

# Bridging the Gap Between Front and Back Office

Workforce optimization (WFO) solutions have transformed front office operations, but that's just the beginning. Learn how WFO and a blended workforce can revolutionise the customer experience

Businesses of every stripe are recognising the value of the customer experience. Two trends – rising consumer expectations and the emergence of social media and mobile devices – have caused business leaders to become ever more vigilant in their quest to deliver excellent customer service. In a recent survey, 75 percent of respondents cited “enhancing the customer experience” as a top priority for their organisation in the coming year. But many factors contribute to the customer experience. How can business leaders re-architect their organisational processes to deliver on this goal? A vital step is ensuring that the whole enterprise is focused on the customer.



To date, most companies have deployed workforce optimisation software only in the front office, primarily in the contact centre. Savvy executives recognise, however, that the back office is a major contributor to an excellent customer experience; the back office processing of customer requests accounts for nearly three-quarters of employees who support customer engagement. In addition, recent research shows that the back office is ultimately responsible for 60 percent of the customer experience. As our work with clients has demonstrated, companies that have successfully “blended” their front and back office workforces not only provide better customer service but also enhance operational performance, reduce costs, and improve employee morale.

## The Inner Workings of Front and Back Offices

Unfortunately, you cannot simply add back office employees to your existing front office workforce management system to see significant improvement, because the front office and the back office are very different environments.

The front office includes departments, such as the contact centre, marketing and sales, that have direct contact with clients. They operate in real-time as they pursue immediate resolution, so the work process usually requires just one person. Furthermore, their work is distributed throughout the day, so no backlog develops other than call or customer queues. In the front office, workforce optimisation has a long history of success, helping managers analyse historical performance, forecasting staffing requirements, avoiding surprise service level shortfalls, and reacting quickly to changes in call volume. WFO products are quite mature, having evolved to address today's front office needs, which makes them a crucial component of the day-to-day processes for most companies.

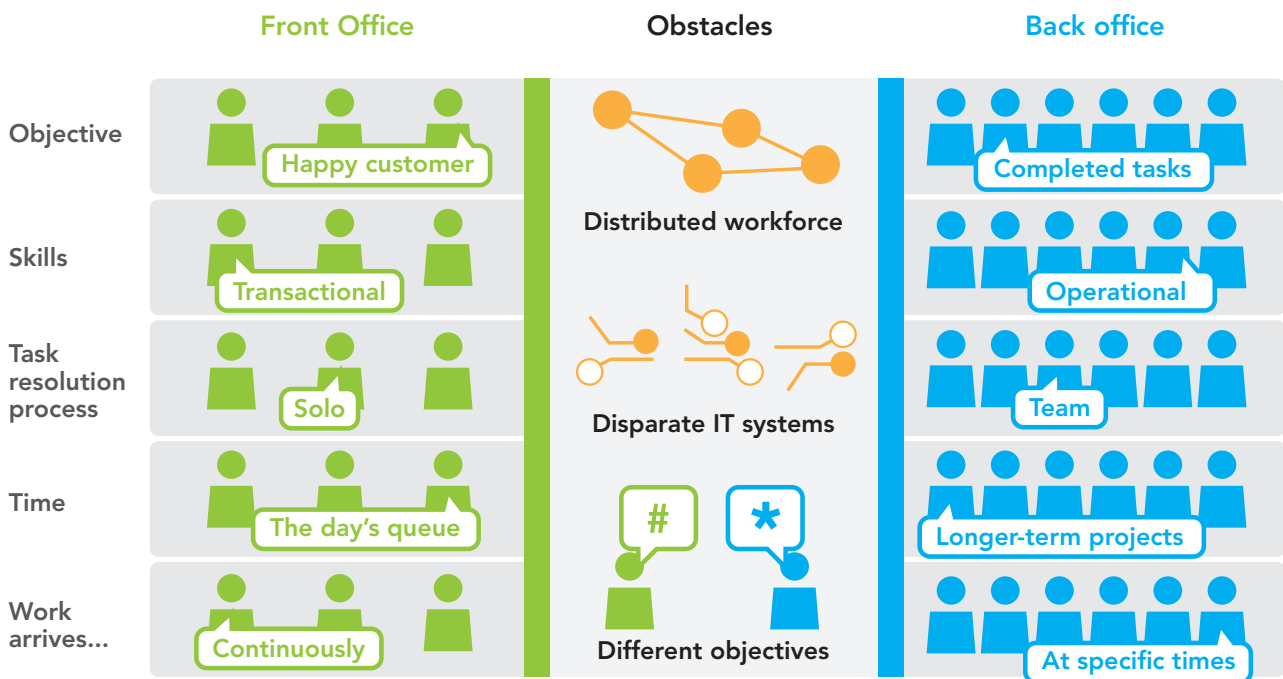
By contrast, back office employees usually perform very manual and routine work which doesn't involve having direct contact with customers. Their primary product is a “work item” or task that may require many different people and/or processes; therefore, a wide variety of skillsets are required.

