Putting Workforce Optimization to Work

Delivering on the expectations of the mobile, multichannel customer requires companies to predict customer demand and manage agent resources more effectively.

Just the Facts: Today's connected customer has high expectations from the companies with which they do business. Companies like Amazon, Apple, and Zappos that are meeting those needs and delivering optimal customer experiences have raised the bar for all companies. As a result, customers expect outstanding experiences and personalized service from the companies they do business with and have waning patience for those that fail to deliver on these expectations. Left frustrated or dissatisfied, customers may take their business to other companies—and never return.

In fact, the main reason that customers abandon a company (70 percent) is due to poor customer service, according to research by N'Lighten, a customer service consultancy. Meanwhile, more than 90 percent of those customers won't buy from the same company again.

Together, those trends reveal a need for rapid customer response in contact centers. "There's a real need for contact centers to become more agile," says Kristyn Emenecker, vice president of product marketing at inContact.
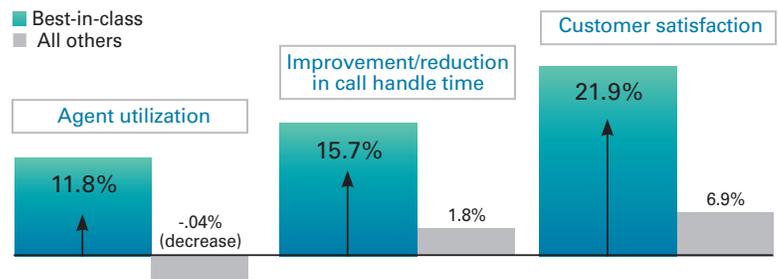
Meanwhile, there are other factors at play. Social media has changed the playing field for contact center management. "Social media amplifies customer feedback like never before," says Cheryl Nolan, director at Peppers & Rogers Group. This creates new risks, as well as opportunities, for delivering customer service.

Amid these changing customer and market dynamics, contact centers are challenged to do more with less. As customers use a growing number of channels to resolve product and service issues, contact centers are struggling to keep pace. According to Dimension Data's Global Contact Center Benchmark report, answering speed, response quality, and resolution rates have continued to deteriorate across worldwide contact centers since 2009.

Clearly, contact centers need help in meeting rising customer demands. "Now more than ever, contact center leaders need the right tools to assess agent skills, identify gaps in service, schedule teams for peaks and valleys in customer demand, and to help connect the right agents with the right customers," says Jennifer Waite, product marketing manager at inContact.

WFO: Driving Results

The use of workforce optimization (WFO) tools and techniques can help companies to achieve above-average gains in agent productivity, call handle time, and customer satisfaction improvements.

- Best-in-class
- All others

Agent utilization — 11.8% / -.04% (decrease)

Improvement/reduction in call handle time — 15.7% / 1.8%

Customer satisfaction — 21.9% / 6.9%

Source: Aberdeen Group, "Workforce Optimization in the Contact Center."

Gaining Agility via the Cloud

Many contact centers that have successfully solved these challenges, and are delivering on customer expectations for efficient and thorough service, are using cloud-based workforce optimization (WFO) tools and techniques. WFO capabilities can help companies better predict customer demand while enabling businesses to align agent skills, availability, and expertise with customer needs and preferences.

Cloud-based WFO tools can also help companies adapt and adjust to market changes on the fly as the role of the contact center continues to evolve and the required skill sets constantly shift. Furthermore, companies can leverage cloud-based WFO tools to schedule the optimal number of at-home agents with the appropriate skill sets to address anticipated shifts in customer traffic.

Ultimately, companies that are able to adapt to evolving customer and market dynamics will be best positioned to provide customers with superior channel experiences through their ability to match the right agent to the right customer at the right time. Companies that are able to meet these requirements are more likely to generate higher levels of customer satisfaction and loyalty, which in turn will lead to better business results.

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From Peppers & Rogers Group

5 Tips for Maximizing Workforce Optimization

Workforce optimization tools and techniques aren't new to the contact center. However, changing customer dynamics, including the need for companies to meet rising customer service expectations across a multitude of channels, is forcing contact center leaders to find more effective ways to utilize their resources and improve the customer service experience. Here are five tips for maximizing WFO tools to improve the performance and productivity of contact center workforces and deliver superior customer experiences.

1. Overlay customer insight for better decision-making. Companies can blend the data captured from their cloud-based WFO tools with customer analytics to better understand why customers are reaching out to the contact center. Companies can integrate customer information from their CRM systems into their WFO tools to segment customers by channel usage, or geographic location, and to determine the types of issues they're trying to resolve.

"The use of analytics and WFO tools can help decision-makers to determine the types of issues that are expected to hit the contact center during certain periods and then use these insights to schedule agent resources accordingly," says Cheryl Nolan, director at Peppers & Rogers Group.

