



2022 MARKET STUDY

# Customer contact industry review



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## CUSTOMER CONTACT INDUSTRY REVIEW

Change may be the explanation for challenges. It cannot, however, become an excuse for struggle.

This adage is certainly valid in the realm of customer contact. As contact centers deal with vast marketplace uncertainty, the sudden emergence of full-time remote work and the proliferation of digital channels, they also face heightened customer and employee expectations. Whatever tolerance customers and employees had for “passable” experiences is seemingly vanishing by the minute.

As a result, whatever tolerance the contact center had for complacency must also disappear.

To some extent, it most certainly has. CCW Digital’s Customer Contact Industry Review reveals a handful of operational “wins,” as well as progress on the road toward more frictionless and personalized customer journeys.

Much work, however, remains to be done. Most contact centers continue to face challenges related to technology, employee engagement, omnichannel strategy, and artificial intelligence.

A research-driven window into the state of the contact center, this report breaks down recent wins, losses, and opportunities, while revealing steps leaders can take to engage their agents, satisfy their customers, and drive better customer experience and business outcomes.

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## METHODOLOGY & DEMOGRAPHICS

To acquire research for the 2022 Customer Contact Industry Review, CCW Digital issued a survey to leaders responsible for contact center, customer experience, customer service, marketing, IT, operations, design thinking, business intelligence, sales, and product development across organizations of all sizes in most major industries.

Example respondent job titles included chief executive officer, vice president of CRM, director of customer care, senior manager of customer service, senior manager of customer loyalty, senior vice president of customer service and operations, director of member operations, head of transformation, senior director of quality, global head of analytics, chief experience officer, manager of e-commerce customer service, executive vice president of client communications, and vice president of member success.

## ABOUT THE AUTHOR



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Brian Cantor is the principal analyst and director for CCW Digital, the global online community and research hub for customer contact professionals. In his role, Brian leads all customer experience, contact center, technology, and employee engagement research initiatives for CCW. CCW Digital's articles, special reports, commentaries, infographics, executive interviews, webinars, and online events reach a community of over 150,000.

A passionate advocate for customer centricity, Brian regularly speaks on major CX conference agendas. He also advises organizations on customer experience and business development strategies.

## KEY FINDINGS

- 1 Work-from-home has risen to the forefront over the past two years, and the customer contact community has adapted reasonably well. Sixty percent (60%) of companies feel they successfully established or improved their remote work strategy, making it the most noteworthy “win.”
- 2 Other key wins include achieving success against important metrics, better leveraging customer data, elevating self-service, and garnering better customer feedback.
- 3 The majority of companies feel they have been “somewhat successful” at achieving the pivotal contact center goals of reducing effort and increasing personalization.
- 4 As they celebrate wins, contact centers are also acknowledging challenges. Modern labor issues, such as “The Great Resignation,” make for the biggest challenge area.
- 5 Other challenges include ineffective automation, fragmented technology, fragmented channels, and limited budgetary support.
- 6 Make no mistake: salary matters. Contact centers identify compensation as the #1 driver of agent frustration.
- 7 Additional agent experience issues include ineffective technology, insufficient career pathing, an unacceptably high amount of low-value work, and inadequate access to customer data.
- 8 When it comes to assessing performance, CSAT remains the standard. Customer satisfaction and retention metrics are the most important barometer for today’s contact center functions.
- 9 Business metrics, efficiency metrics, resolution metrics also have comparatively high support.
- 10 Live phone support remains the most effective contact channel, at least as far as contact center leaders are concerned. “Modern” channels like video, web self-service, and messaging have the lowest success rates.
- 11 Granted, companies are not losing faith in digital. By 2025, roughly half of contact centers expect to handle the majority of customer issues *entirely* in digital channels.
- 12 Contact centers identify accuracy and consistency as the top “make or break” customer experience factors.
- 13 Personalization, resolution quality, and wait time also play a decisive role in impacting the customer experience.
- 14 Improving agent workflow ranks as the top focus for AI investments. Knowledge management, real-time performance management, and customer data also represent popular use cases.



## CELEBRATING THE WINS

There are no limits to how well brands can deliver for their customers and employees, which means the customer contact journey is never over. Opportunities for improvement always exist.

Contrary to the tone of much industry commentary, however, there are ample opportunities for celebration. Whereas thought leaders often focus on the customer contact community's long-standing shortcomings and newly emerging challenges, objective observers will acknowledge that most contact centers are enjoying some success. They are making savvy investments, revitalizing customer journeys, and empowering employees to perform.

One particularly big win in the past year concerns distributed work strategy. **A healthy 60% of contact centers, in fact, believe they have successfully established or improved their strategy for engaging remote and hybrid workers.**

Although remote work rose to the forefront as a *response* to COVID-driven social distancing in the spring of 2020, it has shown no signs of fading away. CCW Digital's Future of the Contact Center Market Study, in fact, confirms that only a thin minority of businesses have plans to revert back to the traditional on-site model. Whether in the form of wholly remote or hybrid models, the rest know their contact center teams will not always be under one roof.

Given that reality, it is welcome to see strides toward a sustainable, productive distributed model. Companies are no longer simply surviving the pivot to remote work; they are leveraging it as an opportunity for excellence.

