

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

Gaining Visibility, Discipline and Control at Every Customer Touch Point

Introduction

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 given that consumer demand for communications anytime and anywhere is making customer-company collaboration through Web 2.0 and other channels the new norm.

A customer contact solution that combines workforce optimization (WFO) with advanced enterprise technologies 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 initiated.

Workforce Technologies Adoption: Growth Outlook from 2010-2013¹

- Workforce management - 27%
- Workforce optimization - 120%
- Social media - 93%

Workforce optimization capabilities increase visibility into customer interactions and extend process discipline and control across all customer touch points – from the contact center into the enterprise, and out to the partner ecosystem and the social sphere. For example, speech and desktop analytics, social monitoring, and other interaction recording tools capture, evaluate and report customer feedback and workforce performance data in real time. This information guides smarter, more agile operational decisions and empowers the workforce to improve performance through scorecards and automated coaching alerts. Comprehensive staffing plans and flexible scheduling allow the enterprise to marshal and intelligently apply the specialized knowledge of agents, back office staff and experts to customer interactions for the best possible outcomes.

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 enhanced collaborative experience for employees and a routinely positive customer experience. Integrated with unified communications (UC) technologies, 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.

What is Unified Communications?

Unified communications (UC) is not a technology; it's an approach to streamlining processes and achieving business goals that uses communications technologies. According to Gartner, UC offers the ability to significantly improve how individuals, groups and companies interact and perform, and enables multiple communication channels to be coordinated.²

¹ CedarCrestone 2010-2011 HR Systems Survey, 13th Annual Edition

² Bern Elliot and Steve Blood. Gartner, Inc. "Magic Quadrant for Unified Communications." Jul. 2010

1—Fully Integrate Unified Communications with Workforce Optimization.

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. UC and collaboration (UCC) brings together all communications channels and capabilities to connect all contributors to the customer experience – inside and outside the enterprise.

UC-powered workforce optimization capabilities save time, effort and guesswork and enable companies to resolve customer issues much faster. When they're combined with collaboration software like Microsoft® SharePoint® Server, these capabilities can seamlessly link enterprise expertise, back office resources and the contact center to automate all facets of customer engagement.

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 service to outpace customers’ short-lived patience and at the same time, cater to consumers’ enduring insistence on quality? 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.

UC-enabled rich presence not only identifies if a fellow user is online and available, it provides other details about that person, including expertise. This vital information links agents and others to the right person with the right information at the right time in a single communication session. Users view a dynamic list of available experts categorized by area of expertise and simply click to make the best connection. Transactions are more efficient and productive and lead to an improved total customer experience.

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, customer-centric knowledge network, ask-an-expert workforce optimization capabilities pull this customer into a closed-loop service experience with high potential for first contact resolution. Instead of resorting to a call-back, the agent takes advantage of UC-enabled rich presence to scan an online list of enterprise experts. Because workforce management is integrated to UC, he can identify an available product engineer who is already scheduled to support contact center inquiries. The agent uses the click-to-connect feature to call and collaborate with the expert, then sends a text message to the customer that confirms the stats are current. His response to the customer includes not only the requested data, but also a more in-depth performance benchmark report recommended and provided by the engineer.

In one session, the customer receives the information she needs and experiences a higher service level than she expected.

On-Demand Efficiency

Unified communications and collaboration can dramatically improve productivity by equipping agents to:

- Take advantage of features like rich presence for real-time collaboration through voice, instant messaging (IM) or desktop sharing
- View available experts by role or supervisors who can recommend the best qualified person
- Synch schedule information for the contact center, the back office and other functions with an industry-standard calendaring tool like Microsoft® Outlook®
- Access and update schedules over the phone and the Internet at any time and from anywhere

A New Customer Collaboration Model



The ability to connect directly or indirectly to the most helpful knowledge resources meets the needs of Consumer 2.0. By providing multichannel, open access to an optimized, closed-loop service experience, organizations can build mutually profitable relationships with customers.

2—Formalize an Expert Escalation Policy for the Enterprise.

Unified communications makes it possible for agents to escalate customer issues to the most qualified experts, and workforce management makes scheduling their time a practical reality. So how do organizations use experts' scheduled time most wisely? A formal escalation policy is additional insurance against the risk of inefficient processes or subpar results when dealing ad hoc with challenging customer dilemmas.

