



**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<sup>®</sup> 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.

## 'Managing the Effects of Self-Service'

Prepared by Accenture



The age old adage used to be that you could train your agents on 20% of the content and they would be able to handle 80% of the calls. But the landscape is changing - the predictable, repeatable calls that used to make up the majority of interactions can now being handled through self-service. So what does this mean for our traditional agent?

Whilst some might optimistically predict that the life of a contact centre agent is going to get a lot easier with customers better equipped to help themselves, the reality is likely to be very different:

- Although call volumes may decrease, the calls received will be much more complex meaning that **agents will need to be better at handling calls** than ever before. The pressure on agents to perform will be even more acute as customer service organisations increase their focus on experience ahead of efficiency metrics
- As customers are given more ways to interact with an organisation, **agents will need to get much better at helping customers to help themselves**
- With an increased number of touch points, customer's 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 must become much better at using this information** in order to deliver a truly "needs" based service.

The purpose of this paper is to explore each of these areas in more detail, offering assistance to those customer service organisations that are looking to harness and work effectively alongside the rapid growth of customer self-service.

## Recruit and Develop Better Agents

The effective use of self-service has helped some businesses reduce their call volumes by as much as 40%. However, a number have started to realise that this success has also made it more difficult for them to develop and improve their relationship with their customers:

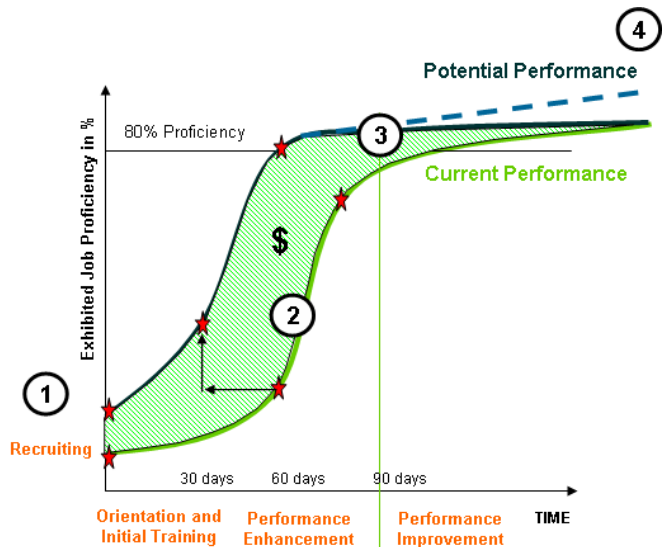
- Agents have fewer opportunities to impress and...
- An increased likelihood of disappointing their customers

This is because not only are there fewer calls but they are also more complex as the simpler interactions are dealt with through self-service. To further compound this trend, agents can no longer just deal with a call efficiently in order to impress, instead they must deliver an excellent experience for the customer. In this environment, contact centres will need better agents, a goal that is attainable through targeted interventions at key points along the agent workforce life cycle:

**1. Recruit agents that are better behaved**

Contact centres that recruit for behavioural fit based on a match against the profile of their “best agent” find that successful candidates are not only less likely to leave within 6 months but also are naturally better disposed to delivering a great customer experience. In addition, contact centres should:

- Involve the hiring Team Leader in the interview process
- Conduct a competency based interview, include a practical assessment (e.g. a practice call) and ensure that all interviewers have received dedicated training on conducting a good interview
- Measure the success of the recruitment process based on new hire attrition and performance and not on simply meeting recruitment targets



**2. Develop capability, not just knowledge and skills**

Agents that jump on the phones with a collection of disparate knowledge and skills struggle to pull them together when dealing with a real customer. In comparison, agents that have developed real capability during their initial training through a combination of scenario-based teaching, experiential learning and self-paced integration are in a much better position to deliver better customer service from “day 1”:

- Capitalise on the advantages of eLearning by giving agents the opportunity to apply their skills using web-based performance simulations
- Dedicate time between training modules and after standard training is complete for agents to practice applying what they have learned e.g. Top 10 Call Sessions where groups of three role play handling calls as observers, callers and agents
- Introduce a formal self-paced integration period as part of the induction training where new agents receive additional performance support until they have passed a set of readiness criteria