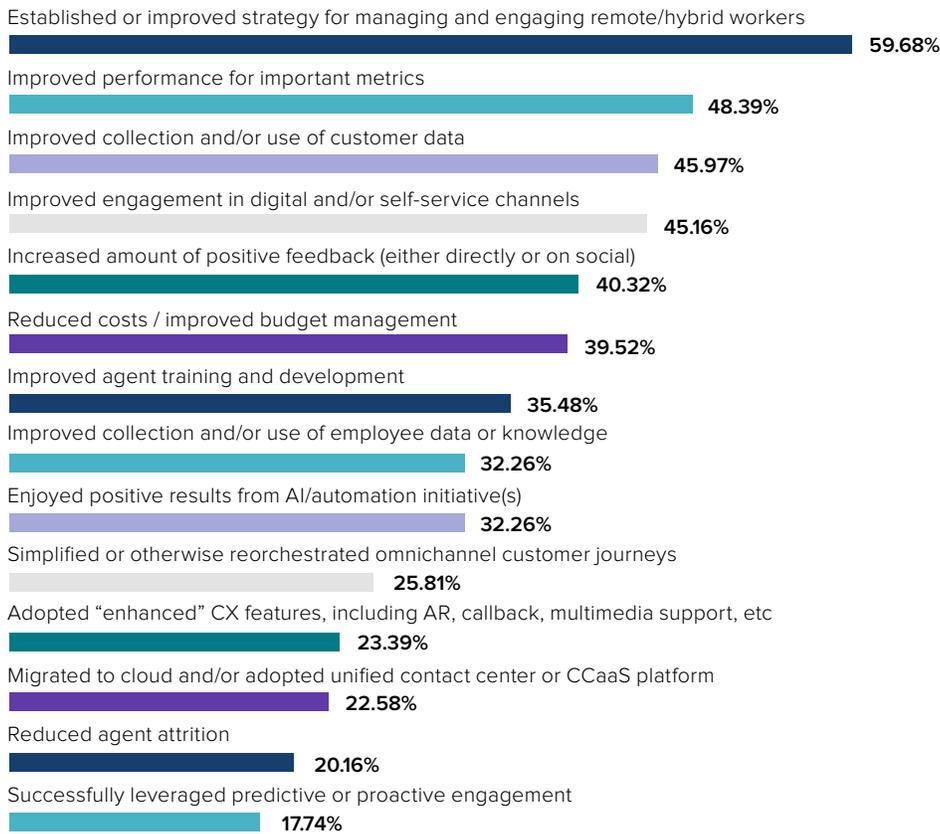
Other "wins" include **success against key performance metrics (48%), better leveraging of customer data (46%), improved value and utilization of digital and self-service (45%), and increases in positive customer feedback (40%).**

There are no participation trophies in the business world; contact center conversations, investments, and strategic shifts are for naught if they do not produce meaningful results. Although the community clearly has a long way to go overall, the fact that nearly half are seeing demonstrable improvements in metrics and in customer feedback is very encouraging news. Clearly, good ideas are beginning to turn into favorable realities.

Every facet of the customer contact operation hinges on access to more informative and actionable customer data. The 46% improvement rate suggests companies are both acknowledging this reality *and* seriously exploring the vast, often AI-driven solutions for uncovering insights from all conversations, in all channels.

With the "digital transformation" largely dominating the customer contact conversation over the past decade, and taking on new importance during the COVID-era volume surges and resource crunches, it is clear that talk is finally becoming walk. Companies are finally creating customer-centric digital experiences, and customers are finally taking notice.

## What are some “wins” your contact center/customer contact function has celebrated over the past year?



### REDUCING EFFORT, INCREASING PERSONALIZATION

When it comes to assessing “wins,” it is important to look at two of the most pivotal and fundamental customer contact objectives: reducing effort and increasing personalization.

For many years, companies have recognized that an easy, convenient experience is a crucial pathway to customer satisfaction. For even longer, they have acknowledged the importance of tailoring experiences to individual customers. The notion of treating customers as “people, not numbers,” after all, is nearly as recognizable as the adage that “the customer is always right.”

As fundamental as these focuses have long been, they also have new importance in a modern context. Reducing customer effort marked a pivotal priority as customers (and employees, for that matter) dealt with a barrage of challenges and complexities during the COVID pandemic. Effort also has a direct connection to the digital transformation, which emphasizes the importance of convenience.

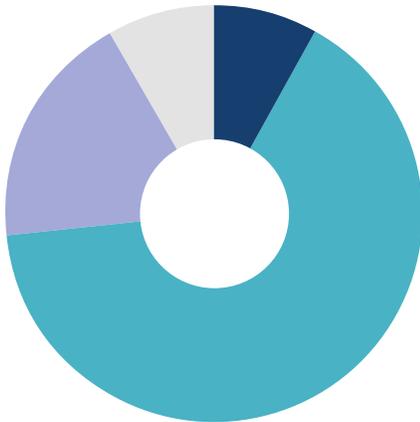
The digital transformation, meanwhile, introduces challenges and opportunities for personalization. On the one hand, demonstrating a traditional form of “personalization” may be more challenging in low-touch or no-touch digital experiences. On the other hand, digital channels increase a brand’s power to capture and action contextual customer insights.

Ultimately, no customer contact “industry review” can ignore the importance of effort and personalization. For 2022, said review identifies a modest – but not overwhelming – degree of success in both columns.

Although only 8% of companies *struggled* to reduce effort this year, just 19% feel they were very successful. Sixty-five (65%) say they were somewhat successful, with the balance surprisingly claiming that effort was not a focus.

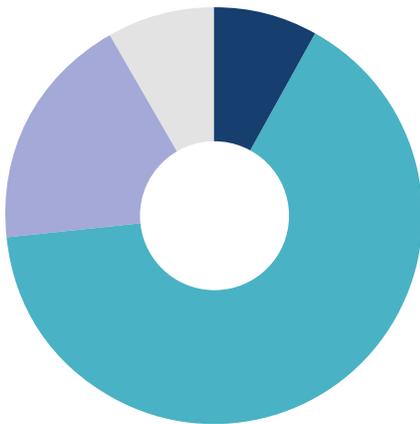
The numbers are comparable for personalization; 7% were unsuccessful, 20% were very successful, and 69% were somewhat successful.

**Over the past year, how successful has your organization been at reducing customer effort?**



- 8.06% Not at all
- 65.32% Somewhat successful
- 18.55% Very successful
- 8.06% N/A - We haven't been focusing on customer effort

**Over the past year, how successful has your organization been at creating more personalized customer experiences?**



- 7.26% Not at all
- 68.55% Somewhat successful
- 20.16% Very successful
- 4.03% N/A - We haven't been focusing on personalization



## ACKNOWLEDGING THE CHALLENGES

Celebrating wins may be an important and overdue exercise for the customer contact community, but acknowledging challenges remains utterly essential. In the quest to empower employees, delight customers, and grow businesses, the typical contact center still has plenty to overcome.

