



What is the consequence of increasing self-service and voice automation for the role of the agent in terms of experience, responsibility and accountability?

A paper for CCA Industry Council

accenture

 cm insight

GALLUP

 intersperience

CCA INDUSTRY COUNCIL

CCA Industry Council drives the industry’s research agenda by interacting to ensure research approach, debate and output provides the pathway for the future in terms of new thinking and strategies from across all sectors.

An initial meeting was held where 30 leading players from industry debated ‘Changing the Rules’. From this debate it is clear a need has been established to create ‘Beyond Operational Efficiency’ – a new vision for how customer contact centres should be repositioned within organisation, placing the customer at the heart of the business.

Industry Council consists of an exclusive group of representatives from leading organisations who are committed to providing this input whilst themselves benefiting from a unique package of leading edge research, networking, government influencing opportunities and profile within industry as ‘Leaders of the Future’.

Expert academic and private sector facilitators will draw on leading edge debate and invite participation from other recognised research houses and agencies to engage with Industry Council to ensure the group deliver leading edge analysis.

As the independent professional body, CCA partner with leading organisations and groups to access relevant research and information for the development of the Industry Council. CCA’s vision is for contact centres to be repositioned within organisations to reflect the increasing complexity and competitor challenges arising from the dominance of this channel.

CCA are indebted to the efforts of the Foundation Partner Group who have formed the backbone of activity in taking forward the development of the CCA Standard[®] and creating the vision for CCA Industry Council. These organisations across all sectors, both public and private, each have a significant impact on the contact centre market-place.

FOUNDATION PARTNERS



Foreword from Rob Pike, Chair of CCA Industry Council



What is the consequence of increasing self-service and voice automation for the role of the agent, in terms of the agent's experience, responsibility and accountability?

In previous papers we have identified an emerging 'channel shift', with a move towards automation in some organisations.

Consequently the traditional role of the agent is changing. A growing proportion of the agent's calls will become more complex and require better technical and emotional intelligence skills. Agents are also beginning to work with more varied communication channels such as IM, e-mail, SMS, web chat and workflow imaging practices.

Recruitment, development and training have always been vital to the industry. So to have system complexities, as contact centres have emerged to handle the majority of many organisations' interactions with customers – be it sales, service or the provision of public services. In meeting the challenges of complexity, what tools and support for agents will be needed?

The fifth in a series of research reports exploring the changing face of customer contact, this paper discusses how the future of the agent will evolve. The ensuing debate at the quarterly Industry Council meeting focused around the demand to improve skills while creating a working environment that is rewarding for the employee. The ultimate goal, of course, is raising customer service standards while managing efficiency and effectiveness.

Once again we are indebted to the work of CCA Foundation Partners who have been the catalyst of CCA's evolution to become the Customer Contact Association. Their dedication has helped create CCA's Industry Council, a unique think-tank which is challenged with finding solutions to ensure that the customer is placed at the heart of an organisation's operations.

We would like to extend our grateful thanks to CCA's Research Council for again providing very insightful findings into this critical issue.

Rob Pike
Chair, CCA Industry Council

Rob is Director of Operations, Ulster Bank Group and European Consumer Finance at the Royal Bank of Scotland

Introduction

If simple and repetitive calls migrate to self service and voice automation, what will happen to the role of the agent over the next five years, in terms of their experience, responsibility and accountability? This was the question explored in this month's quarterly Industry Council report.

We have received excellent papers from Accenture, CM Insight, Gallup, Intersperience and Search Consultancy Ltd which make key points about the future role of the agent in contact centres.

There is mixed feedback as a result the changes in contact centres. The effective use of self service has resulted in some businesses reducing their call volumes by as much as 40%. The reduction in calls means organisations have fewer opportunities to build relationships. For other organisations, emerging channels do not mean much change. Many contact centres are set to continue as before. Still 1/3 of the population does not use the internet and may be uncomfortable with automated services.

