

From Chaos to Connection: Reimagining the Agent Desktop

JULY 29



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agenda

- Why Agents are Key to Exceptional Service
- Top Challenges and Industry Shifts
- Redefining the Agent Experience

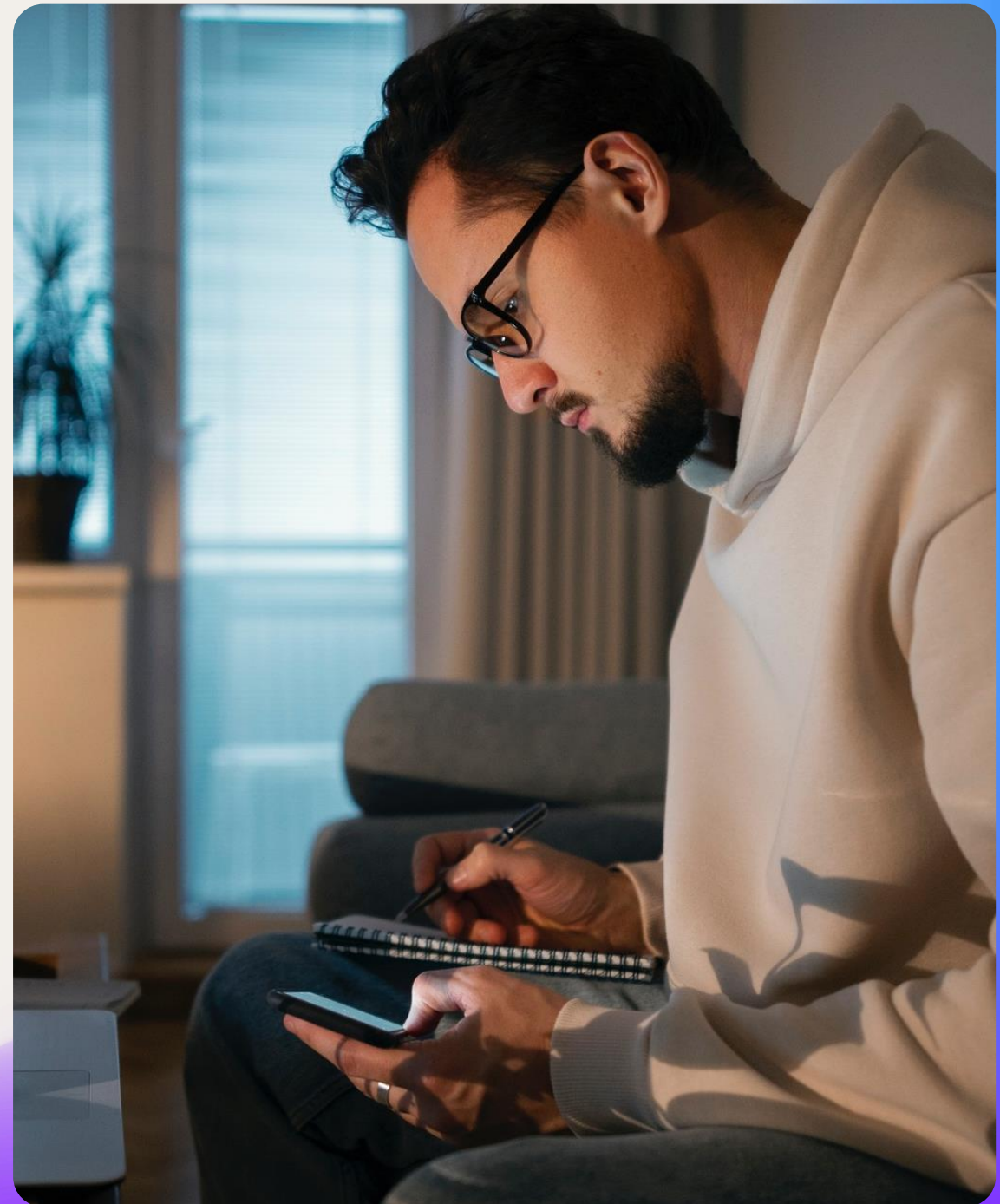
Poll question

What is the true role of agents during customer conversations?



Poll question

What are the main roadblocks agents face when trying to provide great service?



The Role of the Agent in Delivering Great Service



Customer service excellence starts with **the agent experience**



Poor technology prevents agents from focusing on conversations



How many organizations **tailor the agent desktop** to support their agents?

The Role of the Agent in Delivering Great Service



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39%

How many organizations **tailor the agent desktop** to support their agents?

What Gets in the Way of a Great Conversation?

1

No view into prior interactions or history

2

Repetitive customer authentication

3

Poor voice/non-voice integration

4

No handoff or assist workflows

5

No visibility into issue status

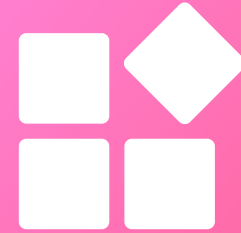
Why Do Agents Struggle to Focus?



Disjointed tools and
excessive compliance
demands



Lack of system context
or unified customer
view



Enterprise UX often
lags behind consumer
tools

Common But Flawed Solutions



CRM used as agent desktop – not built for this



Systems of record repurposed for engagement



Collaboration tools (Outlook, Teams) used for issue routing

Fragmentation Prevents Automation and Scale



CRM \neq system of engagement



Disconnected tools block AI initiatives



59% of firms say customer identity varies by channel

Forrester, 2021

The Engagement Shift in the Market



Market moving toward systems of engagement, not systems of record



Driven by CCaaS/CRM consolidation and AI adoption

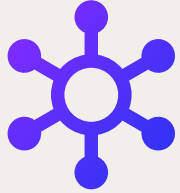


Need to automate for efficiency and personalize for CX



77% say integration between CRM and Contact Center is challenging
Forrester, 2021

The Agent Desktop as a System of Engagement



Integrates channels, data, workflow, and guidance



Enables real-time context and scripted support



Improves both agent and customer experience

Forrester, 2021

Beyond CRM, CCaaS, or Ticketing Alone



Unified experience layer, not tool sprawl



Purpose-built for conversation, collaboration, orchestration



Reduces support and upgrade burden

Forrester, 2021

Best Practices for a Successful Agent Experience

1

Observe agents in action

2

Map friction and complexity

3

Estimate the cost of inefficiency

4

Identify tech and process gaps

5

Define a modernization pilot

Reimagine the Experience



**Better CX
starts with
better tools**

**CRMs were
not built for
contact center
agents**

**Shift to systems
designed for
engagement**

Let's Continue the Conversation

- **Questions & discussion**
- **Ask us about
diagnostics, pilots, or
modernization plans**

Thank You