Most notably, today's customer contact teams are dealing with an immensely difficult labor market. **Modern labor challenges, such as rising wages, changing work habits, and the “Great Resignation,” represent a concern for a whopping 62% of customer contact teams.**

Concern over the difficult labor market is the antithesis of a surprise. Despite decades of trumpeting the connection between happy employees and happy customers, many contact centers have routinely failed to cultivate a pro-employee culture. In turn, agent attrition has long reigned as a notorious contact center challenge.

With COVID-19 and the rise of remote work causing employees to rethink their career decisions at the same time they have access to an infinitely wider pool of employers, the threat of turnover is even greater. Worse, the prospect of attracting quality replacements for those who leave is more difficult than ever.

This is all happening, of course, as customer demands – and thus standards for agent competency – exponentially rise.

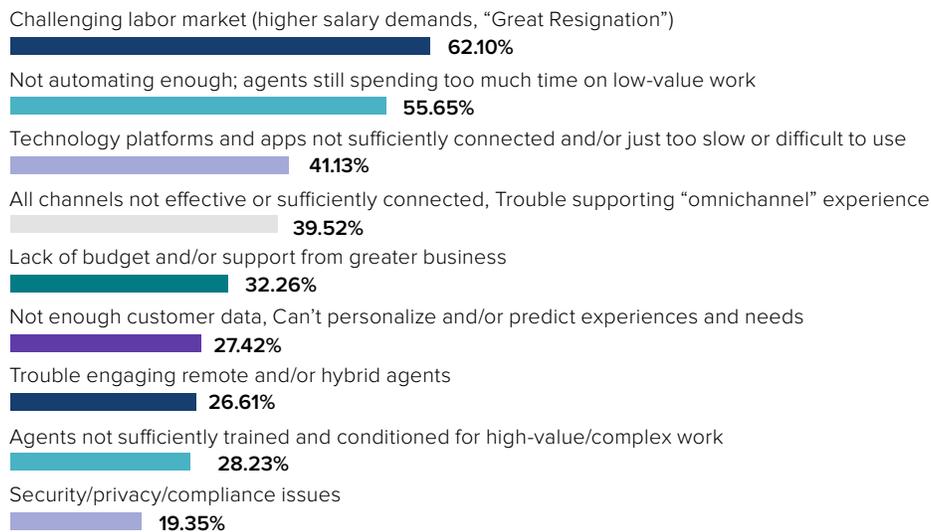
Other key challenges **include failure to automate enough low-value work (56%), disconnected technology (41%), disconnected channels (40%), and lack of budgetary support from outside the contact center (32%).**

The former two directly connect to the agent engagement challenge; companies that do not optimize technology to *reduce agent effort* and *strengthen agent performance* will only exacerbate ill sentiment and thus heighten the risk of turnover.

They, as do disconnected channels, also trickle down to customers in the form of bad experiences. When agents not only have a limited ability to focus on customers due to the excess of menial tasks but difficulty recognizing and supporting the customers with whom they are engaging, the experience will suffer.

Without strong budgetary support, companies have little opportunity to address these issues.

## Which of the following challenges are seriously affecting your contact center/customer contact function?



### UNDERSTANDING AGENT FRUSTRATION

With agent happiness perennially ranking as a top priority and labor market issues presently ranking as the top challenge, it is important to understand the factors that drive agent frustration. What aspects of contact center working are sending agents out the door – either to competitive organizations or other fields completely?

Compensation is the leading such factor. **A substantial 47% blame compensation, whether referring to base salary or incentives and perks, as a driving force behind agent frustration.**

Despite endless declarations about how *important* contact center agents are to the business world, the profession has never been known for stellar compensation. As they enjoy a seller's job market *and* hear constant talk about the growing value (and complexity) of agent work, agents have more reason than ever to demand better pay – and feel dissatisfied when they do not receive it.

Other noteworthy frustration drivers include **inefficient or ineffective systems (41%), unclear or underwhelming career pathing (40%), too much time on low-value work (40%),** and a **lack of customer data (26%).**

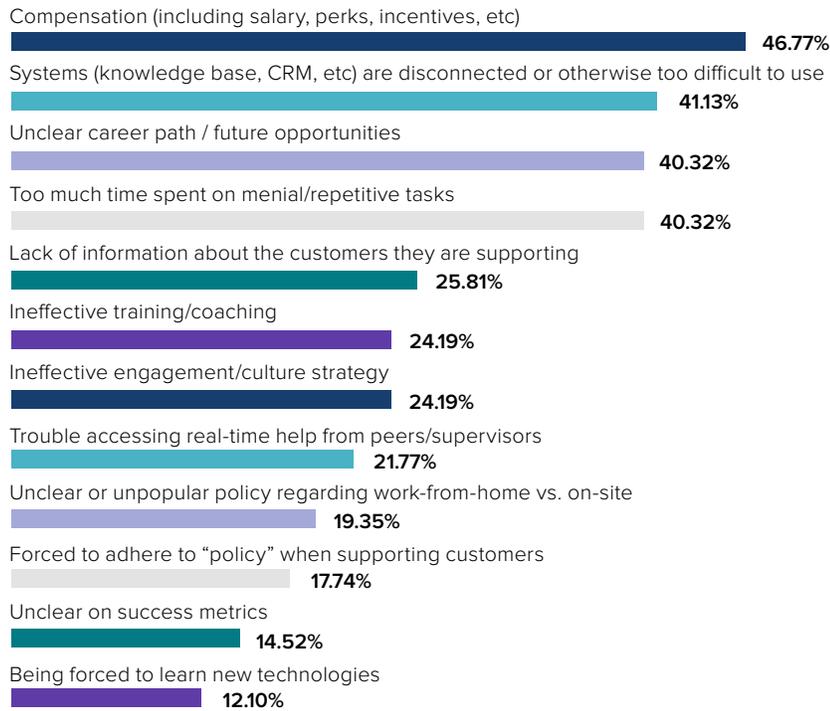
Much like compensation, career pathing is a longstanding challenge that has new significance in the contemporary job market. With time and opportunity to reinvent themselves and pursue "dream careers" in the remote era, employees are less willing to settle for rote "jobs." They increasingly require assurance that the work they put forth today will bring them closer to a lucrative, fulfilling career down the road.