However, the effective use of self service has meant some organisations need agents to be better at handling customers than ever before. The industry will have to motivate and inspire a new generation of agents with the ability to handle complex calls, provide consultative advice and manage complex interactions and relationships. The papers provide operational advice on how to recruit better agents, develop their capability and equip them to provide great service. With or without organisations' encouragement, there is the growing trend of confident consumers using IM, Web-chat, E-mail and SMS interactions. These channels require agents with adequate written communication and software application and database skills of which there are shortages in the recruitment market at current remuneration levels.

Agents are needed to be experts in different products, both sales and service, as well as alternative customer segments. Some telephone agents are consultative problem solvers offering options-based advice, making subtle judgements about customer needs and preferences. The ability to manage emotional exchanges sensitively and respond in ways that instil or restore customer confidence is yet another part of the portfolio of prerequisite skills for an agent.

With more engaged and confident end consumers, often with sophisticated knowledge of products and services, the multi-skilled agent needs to be supported by the organisation's systems and applications. This may involve ensuring the marketing, HR, production, IT, legal services are better designed to aid the agent in their quest to satisfy the customer.

Analysis of customers' reactions to organisations are varied and complex. Influencers of their response to organisations may be their immediate context including their personal sense of time pressure, their location, previous experience with the organisation, mood and so on. Measuring agent's success with traditional command and control metrics and CRM analytics, does not always support the agent's emotional connection and engagement with the customer.

There is a major challenge ahead to provide a stimulating work environment for people who have a wider range of employment opportunities. Multi-skilled agents, who may have better educational qualifications, excellent communication skills, requisite languages and software skills may well be de-motivated more easily by traditional call centre operational practices. New incentives to motivate the new style agent are required. Incentives could include increased financial rewards and long term career progression, prestigious training programmes (focusing on strategic and operational business issues), team working opportunities and senior management feedback on their contribution to the overall organisational objectives.

With the increased number of touch points, customers' interactions with an organisation will become increasingly dispersed forcing customer service organisations to get much better at collecting and sharing information across multiple channels. In addition agents will need to become much better at using this information in order to deliver a truly "needs" based service. Every agent is an excellent source of qualitative and quantitative market research. Agents able to apply business relevant insight and judgement to the analysis of their conversations with customers will be seen as key organisational assets. Agents may be rewarded for customer intelligence, from the various communication channels employed, and empowered to disseminating it to other parts of the organisation to drive change in the customers' interest.

The research papers provide many valuable suggestions of how to recruit, train, manage, empower agents as well as build systems and processes to capture customer intelligence. In summary, there are huge implications for the role of the agent when increasing self service and voice automation. At present organisations are experiencing a shortage of agents as the reputation of contact centres is often questioned, both as providers of service and sources of employment. Due to the complexity of the changing communication channels many organisations have successfully segmented their contact centres and in doing so have remodelled, re-launched and updated or lost the name "contact centre". Twenty years on it is the right time to rebrand, restructure and revise the performance metrics of the traditional contact centre in order for organisations to embrace the changes the new communication channels bring and support the talented agents who must rise to meet the effusive customer challenge.

'Future Agent: Role changes require new management approaches'

A white paper prepared by Marcus Hickman, Executive Research Director, CCA

As the newly appointed Executive Research Director at CCA, I met with the directors of Search Consultancy Ltd to understand, from their experience, what the implications are for the role of the agent in terms of automation and increased self-service. Our discussions led them to reflect on current trends in the contact centre recruitment market as well as assumed future influences from technology and operational needs.

What are the changing needs for contact centre agents?

The demand for agents from clients has been changing in a number of ways over the last two years. Underpinning these changes is a renewed focus on agent retention. As organisations have strived to raise service, the need to improve training, people development and provide on-going job satisfaction has also risen. Organisational HR development strategies are challenged to meet these needs.

The key changes in the role of the agent over the last two years include:

- **Aiming for ‘One and Done’**
The need to improve operational efficiency and provide a straightforward service for customers, means agents are required to improve skills to handle a wider range of tasks. Additionally, while ‘One and Done’ is great for effectiveness, automation may mean fewer voice to voice interactions and therefore fewer opportunities to impress customers and communicate brand values. While some of these skills can be trained-in, and others enabled by systems, it is desirable to recruit people with the right attitudes.
- **Multi-skilling grows**
The trend towards multi-skilled agents is a clear outcome of the on-going need to manage costs and improve performance. Also related to the ‘one and done’ imperative, agents are needed to be experts in different products, both sales and service, as well as alternative customer segments. If multi-skilling extends to moving ‘service’ based agents into pure sales functions, then issues around retention are commonplace. However, multi-skilling can also help with personal and professional development and lead to greater agent longevity - if supported by good systems.

