

Bridging the Gap Between Front and Back Office

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

Businesses of every stripe are recognizing the value of the customer experience. Two trends – rising consumer expectations and the digital world – have caused business leaders to become ever more vigilant in their quest to deliver excellent customer service. When surveyed, 75 percent of respondents cited “enhancing the customer experience” as a top priority for their organization in the coming year. But many factors contribute to the customer experience. How can business leaders re-architect their organizational 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 optimization software primarily in the contact center. Savvy executives recognize 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, 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

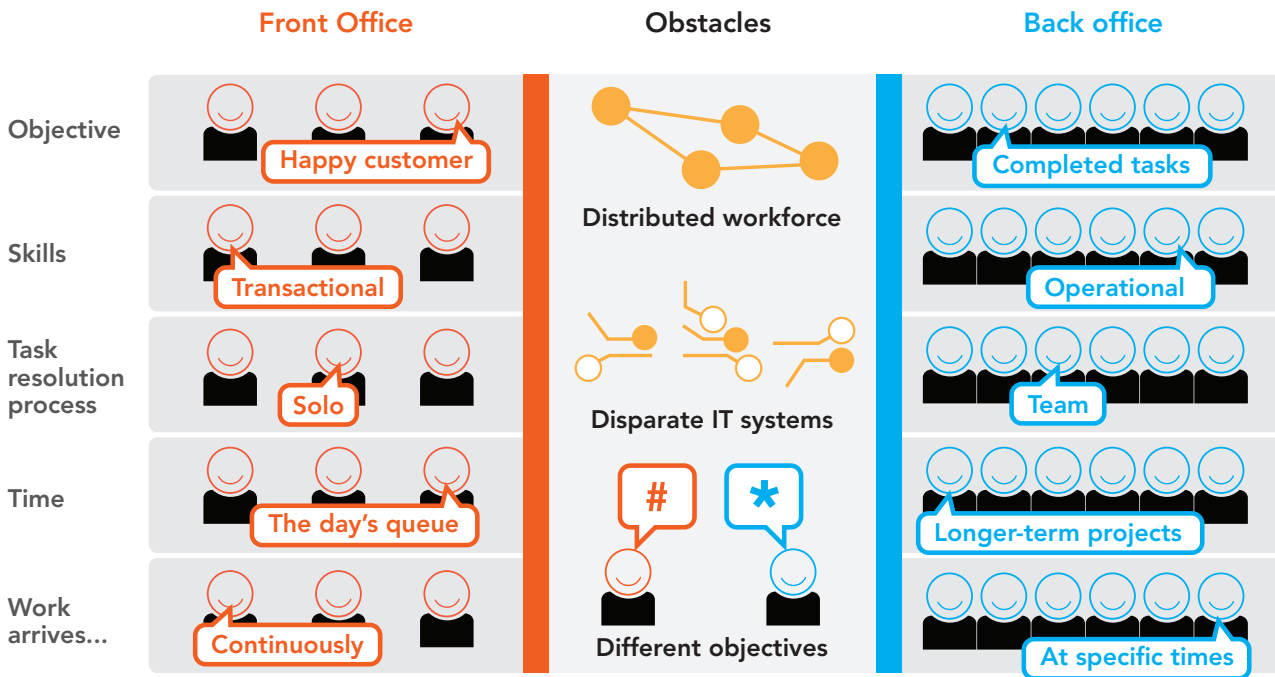
Unfortunately, you cannot simply add back office employees to your existing front office workforce management system to see significant improvement due to the different operational environments.

The front office includes departments, such as the contact center, marketing, and sales, that have direct contact with clients. They operate in real-time as they pursue immediate resolution. The work is received throughout the day and requires immediate attention. In the front office, workforce optimization has a long history of success, helping managers analyze historical performance, forecasting staffing requirements, avoiding surprise service level shortfalls, and reacting quickly to changes in contact volume. WFO products are mature, having evolved to address today’s front office needs making them a crucial component of the day-to-day operations for most companies.

There has always been the perception that back office employees perform very manual and routine work which does not involve having direct contact with customers. We know this is not always the case. Although the primary function is to process “work items” or tasks, there are many types of work that require direct contact with the customer. Different types of customer requests may require many different people and/or processes; therefore, a variety of skills are required to complete a single customer request.

Back office tasks may take hours, days, or even weeks to complete. The service level expectations are unique to each touch point that in turn is part of the end-to-end customer journey. Significant backlogs can occur if staffing is not monitored and adjusted daily. Because of these real differences, the WFO toolsets that have helped streamline front office environments do not give you the same benefit in the back office.

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 is a problem, however – the back office mortgage team needs more information to process the application, which means reaching out to the customer to obtain the required information. When the customer calls the contact center for a status update, the agent cannot always 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 center agent's top goal is to please the customer, while 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. Even though customers may never have direct contact

with the back office, 60 percent of customer dissatisfaction is attributable to problems in the back 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 centralized 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
- Understand target staffing requirements to meet demand and deadline goals
- Engage your staff with state-of-the-art employee engagement platforms

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, you gain full visibility of the total workload, priority functions and service expectation which enables you to visualize the end-to-end customer experience and identify areas requiring attention. You will gain insight into processing backlog which helps to identify issues that impact the overall customer experience.
- 2. Improved performance.** An integrated WFO strategy provides supervisors and leaders with the visibility to ensure employees are focused on high-value tasks with the flexibility to redirect capacity during critical times. The solution also provides managers with granular detail on each employee's productivity, quality, efficiency and utilization.
- 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.** With a centralized and holistic view of the blended workforce, supervisors and leaders can use WFO performance management software to build continuous improvement programs to raise employee morale and performance. Furthermore, providing employees with visibility enables them to reach their goals more easily, resulting in greater satisfaction and lower attrition.

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 organization, and immediately improve throughput. As a result, employees are consistently able to clear more work than they receive daily. By connecting the front and back offices, the mortgage lender can 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 is easy to understand why. There is 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 optimization.

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About Aspect

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