Even with all the talk about "AI handling simple tasks so that humans can focus on complex ones," many contact centers are struggling to define a long-term trajectory for this "high-value" agent. They continue to view frontline contact center work as an expendable "job," and they support and compensate accordingly.

For as much as pay and career pathing impact overall job satisfaction, they may not always have a palpable, day-to-day effect on agent engagement. Factors like agent effort, on the other hand, absolutely do impact the work experience on a daily basis. It is no surprise, therefore, that unsupportive systems and uninspired workflow are compounding agent frustration.

A lack of customer data creates a similar form of frustration. It may also lead to impersonal and hostile customer interactions, which further weaken the agent experience.

## Which of the following are drivers of agent/employee frustration in your organization?





## SCORING THE PRESENT

Metrics are more than *scorecards* for contact centers. They are messages. They reveal what matters most within the customer contact operation, in turn driving everything from agent behavior to technology sourcing.

An effective review of the customer contact industry, therefore, requires an assessment of which metrics rank as top priorities.

For today's customer contact teams, no metrics matter more than those which assess customer satisfaction.

**Satisfaction metrics, such as CSAT, Promoter, and Retention Rate, rank at 4.3/5**, with 0 signifying unimportant and 5 representing extremely important.

The support is unsurprising. For starters, customer satisfaction (and similar concepts like loyalty and advocacy) represent *outcomes*. They are the end result by which all intermediate strategies, decisions, and behaviors are ultimately judged.

Additionally, CCW Digital's Future of the Contact Center Market Study identified customer satisfaction and loyalty as the top ways today's contact centers can generate value

for the business. It makes sense, therefore, to prioritize these metrics when assessing performance.

Other metric assessments are as follows: **4.1 for business metrics like revenue and profit, 3.9 for efficiency metrics like average handle time and speed of answer, 3.9 for resolution metrics like first contact resolution and callback rate, 3.8 for agent experience metrics like employee satisfaction and retention, 3.5 for channel utilization metrics like volume by channel and self-service abandonment, and 3.3 for training metrics like ramp time and transfer rate.**

At the end of the day, *business metrics* are an even more definitive "outcome" than customer satisfaction metrics. Any customer contact function that values CSAT should, therefore, have just as much (if not more) of a vested interest in assessing business impact. The only limitation – and likely the reason why the score is slightly lower – concerns a limitation on autonomy. Customer contact teams may not feel they have as *much* power to drive overall business metrics, which slightly curbs their desire to measure.

Although they have faced some thought leader opposition in recent years, efficiency metrics reign as the most quintessential contact center benchmarks. For all the criticism about encouraging agents to “rush” customers off the phone, such metrics are also invaluable for planning resources and identifying gaps within the operation. That contact centers continue to prioritize these metrics is, as a result, the antithesis of surprising.

It is hard to imagine resolution not ranking as a major priority for today’s customer contact functions. The comparative limitation on the score may simply stem from the difficulty in assessing resolution through metrics. Even a popular measure like FCR comes with a huge risk of ambiguity.

As agent retention takes center stage in today’s challenging labor market, the customer contact community should be wholeheartedly embracing agent experience metrics. Like resolution, the only limitation likely comes from familiarity. It may be easy to assess *outcomes* like retention rate and turnover, but what about intermediate forces like “agent effort” or day-to-day sentiment?

As they may not directly assess outcomes, it is easy to understand why channel utilization and agent training rank as comparatively lower priorities. Both should, however, be gaining traction in the modern climate.

### How important are the following metric categories to your contact center/customer contact function?

- Not at all important
- Slightly important
- Somewhat important
- Very important
- Extremely important
- Do not measure

Customer satisfaction metrics (CSAT, NPS, Retention Rate, etc)



Efficiency metrics (AHT, ASA, Service Level, Call Count, Volume, Availability, Adherence, etc)



Resolution & outcome metrics (FCR, Callback Rate, Conversions, Proactive Resolution, Accuracy, etc)



Channel utilization metrics (Volume by channel, Escalation rates, Abandonment, Containment, Self-Service utilization, etc)



Agent experience metrics (Employee Satisfaction, Retention/Tenure/Attrition, etc)



Training & development metrics (Ramp time, Transfer rate, etc)



Business metrics (Revenue, Profit, etc)



With companies focusing so heavily on driving additional digital engagement, understanding behaviors within key channels should be top-of-mind. Training efficacy, meanwhile, will let companies know whether their development plans are holding up as they embrace remote work and other modern, more flexible employee models.

## RATING THE CHANNELS

A key tenet of omnichannel is that customers should not feel as if they are sacrificing quality, let alone dealing with a separate brand, as they engage in different channels.

This notion has, however, historically represented a pipe dream. Few brands are delivering a truly stellar experience across their full mix of voice-based and digital channels.

That incongruous reality remains intact.

**Live agent phone engagement, the most traditional “call center” option, remains the most effective. Companies score their success at 4.1/5.**

On the one hand, phone is subject to ample ridicule. It is home to some of the most common pain points like hold times. It is also, as far as some generations are concerned, an antiquated medium. Despite all those realities, it remains the most proven channel and the one in which companies have cultivated the most experience and made the biggest investments. Its comparative success is hardly a mystery.

Although they are technically “digital” channels, email and chat are comparatively familiar and “conventional” for most customer contact teams. **With scores of 3.6/5, their above-average level of performance is also unsurprising.**

The trouble ultimately remains with more “modern” alternatives. Video ranks as the worst option, with brands self-assessing performance at a mere 3.0/5. Passive web self-service (3.0/5), active web self-service (3.1/5), messaging (3.3/5), and social media (3.4/5) also lag behind the more established channels.

IVR is the only familiar channel with a comparatively low score - a mere 3.2/5. Its modest score is nonetheless predictable, given that companies have notoriously struggled to develop customer-centric IVR experiences.

Clearly, the digital transformation has not *fully* taken flight. The idea of an omnichannel is not *fully* a reality. There is, however, a silver lining in that none of the scores are particularly bad. There may be discrepancies in quality, but companies are increasingly confident that all channels can deliver a baseline of acceptability.