- **IM, Web-chat, E-mail and SMS interactions rise**

Linked to multi-skilling is the growing requirement for agents to handle new communication channels – not only the phone. Here the shortage of people with adequate written communication and software skills is beginning to prove problematic. For example, agents will need to operate more applications and interpret different databases quickly and intelligently to meet customer requirements. Clients are developing service standards in these emerging channels and as they do so, recruitment requirements are becoming more specific and complex.

Multi-lingual needs

The opportunities to provide service to a wider range of people both within the UK and globally, leads to a trend to recruit team members with good language skills. Asian language skills are in demand as location becomes less important in service delivery.

Overall, the demand for agents is evolving towards more highly skilled and capable candidates. To some extent this may also be due to the growth in automation – be it IVR, web or natural language – currently this is a minor influence which will grow in the future. With a more engaged and confident end consumer, often with better knowledge of products and services, there is a requirement for higher level conversations. These will be supported by systems and applications, but require emotional connection and engagement from agent to customer.

Availability of people for emerging contact centre agent roles

Depending on the overall business strategy, agents in the future will need to be even more engaged with customers. Organisations are often defined by their HR strategies, and effectiveness and efficiency are measured by a range of indicators: staff turnover, absenteeism, personnel expenses, capacity utilisation and financial and service goals achieved. As the role of contact centre agents diversify in the future the HR strategy will need to change fundamentally.

New management models

Management practices in contact centres will continue to develop, moving away from simple “command and control”. While future agents may fall short of becoming the ‘Knowledge Workers’ that Peter Drucker has discussed, more mainstream ‘white collar’ working practices will become the norm. Involving less direct management and measurement, focusing on outcomes and agreed targets will

become more necessary to recruit and retain skilled agents. More direct linkages to customer satisfaction measures will be required. Part of the management challenge will be to provide a stimulating work environment to people who have a wider range of employment opportunities and may well get de-motivated more easily by traditional call centre operational practices.

Remuneration: more of the same?

With remuneration accounting for around 60% of total cost, increasing salaries and benefits is likely to be a challenge. However, requirements for people with higher educational qualifications, languages and software skills mean it is necessary. Already there is a wide disparity in salary ranges for Team Leaders who will play a key role in advancing leadership with centres. The challenges in the future mean their roles will develop further, in terms of skills and leadership required. Emphasis on performance appraisals and money incentives are likely to be an outcome.

Training and Manpower Planning

A question remaining is the extent to which training and short term manpower planning can compensate for recruitment of people with skill shortfalls. Some element of re-branding contact centres may be necessary to appeal to candidates who might previously regard the work as either 'stop-gap' or short term. HR strategy may emphasise the importance of customer experience, or including the role as part of a normal 'white-collar' career progression which may help to improve its attractiveness. Greater use of learning suites and online training modules will reduce costs and compliment face to face learning. Growth in regulation, product and service complexity mean that many training programmes are becoming longer and more complex.

Recruitment

In terms of recruitment, accessing new markets – such as those available through home shoring – may become more important. Additionally, gaining access to a more mature workforce may help in both meeting customer segment demands but also through higher skill and education levels. To some extent, 'lip-service' has been paid to recruiting mature people, or those returning to work, as the focus remains on a young workforce. But these people's skills and attitudes may provide solutions to changing needs for agents.

Conclusion

Emerging needs for agents does not mean complete change. Many contact centres are set to continue as before: think of the 1/3rd of the population who do not use the internet and may be uncomfortable with other automated services. Significant numbers of transactions for many organisations - for example the public sector - may continue as before. It could lead to hybrid contact centres - split between basic and higher level interactions. But for many, customer experience will become more complex and emotional and the agent of the future will be a very different role from today: contact centre management will need to continue to develop to meet the challenges of the future.

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Cost: Members - £150
Non-Members - £200



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