2. Match agent skill sets to specific service activities for greater efficiency and performance. Contact center managers often don't know or have trouble remembering the specific skills, strengths, and weaknesses of individual agents. This is especially true in larger contact centers where hundreds of agents are geographically dispersed. WFO tools can help managers to assess the specific skills of their agents and then schedule resources as needed when spikes in specific contact channels are expected to occur (e.g., chat agents may be required from 4 p.m. to 10 p.m.). Managers can also apply this logic with skills-based contact routing to align agents with certain types of customers.

3. Apply sentiment analysis to identify gaps in agents' skill sets. Companies can use search engine optimization (SEO) techniques as well as voice, sentiment, and text analytics to help identify and drill down on opportunities for improvement, either on a team or individual level. Contact center managers can also use these tools to analyze and compare behaviors on a granular level between top-performing agents and those agents whose performance may be lagging in certain areas (e.g., first contact resolution) and use these insights for coaching or e-learning opportunities.

4. Analyze channel-specific behavioral data to determine the best treatment strategies. Decision-makers can make use of channel-specific behavioral data, as well as customer feedback provided in surveys and recorded call center interactions, to help decipher the components of customer service that matter most to high-value customers. They can also determine the reasons why customers are reaching out to the contact center and the frequency in which customers are communicating about certain types of issues.
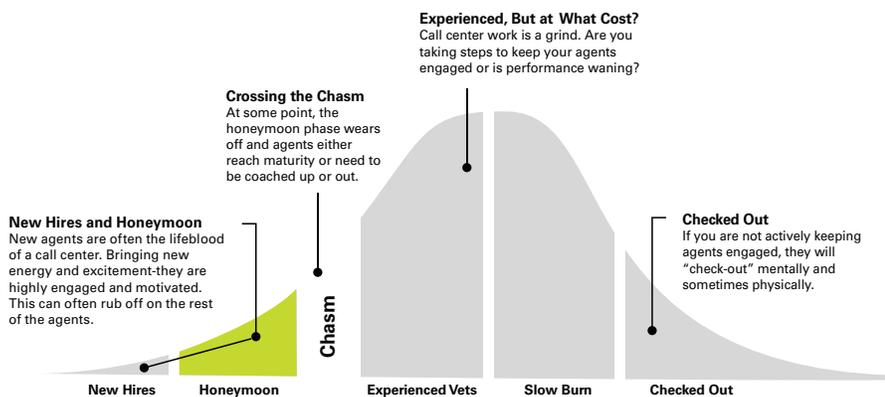
5. Match agents to specific customers for greater productivity and customer satisfaction. Workforce optimization can have a trickle-down effect on productivity. If a customer calls and their inquiry is responded to quickly and effectively, this results in first contact resolution and a more satisfied customer. The same is true when WFO tools are used to match the right agent to the right customer for upsell/cross-sell opportunities or for collections. Connecting the right agent to the right customer helps drive down contact center costs and reduce contact volume, thus improving operational efficiency.

WFO tools and techniques can help contact center leaders ensure the number of calls an agent handles by understanding the patterns in the company's multichannel contact volumes and using these insights to make sure that the contact center has the right level of occupancy to provide customer service in different channels (voice, chat, email, mobile).

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>
> —Cheryl Nolan, *director, Peppers & Rogers Group*

Pondering the Agent Maturity Lifecycle

The single most important component of workforce optimization is the agents who are on the front lines. Contact center leaders must continually evaluate the skills, engagement levels, and motivational incentives for individual agents in order to maximize productivity.

New Hires and Honeymoon
New agents are often the lifeblood of a call center. Bringing new energy and excitement-they are highly engaged and motivated. This can often rub off on the rest of the agents.

Crossing the Chasm
At some point, the honeymoon phase wears off and agents either reach maturity or need to be coached up or out.

Experienced, But at What Cost?
Call center work is a grind. Are you taking steps to keep your agents engaged or is performance waning?

Checked Out
If you are not actively keeping agents engaged, they will "check-out" mentally and sometimes physically.

New Hires | Honeymoon | Chasm | Experienced Vets | Slow Burn | Checked Out

Source: Call Me! IQ

The Business Benefits of Agent/Customer Matching

Matching the right agent to the right customer benefits both the customer and the company. Customers benefit by being connected with an agent who understands their needs and preferences, and has the right skill mix to address a specific issue. The customer is more likely to have their issue resolved quickly and satisfactorily.

Effective agent-customer matching offers other advantages. "There's also tremendous value to be gained from an efficiency standpoint and in terms of creating customer intimacy," says Nolan. Connecting customers with agents who have the necessary skills to resolve their issues during first contact can lead to deeper, richer relationships since customers are more likely to have an extended dialogue with agents during a positive interaction. Customers who trust a company's ability to deliver are also more likely to conduct additional business with the company in the future.
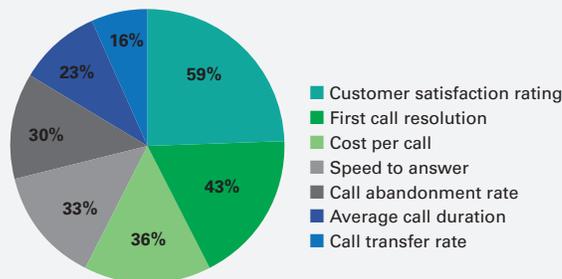
"When you are able to have a trusting conversation with customers it will lead to more constructive information sharing," says Nolan. When companies use this information wisely, the customer is likely to become more loyal and develop into an advocate of your brand, which can translate into incremental revenue via word-of-mouth recommendations.