The goal moving forward will be to transform fairly acceptable interactions in most touch points into exceptional ones across all.

### Rate the quality of your customer experience in the following contact channels

- Very poor
- Somewhat poor
- Neither poor nor strong
- Somewhat strong
- Very strong
- Do not offer and/or measure this channel

Phone (live agent)



0.81%

Phone (IVR)



4.13%

Chat (real-time, agent-led)



1.63%

Messaging (asynchronous, agent-led)



1.68%

Video



3.33%

Email



2.46%

Social media



3.36%

Active web self-service (chatbot, automated text messaging, etc)



4.96%

Passive web self-service (FAQ page, etc)



0.82%



## PREPARING FOR THE FUTURE

What will drive increases in crucial customer-facing metrics? What will make the contact center a more valuable part of the overall organization? What areas of the customer experience are non-negotiable in the quest to demonstrate customer centricity?

For more than two-thirds of companies, the answer comes down to quality control. **Sixty-seven percent (67%) rate accuracy and consistency of communication as a “make or break” component of the customer experience.**

As *accuracy* is more of a foundational quality than a glamorous one, it is easy to understand why 33% of companies did not jump to identify it as a “make or break” piece of the experience. Few customers will go on the record as saying, “You should check out Brand X, they always give you accurate information about their products!”

On the other hand, given that no amount of fresh technology or over-the-top conversation can account for poor, inconsistent information, it is abundantly clear why accuracy ultimately still reigns as the supreme determinant of a successful experience. A wholly accurate and consistent information chain may not spark headlines, but *inaccurate* communication will definitely send customers for the hills.

Other top-ranking “make or break” factors include **personalization (57%), getting the desired (or equitable) resolution (55%), minimal wait time (48%), and a fast support process (48%).**

Although the *mode* of personalization may be changing in the world of digital, low-touch interactions, the spirit remains essential. Brands still feel customers wholeheartedly care about being treated as “people” rather than “numbers.” Digital technology may actually be heightening that expectation, in fact, as it provides customers with a front-row seat to how much data brands are collecting.

For as much as *accuracy* is fundamental, so too is providing a sound resolution. Few customers reach out to brands just to chat; they expect an answer to a question or a solution to a problem. Brands that do not consistently provide the resolution customers want are inherently conceding a lack of customer centricity.

Each year for the past half-decade, CCW Digital’s Consumer Preferences Survey has confirmed “long wait times” and “slow interactions” as two of the most common pain points facing today’s customers. In declaring speed a “make or break” component of the customer experience, brands are signifying their commitment to resolving this issue.

The key, of course, will be to actually take steps to reduce wait times and improve conversational efficiency. CCW Digital research has not confirmed much success; wait times actually *increased* from 2020 to 2021, even though brands should have gained more experience using digital channels and managing remote work performance.

### AI AS A PATHWAY TO AGENT PRODUCTIVITY

The customer contact landscape has transformed greatly in recent years, but one thing has remained constant: the connection between *the agent experience* and the *customer experience* remains undeniable.

No contact center can plan for the future, therefore, without considering ways to reduce agent frustration and increase employee productivity. As a class of technology that promises to augment performance and unlock the potential of the human workforce, artificial intelligence solutions will play a pivotal role on this journey.

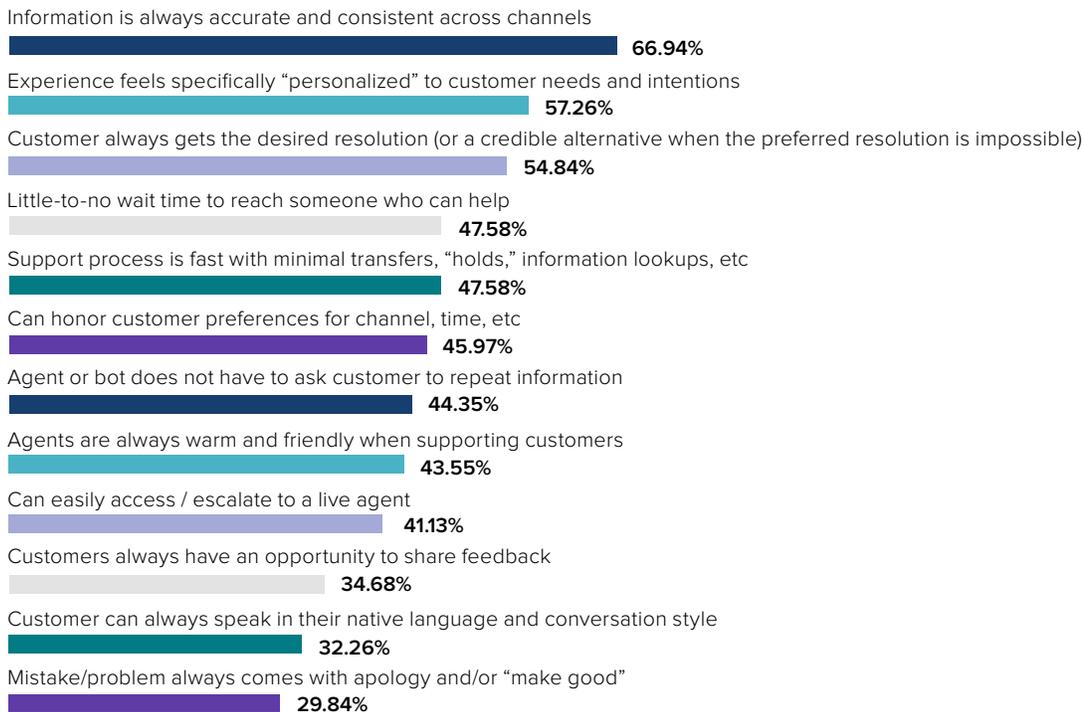
**For 65% of organizations, the priority will be better leveraging AI-driven self-service so that agents can focus on more complex work.** When the majority of customers instinctively turn to chatbots and other self-service tools for issues of low- and even medium

complexity, human agents get to engage in meaningful conversations that bring desired doses of variety, human engagement, and intellectual stimulation. Agents will no longer feel disillusioned or detached from their work, while also contributing more tangible value to the organization. Stronger compensation and brighter career paths will, in turn, become easier to justify.