Back office tasks may take hours, days, or even weeks to complete. Since work often arrives at specific times, such as at the end of the month or when mail is delivered during the day, significant backlogs can occur if staffing is not monitored and adjusted on a daily basis. Because of these real differences, the WFO toolsets that have helped streamline front office environments don't give you the same benefit in the back office.

employee must balance pleasing the customer with legal compliance, process adherence and speed of task completion.

This interaction demonstrates the problems inherent in the lack of coordination between the front and back offices. Despite the fact that customers will never have direct contact with the back office, 60 percent of customer dissatisfaction is attributable to problems in the back

## The Great Divide Between Front and Back Office



An example from the financial services industry illustrates the obstacles to achieving better customer service. Say that a bank loan officer is working with a customer to complete a mortgage application, with the goal of delivering timely and efficient service. There's a problem, however – the back office mortgage team needs more information to process the application, which will take some time. When the customer calls the contact centre for a status update, the agent can't easily determine where the application is in the process and must reach out to multiple back office departments for an update.

Several issues are in play. The loan officer, the agent pool and the back office team are geographically distributed and only interact with each other when problems arise. Incompatible legacy systems make it impossible to track an application's progress from inception to completion. Most significantly, they have different – sometimes adversarial – objectives. The loan officer and contact centre agent's top goal is to please the customer, while the back office

office. Limited collaboration and coordination between the front and back offices translates into a lack of visibility and misaligned priorities. After all, if the back office team is not aware of customer issues, back office supervisors cannot alter their operations to enable better customer service.

### A Well-Oiled WFO Machine

Companies can benefit hugely by introducing a WFO solution into the back office, especially when it is an extension of the existing front office solution. By offering unified management of staffing as well as centralised management of back office

work tasks, the WFO solution can transform the operation, enabling companies to:

- Forecast workloads and allocate staff accordingly
- "Blend" staff between front office and back office
- Redirect agents to back office work when call volumes are low

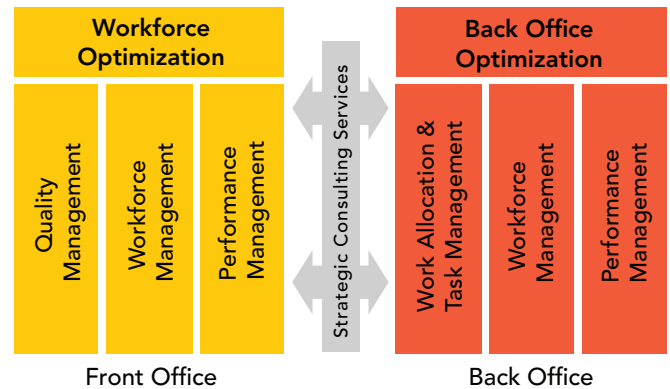
- Track each customer from work task receipt to successful completion
- Distribute work tasks across multiple parallel business processes
- Allocate and re-allocate work according to current skills and staff availability
- Provide end-to-end analysis on customer quality, work throughput, backlogs, service-level agreements (SLAs), and quality
- Analyse productivity, staff skills, and unit costs