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

Two fundamentals work together to drive an effective escalation policy. First, multiple experts should be identified and enlisted to share customer contact responsibilities throughout the day. Second, organizations need to establish and allocate timeslots based on how manageable they are for experts. Agents can then access their best available problem solvers without any impact on experts' overall productivity. This approach takes full advantage of presence for agent-initiated searches as well as automated routing to achieve consistently reliable information quality — delivered more efficiently.

Formal escalation policies set clear, uniform expectations about roles and responsibilities for customer experience contributors within and across functions, and when those responsibilities apply. Having an accepted plan in place increases a company's ability to enhance the customer experience with the right information provided by the right person at the right time. The payoffs can include exceptionally efficient first call resolution and dedicated brand advocacy.

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 a solid starting point for gathering additional customer intelligence. When organizations also cover consumer activity via review and social sites, customer communities, short message service (SMS), blogs, video sharing sites, wikis and other collaborative online spaces, they can construct clearer and more complete customer profiles.

Cultivating Customer Contact-Ready Experts

Sophisticated workforce optimization technologies allow organizations to:

- Gauge experts' performance to ensure they provide the customer with the optimal quantity and the best quality of information
- Record experts' interactions with customers about sensitive topics to avoid costly disputes and potential litigation
- Involve the best experts in customer contact to improve customer satisfaction, while respecting the time and productivity demands of their other responsibilities

Digging Deeper into the Consumer Mindset

In social spaces, more companies are using advanced analytics techniques to:

- Monitor consumer comments and measure consumer sentiment across social networks, blogs, customer communities and other interaction hotspots
- Prompt participation in social media dialog when proactive alerts signal a change in consumer opinions and attitudes
- Identify emerging product and service issues or capture high-potential consumer ideas
- Uncover patterns and trends for one or more social media modes

³ CedarCrestone 2010-2011 Survey

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.

Quality monitoring capabilities are able to cast a wide net over customer contact activity in the contact center, back office, and other internal functions, and external interactions that occur in the social sphere or involve participation by federated partners. UC and collaboration capabilities combined with customer surveys, powerful speech and desktop analytics, and other enterprise feedback management tools make it possible to uncover key insights and significant trends.

Companies can more accurately and easily interpret information gathered through interaction monitoring and reporting with automated, pre-designed dashboards and custom reports. These working assets, provided by quality and performance management technologies, deliver measureable and meaningful results. Further, integrating interaction analytics into workflow in real time enhances decision-making acumen and cultivates continuous operational improvement aligned with business goals for next-generation enterprise performance.

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 ad campaign.

One challenge of balancing staff with transaction needs is the variation in response times for different types of work. For instance, when processing claims, fulfilling orders and completing other back office tasks occurs at multiple sites or outsourced locations, solving this equation becomes more complex. With the need to stay agile in the face of both predictable and unexpected staffing changes, forecasting and scheduling capabilities – as well as intraday performance evaluation and schedule tracking – are invaluable for attaining optimal efficiency and effectiveness.

In a multichannel environment, each channel can produce unique call volume fluctuations. Workforce management technologies simplify this scheduling challenge by measuring the number and type of customer interactions across different channels. Based on results, resources can be matched to anticipated customer demand in a specific channel. For instance, consumers are increasingly interacting with organizations on the web and when a transaction is initiated online, back office employees often handle the fulfillment. In this case predictive modeling gauges future demand for back office services so companies can optimize staffing to achieve higher customer satisfaction and lower costs.

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.

Dedicated Time for Engaging Customers

Designated social media responders and participants can influence brand perception and affinity through workforce management capabilities that:

- Determine scheduling adjustments needed to maintain optimal social media coverage
- Coordinate the availability of agents and experts to directly address individual needs revealed by chatter
- Optimize staff for unexpected events, for example, a groundswell of activity in the social sphere
- Reserve time for experts to engage in group dialogue, inform and educate consumers, and proactively create value-added experiences

“With social networking, collaboration is greater resulting in lower costs and the organization is able to be more agile and responsive.”⁴

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.

⁴ CedarCrestone 2010-2011 Survey

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.

5—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. Workforce optimization reporting and analytics technologies identify the best customer contact resources through insights into the customer experience and agent and knowledge worker 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.

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

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.

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 UC-enabled customer contact solution that tightly links business and communication technologies, and includes integral WFO capabilities, 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.

Keeping Customers Happily Queue-less

If a customer broadcasts a complaint about a failed product shipment on Twitter, workforce optimization's social media analytics capabilities may pick up the chatter and alert a designated company responder. The employee can immediately contact the shipping department, arrange to resolve the issue, and tweet the pertinent details to the customer who never lifts a finger to call, IM or email the contact center.

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.

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