Other top AI priorities include **improving knowledge access (60%), managing performance in real-time (52%), improving quality of customer data (49%),** and **automating scheduling and workflow (48%).**

As exciting as a shift to more complex work may be, it also introduces a higher degree of difficulty – and a higher standard for performance. Agents will have to engage in more meaningful conversations while addressing more complicated matters; AI tools that streamline knowledge searches and even deliver “next best action” recommendations to agents allow them to demonstrate the requisite focus and expertise. Instead of scrambling over what to say, they will commit wholeheartedly to devising the best way to deliver the support, sales pitch, or information.

### Which do you believe are the “make or break” components of a great customer interaction in 2022?



AI-driven customer intelligence is equally valuable, surfacing details about customer profile, sentiment, and intent that agents can use to productively personalize conversations.

With agents working remotely, performance management technology is more crucial than ever. Supervisors will rely on data – not listening into conversations or looking over shoulders – to evaluate the strengths and weaknesses of their team members.

Real-time performance management is not, however, merely a tool for leadership. Agents themselves benefit by gaining a sense of how they are stacking up against peers whom they can no longer see in the physical office. Additionally, real-time visibility into how their effort is contributing to the customer experience provides a sense of purpose today’s employees increasingly demand.

Automated workflow solutions simplify the process of managing a distributed workforce. They also help companies accommodate the more flexible employee models, such as gig work, that are emerging in a post-COVID world.

## A DIGITAL-FIRST FUTURE

If there is one technology conversation topic that rivals artificial intelligence strategy, it is the digital transformation. And as far as the customer contact community is concerned, the talk will continually turn into walk. By 2025, many leaders believe a substantial percentage of interactions will take place exclusively within digital channels.

**Forty-six percent (46%) of companies, in fact, believe at least 60% of interactions will reside entirely in the digital world by 2025. A non-trivial 11% believe 80-100% of customer engagements will be exclusively of the digital variety.**

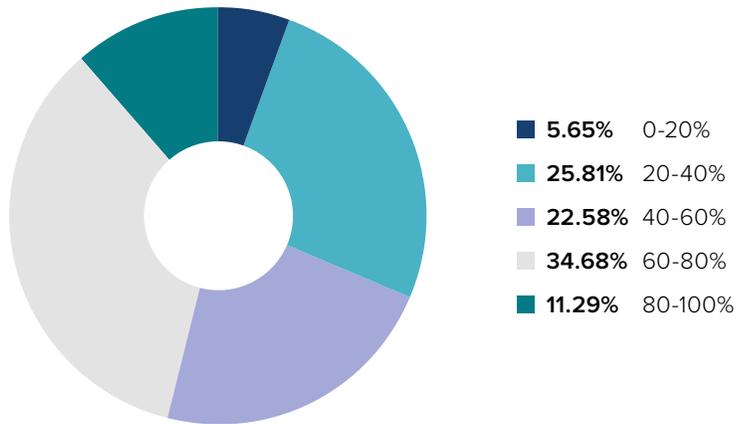
Only 6% are bearish on the proliferation of digital, contending that channels like social, chat, and messaging will contain no more than 20% of conversations.

To put it simply, the phone channel is not on the verge of extinction. Digital, however, is absolutely on the road to prominence.

## As far as your organization is concerned, what are the most urgent ways AI technology should/can improve the agent experience?



**By 2025, what percentage of customer support interactions do you expect to be fully handled in digital channels?**



# PRACTICALITY GUIDE:

CUSTOMER EXPERIENCE CASE  
STUDIES, EXPERT TIPS, AND  
PRACTICAL EXERCISES THAT YOU  
CAN BRING BACK TO THE OFFICE.





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## HOW OPERATIONAL SUPERIORITY CREATES CX PREDICTABILITY

The unpredictable is inevitable. As the past two years have made abundantly clear, business and societal landscapes will change in unexpected ways, leading to dramatic shifts in customer and employee expectations and behaviors.

The inability to perfectly forecast every change does not, however, mean contact centers cannot successfully *anticipate* important trends and developments. It, more importantly, does not mean they cannot *prepare their operations* to swiftly respond and maintain consistent productivity amid even the most dramatic and unexpected marketplace shakeups.

When contact centers combine the right people with the best technology and the savviest strategic vision, they ensure that change does not automatically become a challenge. They ensure that marketplace evolution does

not become an excuse for falling behind. They, instead, weather all potential storms and leave no doubt about their commitment to empowering employees to wow customers.

What does it take to achieve this degree of operational flexibility, continuity, and preparation? How can companies ensure they are never caught off-guard by even the most dramatic shifts in business climates or customer demands? This briefing provides the answers.

## WHAT LEAVES CUSTOMER CONTACT TEAMS UNPREPARED?

On the sports field, we learn that practice makes perfect. In the boardroom, we celebrate the importance of strategic planning. Why, then, do so many customer contact teams find themselves unprepared for even slight shifts in contact volume or customer preference, let alone paradigm transformations?

Many succumb to some common pitfalls.

## Inadequate Approach to Data

A whopping 89% of companies acknowledge flaws in their customer intelligence programs, with most citing challenges properly unifying and analyzing data, as well as actioning the data they are able to analyze.

Flawed strategy compounds the impact of inadequate analytics solutions. Some companies forecast based on the wrong input variables, resulting in inaccurate assessments of how customer volume and demand will change in the face of certain events. Others focus exclusively on outcome metrics rather than root causes, leaving them unable to recognize and pre-empt the experiential pain points that may trigger changes in customer sentiment or volume.

“Volume surges occur for a variety of reasons, but when planning is usually at fault, common pitfalls include, using the wrong variables for key inputs, poor alignment between marketing programs and forecasting teams, or failure to evaluate historical trends. Common incorrect variables include average handle time, shrinkage, or attrition. Ideal numbers are sometimes used vs historical run rates which distort trends.” - David Afdahl, Chief Operating Officer, ibex

## Fragmented Customer Engagement Effort

A problem for nearly all facets of the customer contact operation, functional silos and systemic fragmentation are particularly hazardous when it comes to preparation and predictability.