Effective agent-customer matching can also drive higher revenues or collection rates. "When the right agent is connected to the right customer for fundraising, that agent is more likely to explain the fundraising effort effectively to the customer and better position the organization to meet its goal," says Waite.

The Evolution of Contact Center Performance Metrics

Workforce optimization tools and techniques can help contact centers operate more efficiently and drive greater business value to the enterprise. It's critical for decision-makers to align the goals of the contact center with prioritized WFO efforts.

"How important are these contact center metrics compared with two years ago?"

- 59% — Customer satisfaction rating
- 43% — First call resolution
- 36% — Cost per call
- 33% — Speed to answer
- 30% — Call abandonment rate
- 23% — Average call duration
- 16% — Call transfer rate

Source: The U.S. Contact Center Decision Maker's Guide 2012.

Becoming an Agile Contact Center

Rising customer expectations, coupled with customers' increasing use of digital channels for customer service, are making it increasingly difficult for contact centers to deliver on customers' needs. Customers expect swift and absolute resolution to their dilemmas, regardless of the channel they use. One effective way to manage the multichannel contact center more effectively while keeping pace with the mobile, digital customer is through the use of a cloud-based contact center services platform.

Cloud-based WFO and other tools offer contact center leaders the ability to deliver customer service in a much more agile and responsive manner. For example, cloud-based WFO tools can be used to identify periods when voice, mobile, and other types of contact center volumes are expected to peak. "Contact center leaders can use these insights and WFO tools to identify which contact center and at-home agents are available for scheduling, and to shift resources as needed based on anticipated customer needs and skills matching," says Waite.

"There's a growing need for companies to be more agile in the way they deliver customer service, especially for those consumers who expect more personalized services," says Emenecker. Feature and function-rich WFO tools that are supported out of "The Cloud" can enable companies to scale up and down with resources on an as-needed basis. Meanwhile, a cloud-based approach to supporting contact center operations provides companies with greater agility as they can add new WFO functionality or capabilities on the fly with the click of a button without being burdened or slowed down by software upgrades.

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vice president of product marketing, inContact

Getting Started

At its core, WFO isn't a technology—it's a set of processes that can be improved through the use of technologies.

To that end, it's also important to remember that customer service is a continuous improvement exercise. "There are always ways to improve some components of customer service within your organization," says Emenecker. WFO tools can be used to help identify those opportunities, especially with regard to agent coaching and training for skills development.

One of the strengths of cloud-based WFO tools is how they can help companies to continually develop agent skills cost effectively. For example, instead of taking agents out of the rotation and sending them off site for training (including travel, meals, and other expenses), e-learning modules can be integrated with cloud-based WFO tools and provided to agents to study from during quiet periods, says Waite. That's a more cost-effective and productive approach to utilizing available agent time.

Another benefit to using cloud-based WFO tools is the ability to add new features and functionality on-the-fly. "This is especially critical in today's digital economy to allow companies to quickly address shifting market dynamics and customer requirements," explains Nolan.

In today's highly competitive marketplace, it's become increasingly difficult for companies to distinguish themselves by their products or prices. Customer service has emerged as a competitive differentiator. In order for companies to outperform their rivals on the customer service stage, they need to ensure that they are satisfying and delighting customers by connecting them to the right agents at the right time. Cloud-based contact center and WFO tools can provide companies with the agility and power to respond to customer needs quickly and effectively. And, because these tools are web-based, companies of all sizes can easily scale their resources up or down when they need to.

"The cloud," says Emenecker, "is the great equalizer."

The Cost to Recruit and Train Agents

Companies invest a great deal of money in training and coaching agents. WFO tools and techniques are extremely effective in helping contact center leaders to identify agent skill gaps and opportunities for cost-effective coaching and e-learning.

More than $9,000	14.7%
$7,001-$9,000	5.9%
$5,001-$7,000	22.5%
$3,001-$5,000	37.3%
Less than $3,000	19.6%
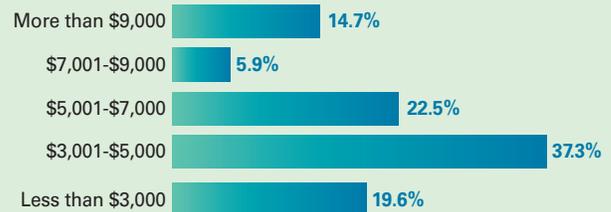
Source: National Association of Call Centers

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