**3. Equip agents to provide great service**

It is becoming an increasingly common occurrence for customers to talk to good agents that are let down by a combination of poor tools, poor processes and a “command and control” culture. These barriers to delivering great customer service must be removed if agents are going to stand a chance of making the most of every call. Agents must:

- Be able to quickly navigate intuitive transactional systems that only ask for required data

- Never need to apologise for poor processes or procedures
- Be empowered to do what it takes to help the customer. Agents will occasionally make mistakes. However, they will learn from them if Team Leaders are on hand to monitor and help improve their performance.

The most effective way of quickly identifying these barriers is by asking your agents. Simple mechanisms such as “Diary Rooms” and Innovation Grapevines help to capture agent ideas and to engage and involve them in the activity of continuous improvement.

#### 4. Reward and recognise the rights things

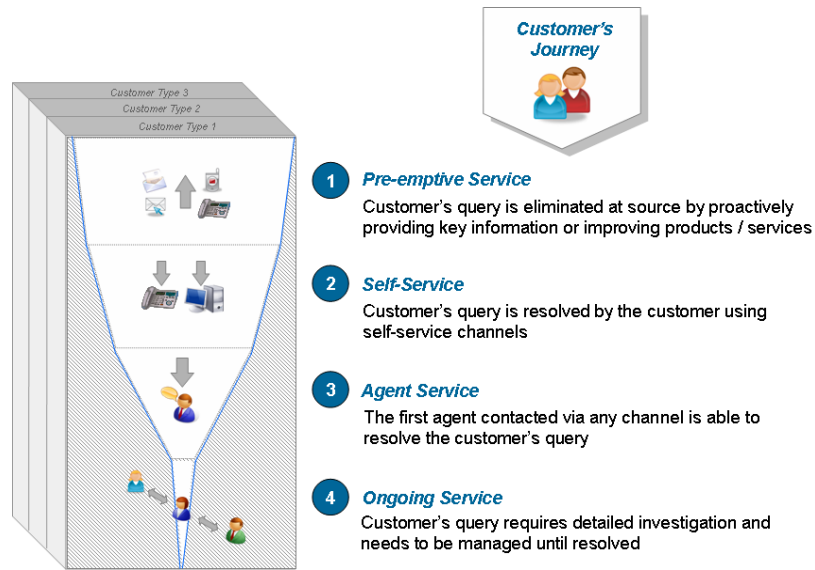
Almost every year, contact centre publications highlight reward and recognition as one of the most influential contact centre capabilities for improving agent performance. However, it can just as easily be counter productive if not done in the right way. From our experience:

- Know what the right things are by starting with a good understanding of what great performance looks like. This should form the basis for understanding the skills, knowledge and behaviours your agents require.
- Ensure you can measure the indicators of great performance efficiently and effectively. With the recent focus on experience rather than efficiency metrics it is critical that contact centres have a robust call quality management capability
- Ensure that reward and recognition is available to all, it is aligned to the balanced scorecard (or equivalent performance measures), it includes both monetary and non-monetary aspects and it comes in a range of shapes and sizes e.g. regular informal feedback is as important as bonus payments

### Help customers to help themselves

Whilst in the past customers have relied on contact centre agents to provide answers to their questions, they are now better equipped than ever before to help themselves. However, the challenge for many customer service organisations is that their customers have not proved as willing to help themselves as they would have hoped.

In this environment, the contact centre agent is going to play a critical role in helping each and every service touch point illustrated in the diagram below works effectively:



**1. Agents must play an integral part in educating customers on the use of self-service**

Many customers do not understand what self-service options are available. Therefore, every service call is potentially an opportunity to educate customers about the use of self-service. Organisations doing this effectively abide by the following principles:

- Customers are only informed about self-service options when it would have helped them solve their query more efficiently
- The approach should support the organisation's segmentation strategy with a particular focus on educating low value customers about the benefits of self-service
- A range of approaches should be used to educate customers ranging from a verbal prompt at the end of a conversation (e.g. did you know you could have found that information on our website, would you like me to send you a link) to a reminder in an email (e.g. to find out more information please go to the following URL).

