

# From Chaos to Connection: Reimagining the Agent Desktop

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# agenting

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

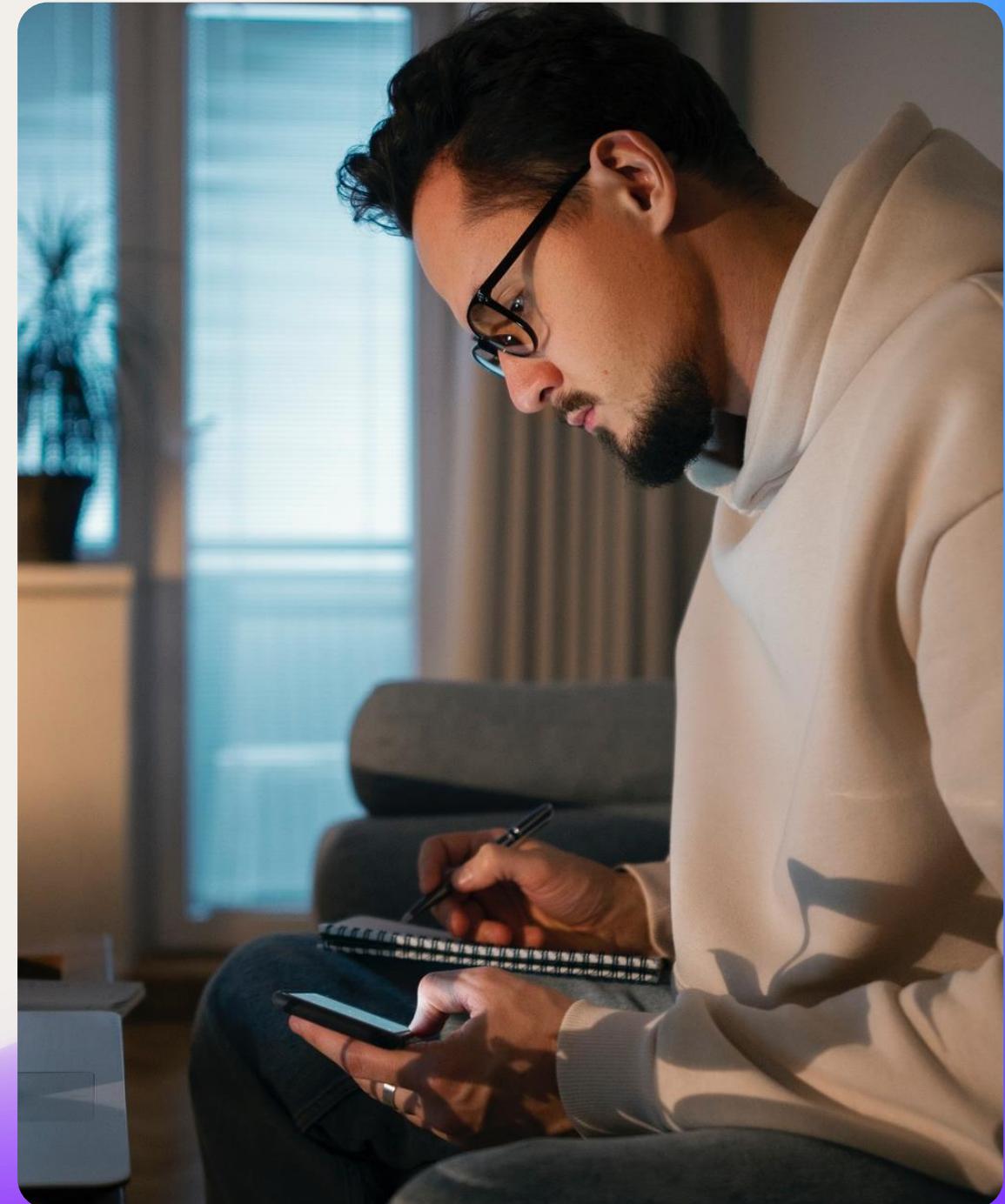
Poll question

**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



Customer service excellence starts with  
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**Poor technology** prevents agents from  
focusing on conversations

**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**

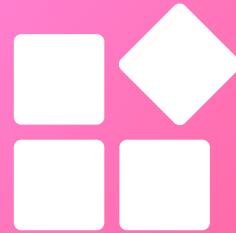
# Why Do Agents Struggle to Focus?



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

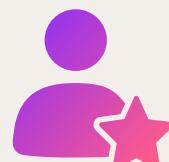
# Fragmentation Prevents Automation and Scale



CRM ≠ 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

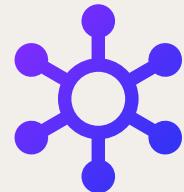


Need to automate for efficiency and personalize for CX



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