls of the enterprise itself – to find the right answer quickly and turn a customer issue into an opportunity to grow customer value consistently.

1 CedarCrestone 2010 -2011 HR Systems Survey, 13th Annual Edition
2 Next-Generation Contact Center, Forrester, October 2012
Precise and Productive Knowledge Sharing

An Internet search for “what happened to customer service” returns well over 90-100 million results with links to page after page populated with rants about unmet expectations. How do organizations deliver faster, better service and minimize the rants? Ask-an-expert capabilities allow agents to connect directly with their peers, supervisors, experts, back office staff or partners outside the enterprise to resolve customer issues more quickly and effectively. Users can take advantage of features like rich presence to collaborate in real time through voice, instant messaging (IM) or desktop sharing sessions.

Consider a scenario where a customer is finalizing a decision about a new car purchase and wants specific information about gas mileage. In a typical contact center, she might:

• Search the automaker’s customer web portal without finding the exact data she needs
• Click to initiate a chat session with a contact center agent
• Clarify her interests via chat while the agent searches the company knowledge base
• Hear from the agent that he found the desired stats but wants to confirm they are up-to-date
• Wait for the agent to call her back with a confirmation

Inside a next-generation contact center, the same agent can quickly see that an expert is available, bring them into the conversation either directly or virtually, and resolve the issue within a single interaction. In one session, the customer receives the information she needs and experiences a higher service level than she expected.

2—Formalize and Automate an Escalation Policy.

The integration of workforce optimization with an omni-channel customer interaction management solution makes it possible to automate escalation policies that solve the most pressing customer issues. With sophisticated forecasting and scheduling capabilities – that can take into account insight into customer issue and agent skill – workforce management ensures that the right resource is available. The integration between interaction management and WFO makes it possible for a routing strategy to take into account the insight that workforce optimization surfaces – performance, quality, availability, skill – and combine it with insight into the customer – issue type, customer value, churn potential. For example, a high value customer identified as someone likely to defect can be matched to a high-touch specialist with a stellar quality and performance record specifically trained in customer retention strategies. This specialist may be located anywhere in the world – or may be sitting in their home office – or may be a resource on a specialized outsource group. The ability to implement these kinds of escalation policies – and to automate them -- is additional insurance against the risk of inefficient processes or subpar results when dealing ad hoc with challenging customer dilemmas.

Cultivating Customer Experience Experts

Sophisticated workforce optimization technologies allow organizations to:

• Continually monitor performance to ensure they provide the customer with the optimal quantity and the best quality of information
• Record and evaluate interactions to identify best practices and address opportunities for improvement
• Align and automate coaching and performance correction with multi-dimensional KPIs
• Match a customer to the resource best able to meet their need

Two fundamentals work together to drive an effective escalation policy. First, contact centers should establish best practices and identify those agents who routinely exhibit those best practices. Second, organizations need to forecast for disruptive issues and align schedules to ensure experts are available when they are most likely to be needed. This approach takes full advantage of quality monitoring and performance management as part of the scheduling process – enabled by the full integration between workforce optimization components.

“Adoption of workforce optimization technologies and underlying processes is the new leading practice.”3

Flexible escalation policies ensure that customers are receiving the optimal level of service and that the unique skills within your resource pool are leveraged. The payoffs can include exceptionally efficient first call resolution and dedicated brand advocacy.

Digging Deeper into the Consumer Mindset

Advanced analytics can unlock consumer insight from all interactions:

• Monitor issues and sentiment across the social media landscape
• Unlock the insight trapped in voice recordings
• Synthesize interaction intelligence with customer insight from CRM systems
• Capture customer opinion using post-interaction surveys

3 CedarCrestone 2010-2011 Survey
3—Capture the Total Customer Experience and Cultivate Continuous Operational Improvement.

A simple service level score on an inbound call in the contact center barely begins to tap the wealth of consumer sentiment or satisfaction data available today. Workforce optimization interaction analytics can provide a composite view of the total customer experience and detailed insights into consumer behavior by monitoring, capturing and measuring information across both traditional and newer Web 2.0 channels.

More channels can mean more insights into consumer behavior, motivation and sentiment. Voice, email and IM/chat offer new avenues for gathering customer intelligence. When organizations also capture what customers are saying in the social sphere – on Twitter, communities, or product forums – they can achieve a more robust view of customer opinion and customer issues. By bringing together data captured in the course of interactions, with the data stored in enterprise environments such as CRM (Customer Relationship Management) systems, contact centers can begin to understand how customer experience translates to customer behavior and construct clearer, more actionable customer profiles.

Methods for Gathering Cross-channel Data

Organizations need to free customer data from silos by collecting and consolidating information from every interaction at every customer touch point. Through WFO quality monitoring capabilities, they can record and analyze customer interactions that take place both inside and outside the enterprise. The recordings can be made such that the relevant data is captured, while data subject to privacy regulations is kept just that – private.

Speech analytics can unlock the insight within the recordings and automatically surface customer opinion, emerging issues as well as agent behavior such as procedural compliance, empathy, and knowledge. These recordings are a rich source of insight into how interactions are executed.

Risk Reduction in a Regulated Environment

When workforce behaviors and business processes are subject to regulatory rules and policies, workforce optimization can bring added benefits. Automated reporting and analysis capabilities improve visibility into customer interactions and equip organizations to stand up to external scrutiny. They can quickly respond to changing regulations and implement the right controls to ensure compliance and avoid costly penalties.

Customer measured quality is another important source of insight. Customer measured quality is most often captured through structured surveys that correspond to interactions. These surveys ensure that the voice of the customer is always part of the equation.