A holistic approach to WFO and the enhanced functionality it offers can deliver four primary benefits:

1. **Better customer experience.** By connecting the front and back office, companies can give employees across multiple locations access to real-time information—a critical component to improving customer problem resolution and decreasing processing and handle times. In the example of the financial institution, the loan officer could use the system to review the application, identify outstanding information, and alert the customer without waiting for the back office to investigate the status of the application.
2. **Improved performance.** An integrated WFO strategy provides supervisors with the visibility to ensure employees are focused on high-value tasks and the flexibility to redirect capacity during critical times. The solution also provides managers with granular detail on each employee's daily productivity, quality, and bottlenecks. If an employee seems to be performing well but a breakdown continually occurs within his purview, the system can help pinpoint the problem.
3. **Targeted professional development.** A blended WFO solution provides management with the tools to expose employees to new types of work, helping to broaden skill sets and build institutional knowledge while simultaneously bolstering their capacity to adapt to changing conditions. With this functionality, managers are empowered to not only resolve issues but also design training and coaching to prevent recurring problems.
4. **Happier employees.** Supervisors can use WFO performance management software to identify and recognise top performers, which motivates other employees to excel. With greater visibility and support, employees are able to more easily reach their goals, resulting in greater satisfaction and lower turnover.

## The Blended Workforce in Action

Aspect Software has developed an integrated and full-featured solution in its Advanced Back Office Optimization offering. This complete back office suite includes work allocation and task management, multi-skill workforce management (integrating front and back office) and performance management functions. Clients are discovering just how effective the Aspect® Advanced Back Office Optimization technology can be.



An insurance outsourcer is using the Aspect technology to blend its front and back offices by implementing a real-time call management solution that monitors call arrival rates. When call volumes are low, the solution identifies “useable chunks of time” during which call centre employees can perform back office tasks. This work is assigned based on the priorities of the outstanding back office work and the skills of the individuals, ensuring that the right work is being accomplished by qualified people at the right time. With the solution, call centre employees can access real-time records of outstanding back office work to let customers know when work items will be completed – or can even complete it themselves. The company is seeing improved productivity, shorter turnaround times, and an increased ability to absorb spikes in work volume, which in turn reduces recruitment costs.

Similarly, the Aspect technology is being used by a mortgage lender, which merged regional practices that had very different work processes and cultures. The parent company wanted to find a balance between operational effectiveness and cost – but to achieve this goal, management first needed a way to provide visibility and transparency to measure back office employee and operational performance. By implementing WFO in the back office, the company was able to forecast and plan resources, create consistent SLAs across the organisation, and immediately improve throughput. As a result, employees are consistently able to clear more work than

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they receive on a daily basis. By connecting the front and back offices, the mortgage lender is able to achieve next-day processing – to the delight of employees and customers alike. The new WFO solution improved not only staff performance but also morale, service quality, and the customer experience.

Although few companies have yet to implement WFO in their back office operations, the word of the significant benefits is spreading quickly. And it's an easy to understand why. There's a long history of WFO success in the front office, so why can't it be implemented in other areas of the business? Over the next few years, we will undoubtedly see a wave of new adoptions in this new frontier for workforce optimisation.

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**About Aspect**

Aspect's fully-integrated solution unifies the three most important facets of modern contact centre management: customer interaction management, workforce optimisation, and back-office. Through a full suite of cloud, hosted and hybrid deployment options, we help the world's most demanding contact centres seamlessly align their people, processes and touch points to deliver remarkable customer experiences. For more information, visit [uk.aspect.com](http://uk.aspect.com).