**2. Knowledge required by agents could also be made available to customers**

A considerable amount of time is spent identifying, authoring and publishing knowledge articles to be used by agents to answer customer queries. Why not also make this new information available to the customer?

This has been the question posed by a number of providers of knowledge management solutions who rightly believe that a knowledge layer that is shared between customers and agents is a better use of both time and money. These types of knowledge management solutions give agents a critical role in keeping self-service content relevant, up to date and aligned with customer's needs.

### 3. Call data can be used to improve more than the contact centre

Regularly collating and analysing call data enables contact centres to make a significant contribution to the improvement of self-service by identifying customer queries that could have been dealt with before they ever reached the agent. For example, queries:

- Caused by customers being unable to carry out a transaction using a transactional IVR
- That could have been solved by providing better information on the website
- Which would never have materialised had a particular product worked properly.

This insight, based on detailed root cause analysis of calls, can be used to either eliminate customer queries at source or, at the very least, help customers answer them without ever needing to pick up the phone.

## Collect more, share more and use more

Contact centre agents are under increasing pressure to provide a “need based” service to customers. However, as more and more customers use self-service rather than picking up the phone, contact centres run the risk of knowing less about their customers than ever before.

The high performing agents will be those who are able to make effective use of customer data from a wide range of channels. However, it will be the customer service organisations responsibility to ensure that it is available.

### 1. Provide agents with information about customers’ use of self-service

There are a number of products in the marketplace that allow organisations to monitor and track customers’ use of self-service. In addition to helping identify self-service improvements, this information can also be used to help provide the contact centre agent with a better understanding of customer needs. For example, if an agent knows what the customer has been looking at online it provides them with a potential lead that can be referenced during a conversation.

Taking this a step further forward, web collaboration tools enable agents and customers to interact together online whilst talking over the phone. This type of innovation serves to enhance the value of both self-service and the experience provided by the agent.

### 2. Empower the agent with a single view of the customer across all channels

A single view of the customer has tended to elude large organisations with countless legacy systems; a problem that will only be made more severe by the introduction of registration based self-service websites. However, those organisations that are able to effectively integrate these multiple sources of customer data and provide their agents with a single view of the customer will reap the benefits:

- Agents will have a complete view of the customer’s product set irrespective of where that product was bought
- Agents will see the latest customer information including changes of address, name changes, phone numbers and email addresses
- Agents will know about interactions that are in progress in other channels. For example, an outstanding complaint that is currently with the customer feedback team

It is impossible to even conceive of building a relationship with a customer who feels that you know nothing about them. Therefore, if we expect our agents to build relationships we need to provide them with information about the customer that will enable them to do so.

### 3. Use cross-channel customer information more effectively to identify and serve customers

As many contact centres can testify, information is not worth anything if it is not used effectively. Therefore once harnessed, customer information should be used to educate each and every interaction with the customer. For contact centre agents, the size of this task should not be underestimated:

- Key customer information must be made available to the agent in a simple, intuitive format so that they can read, understand and apply it simply and easily whilst on a call with a customer
- Technology should be used to support agents by highlighting important messages at defined points during an interaction. For example, at the end of a service call a pop-up window could inform the agent that the customer was recently looking at a particular product on the website
- Training and coaching will play a critical role in helping to develop the behaviours and skills required by agents to effectively identify and use customer information as part of a natural conversation with the customer
- Customer information should be used to help enhance both the process and the overall customer experience. For example, personalised greetings, pre-populated fields and forms, validating rather than entering information etc

In conclusion, the increased growth of self-service will have a profound effect on the role of the contact centre and its agents. However, instead of reducing its importance and its need to improve, the self-service revolution will be a catalyst to an unheralded improvement in contact centre performance.

To achieve this contact centres must recruit and develop better agents, that are better able to help customers interact with the organisation across a range of channels and who are equipped with a better understanding and an improved ability to deliver an exceptional “needs based” customer service.

In other words, if you are involved with contact centres in any way, the increased popularity of self-service does not give you an excuse to put your feet up...

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



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