Without transparency into what other teams are doing, no department can properly assess the impact on contact volume or workflow. The most obvious example involves an upcoming marketing effort; without fully understanding the call-to-action, sales and customer support teams cannot sufficiently prepare for the influx of purchases and inquiries.

“One common pitfall involves a lack of communication or awareness of marketing initiatives that drive volume not be shared with forecasting teams. This is very common and drives surges in volume that have not been proactively staffed for.” - David Afdahl, Chief Operating Officer, ibex

Such fragmentation may also emerge at the channel level; if the phone support team is not aware of an issue involving the chatbot, it will neither be prepared for the volume nor the sentiment of the many angry customers

who need to escalate. The surge will overwhelm the phone team, leading to longer wait times and inferior conversations.

## Unsuccessful Personnel Management

People are the heart of the customer contact operation, and their impact is particularly important when it comes to achieving operational consistency.

For starters, any massive variation in terms of employee competency (whether the product of incongruous training or ineffective recruiting) may translate into inconsistent customer experiences. If the “good” agents manage phone calls from 9AM-5PM, but a specific event prompts many customers to live chat at 3AM, this wave of customers may receive suboptimal care.

Companies with inflexible work experiences – a commonality even in the post-COVID world – exacerbate these challenges. Without accommodating those who wish to work on their own terms, in their own homes, contact centers limit their ability to attract the right talent in the era of gig work. Worse, they limit their ability to swiftly ramp up resources in the event of an unexpected volume surge.

Another challenge concerns employee empowerment. Those contact centers that train agents to rigidly follow scripts, as opposed to enthusiastically pursuing customer centricity, tie the hands of employees who have to address unexpected or unusual requests.

Because these agents are so focused on *reading* scripts, they may also struggle to appropriately *listen* to customers. As a result, they may fail to read tea leaves about shifts in customer sentiment and demands, further limiting their (and their companies’) ability to anticipate and mitigate the impact of change.

## Ineffective Use of Technology

The empowerment issue is not merely one of philosophy. It also concerns technology.

The typical contact center imposes considerable operational friction on its team members. Analytics and knowledge platforms are lacking, automation initiatives are insufficient, and enterprise systems are fragmented. The time agents spend navigating these high-effort systems is time they cannot spend understanding customers, adapting to unexpected issues, or providing the high-caliber, human support that maintains brand credibility in trust even in the most unusual and uncomfortable of events.

“Often, agents have to use multiple tools and bounce from system to system which drives frustration for them in addition to performance issues. This also sometimes increases handle time which in turn can decrease customer experience.” - David Afdahl, Chief Operating Officer, ibex

## KEYS TO A SUPERIOR CUSTOMER CONTACT OPERATION

If operational shortcomings and misfires are the reason so many contact centers struggle in the face of change, then there is a simple answer for maintaining continuity, productivity, and customer centricity: *achieving operational superiority*.

Indeed, the best contact centers look beyond *today's needs, challenges and limitations* and construct operations that are geared toward long-term principles and outcomes. This simultaneously grants them the vision and flexibility needed to achieve their ultimate customer and employee experience goals no matter what superficial or significant changes come their way.

There are several keys to achieving this degree of operational superiority.

### Prioritize a Frictionless Experience for Customers and Agents

If customers and companies have to jump through hoops just to handle their most predictable and routine tasks, the experience is doomed to fail when new, highly emotional challenges emerge.

Reducing friction for customers and agents, therefore, represents a pivotal step to achieving CX predictability and consistency.

“Creating a predictive customer experience starts by looking at the experience through two different lenses; both the agent and the customer. Complexity and friction exist in both those roles and understanding those by function allows for a more seamless customer experience by reducing customer effort as well as a more predictive, stable experience by reducing agent effort and volatility.” - David Afdahl, Chief Operating Officer, ibex

For starters, the easier the journey (and the better the self-service options), the quicker customers can reach the agent or bot best-suited for addressing their issue in the most customer-centric manner possible. Even if the inquiry or process deviates slightly from what is typical, the customer will still be receiving stellar service – and thus still feel a sense of consistency.

By helping customers quickly move into the “interaction” phase of the journey, companies also elevate the quality of intelligence they gather. They will learn what the customer is truly thinking, and truly intending to achieve which helps them better anticipate needs and better design journeys. Knowing what the customer wants to achieve when interacting with an agent is far more actionable than knowing that the customer hates the process of reaching an agent.

Frictionless employee experiences, meanwhile, allow agents to focus on solving problems rather than navigating cumbersome systems and processes. They will be more attentive to customer needs, while also reducing the long wait times and tedious questioning that tend to be red flags of an unprepared, overwhelmed contact center function.

### Build a Legitimately Omnichannel Operation

When it comes to achieving consistency and predictability, more options mean more opportunities. The key, of course, is that the options have to be good.

For the customer contact operation, this is a call to create a legitimately omnichannel experience. When customers can successfully engage in all channels, and successfully move between channels when necessary, companies can “smooth out” volume spikes. Viable proactive messaging, chat bot, or live chat offerings, for example, help companies reduce the burden of a sudden spike in phone calls.

“Once you are able to understand which interaction types have low effort and low volatility they are what should be targeted for self service and proactive notification. Being able to predict that a user will have a billing question a certain amount of days after a price change and proactively sending an SMS notification, even a short video with details around the increase, reduces customer effort and proactively drives a better experience. There is no shortage of customer data, being able to pinpoint to two or three customer behaviors that will prompt a call or interaction, and then addressing those through proactive outreach is the key driver behind lower churn and higher NPS.” - David Afdahl, Chief Operating Officer, ibex

Not simply about accommodating front-end channel preference, a truly omnichannel operation *also* ensures internal touch points are connected. This grants agents access to a 360-degree view of the customer journey, allowing them to anticipate and identify needs. It also grants them access to a 360-degree support capability, allowing them to seamlessly engage with customers in different channels based on volume and circumstance.