For example, managers often use what speech analytics has uncovered – along with corresponding agent performance and customer survey data – to identify best practices, protect against risk, find opportunities for improvement, or set multi-dimensional KPIs that track not just efficiency – but also effectiveness.

While surfacing insight through reports and dashboards – to all stakeholders – is valuable and an important capability for any workforce optimization solution, the ability to infuse insight into operational workflows is what differentiates a next-generation customer contact center. Informing workflows with analytics in real time enhances decision-making acumen and cultivates continuous operational improvement aligned with business goals for next-generation enterprise performance.

Have a Plan for Success

Align your total workforce to meet the demands of the relationship revolution:

- Take the changing nature of the tasks your staff is performing and the variability of deadlines for each new task into account
- Ensure your scheduling fits the need of your increasingly remote, dispersed and home-based workforce
- Capitalize on the unique skills of each worker and schedule to promote natural learning opportunities
- Don’t treat coaching as an event – integrate just in time coaching into your daily adjustments automatically

4—Schedule the Best Possible Combination of Agents, Back Office Staff and Experts Across All Channels to Deliver the Most Helpful Customer Experience with Every Interaction.

A centralized and comprehensive approach to staffing is the key to planning and budgeting for the right number of agents, back office staff and experts with the right skills at the right time. Workforce management applications simplify and enhance this process with advanced forecasting and scheduling tools. With flexible staffing capabilities, organizations are able to factor critical variables and cover a full range of possibilities. Predictive modeling creates powerful “what if” scenarios that help guide decisions when scheduling resources on the fly. These insights also inform in-the-moment schedule adjustments to sudden changes in resource demand during key events, such as an unexpected influx of social media interactions.

One challenge of balancing staff with transaction needs is the variation in response times for different types of work. For instance, common tasks such as taking a phone call, answering an email, processing a claim, or fulfilling an order are all vital and all different. Each has a unique skill requirement, a different expectation of completion, and some tasks may span days or even weeks. With this variety, solving for an optimal resource mix on a daily, weekly, monthly, or yearly
Motivate and Empower Customer Experience Contributors to Deliver Their Best Performance.

Creating the right human environment for next-generation customer contact helps to keep human resources focused intently on the customer. Performance management helps to identify the best customer contact resources through insights into the customer experience and agent performance. When companies continually engage these employees through learning and coaching, they can maintain a workforce that performs consistently to set standards and is motivated and empowered to raise service levels.

For example, in a collections environment, fair debt laws and regulations might require companies to provide training to support compliance. If a back office worker’s interaction with a customer strays from established policies, quality monitoring and performance management tools can:

- Trigger an automated coaching session after interaction monitoring identifies a knowledge deficit
- Record and report conversations or actions for later review by the employee and supervisor, and provide the opportunity to discuss the recorded interaction with a supervisor for developmental feedback

Coaching, performance feedback and training helps the back office employee to perform above thresholds and the company to avoid fines, lawsuits and other consequences of non-compliance. These capabilities also ensure that customer-facing agents are equipped to deliver the optimal customer experience each and every time.

Managing Agent Performance through Coaching

What is the best way to empower contact center agents to manage and improve their performance?

- Focus the front and back office staff on high-value key performance indicators (KPIs)
- Enable performance and quality insight with scorecards
- Initiate automated alerts and coaching to identify and bridge skill and knowledge gaps
- Provide targeted guidance to support improved agent and customer satisfaction

Scheduling agents and experts to engage with consumers through social media can help companies participate in discussions that impact their brands and mitigate issues identified by monitoring. When agents and experts transparently engage customers through social media, they are able to take advantage of timely opportunities to retain, regain or reinforce loyalty. By ensuring that resources are on hand to manage the customer experience in this realm, organizations are better prepared to adapt to changing conditions and to secure their customers’—and their own—best interests.

Establishing a Proactive Social Media Presence

Today’s consumers are realizing the power of social media when they want the attention of companies they do business with. From a YouTube video created by a disgruntled customer and viewed by more than a million people in four days, to a bad product rating on a review site that might be available to consumers indefinitely, companies are taking notice. Interacting effectively with consumers in the social media domain requires dedicated planning and processes.

“With social networking, collaboration is greater resulting in lower costs and the organization is able to be more agile and responsive.”

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Next-generation performance and quality management technologies nurture customer-savvy agents. Through proactive best practices, agents become more competent and confident. Integrating customer satisfaction data with agent performance metrics helps identify and address issues before they impact the bottom line. Informing agent scripts with customer insights ensures that agents are prepared to treat each customer as unique and communications are productive and satisfying on both sides of the interaction.
Conclusion

In today's socially wired – and wireless – world, organizations that cultivate mutually beneficial relationships with consumers create more service, sales and marketing opportunities. A customer contact solution that tightly links omni-channel customer interaction management and workforce optimization empowers companies with visibility, discipline and control at all customer touch points – inside and outside the contact center.

Through the lens of a unified, multichannel, 360-degree view of customer engagement all facets of the customer experience come into sharper focus and reveal new opportunities to influence better outcomes. Workforce, quality and performance management capabilities enable continuous improvement of operational and employee performance through analytics and reporting, strategic staffing, evaluation and coaching, and business process automation. At the same time, they bring the added benefits of managed participation in the social sphere.

As next-generation customer contact empowers a wider pool of individuals to strengthen the customer experience – in the contact center, the larger enterprise, with federated partners and in the social sphere – companies stand to gain a stronger voice, reputation and competitive advantage in the Consumer 2.0-dominated marketplace.

About Aspect

Aspect is the only software company with a fully-integrated interaction and workforce optimization platform for enterprise contact centers globally that need to profitably (and seamlessly) orchestrate people, processes and touch points in an era when the contact center is the new center of the customer experience. For more information, visit www.aspect.com.