“The key to drive great omnichannel experience upstream and downstream from the call are great technologies. Can the agents easily use their tools to move from one volume channel to another quickly and seamlessly. Often voice, email, and chat are separate before they are merged together for omnichannel support, and they have different systems or tools that they use. If the tools have been easily integrated and aligned, it helps both agent and customer experience.” - David Afdahl, Chief Operating Officer, ibex

### Attract Great Talent Through Flexibility

The right people are essential for delivering a high standard of support. They are also more capable of maintaining that standard even at unusual times, in unfamiliar channels, in unexpected market conditions.

Companies that wholeheartedly commit to flexibility open the door to this pool of powerhouse talent. By supporting remote work, not only by rule but by virtue of integrated systems and modern engagement tactics, companies position themselves to find and keep the most exciting, enthusiastic, and customer-centric talent in the world.

The fact that these agents are working flexibly, moreover, gives the contact center “buffer” in the face of unexpected change. It is far easier to deploy at-home talent when a customer service crisis emerges at 3AM than it is to mobilize a 9-5, on-site, traditional workforce.

### Automate the Right Tasks, With the Right Objectives

A company that successfully *automates* core operational tasks empowers employees to focus not only on “high-value work” but also unexpected work. When unencumbered by the mundane, they can think critically to resolve complex challenges.

Automation is also an asset in the quest for consistency. By processing data or providing information quickly, in the same way, and at scale, companies eliminate the variance or human error that becomes increasingly likely in the face of change or overwhelming volume.

Automating a response to a product recall, for example, ensures that customers do not receive the kind of conflicting or troubling information that creates additional worry, questions, and delays.

Not simply about technology sourcing, automation initiatives also invite businesses to evaluate processes for gaps and inefficiencies. This effort further improves a company’s ability to adapt to change and mitigate risk.

“Use automation initiatives as an opportunity to engage in business process reengineering to ensure your automation is as effective as possible. Broken, inefficient processes don’t take well to automation.” - David Afdahl, Chief Operating Officer, ibex

## THE VALUE OF PREDICTABILITY

By committing to reducing friction, building an omnichannel framework, improving hiring practices, and leveraging automation, companies can achieve predictability in a customer experience landscape notorious for change, challenge, and even chaos.

How can intelligence help companies reach this caliber of operational superiority – and CX predictability? How can such predictability help companies weather the storm of seasonal volume?

These additional resources will provide the answers.

**Webinar | Driving Hypergrowth CX With Business Intelligence**

**eBook | Peak Failure: Fixing Your Seasonal CX**



## CUSTOMERS WANT THE FP3 EXPERIENCE | HERE'S HOW TO DELIVER

There are no *shortcuts* to a great customer experience. Expecting brand interactions to fire on all cylinders, today's customers crave the FP3 experience: one that is frictionless, personalized, predictive, and proactive.

There are, however, clear *solutions* for delivering this caliber of experience at scale – in all contact channels. Combining technology, strategy, and employee engagement, these actions eliminate the pain points and inefficiencies that have for so long reduced customer centricity to an unattainable pipe dream.

What are these solutions? How can contact centers reduce operational bottlenecks, empower employee performance, anticipate customer needs, and deliver stellar conversations at all times, in all touch points?

This briefing provides the answers, before showcasing a real-world success story.

## EMBRACE, DON'T IGNORE, WHAT CUSTOMERS ARE DEMANDING

When designing customer experiences, standout brands account for macroscopic and microscopic considerations. They reduce obvious sources of friction and support universal customer demands, while also tailoring individual moments to specific customer personalities, sentiments, and intentions.

Key macroscopic considerations involve providing customers with enough live agent and self-service options to solve problems of all complexities in their preferred environment and reducing conventional contact center friction like repetitive questioning or limited support hours. Customer-centric companies also encourage feedback throughout the journey – and always close the loop.

“Customers hate the ‘hassle’ of dealing with contact centers. This translates into inconvenient service hours, inefficient contact channels, having to repeat information, escalations, dead ends, and other roadblocks that put the burden on customers to find solutions.” - Sean Erickson, Global Head of TTEC Engage

After designing a holistically valuable, frictionless experience, companies can deploy modern, AI-driven analytics solutions to identify specific customer intentions at all moments of truth. With seamless access to this data, agents can understand unique customer needs, anticipate future preferences, and always deliver tailored and contextually relevant communication.

“Contact center interactions should be personalized, predictive, proactive, and authentic experiences that evoke a positive emotional response. Anything less is not customer-centric. This can be difficult at scale, but the key is to delve into customer data and customer intents to understand why customers interact, anticipate and proactively help them, and in some cases prevent them from having to reach out at all.” - Sean Erickson, TTEC

## EMPOWER AGENTS WHO WILL ENTHUSIASTICALLY DELIVER

Like customers, today’s employees are seeking frictionless, personalized, predictive, and proactive experiences. Upon meeting this agent experience standard, companies raise their chances of providing stellar customer journeys.

For starters, easy, flexible experiences attract and motivate the best talent. By then personalizing key aspects of the agent experience, including onboarding, coaching, career pathing, and incentivization, companies support these high-caliber agents with ample motivation and ever-evolving skill sets. Agents will always have the ability – and the emotional investment – to deliver experiences that are incredibly simple and immensely helpful for customers.

A key part of this endeavor involves emphasizing the wellness – not just the raw output – of each employee. Employees who receive necessary support for challenging personal and professional issues will gain more trust for and commitment to their supervisors and employers. They will also be in a better state of mind when interacting with customers, leading to more focused, harmonious, and resolute conversations.

“Beyond just increasing wages, companies can make decisions to enhance employee well-being, innovate with tools that simplify the associate workday, provide resources for growth, and most importantly listen to

employees to learn how to continuously improve. Not only will you retain employees, you will also enhance the quality of your contact center programs overall.

“For example, competitive compensation should combine a living wage PLUS meaningful benefits that is commensurate with the stress, productivity expectations, and responsibilities of contact center employment.” - Sean Erickson, TTEC

Companies that *anticipate* changes in agent needs and customer behaviors gain the ability to proactively prepare agents with the right data, training, and technology. Agent frustration will subsequently fall, leading to higher retention and more capable experience delivery. Not simply a sign of respect and empathy, a robust voice-of-the-employee program can be a vital tool for predicting future employee experience challenges and expectations.

“Employees want to feel valued and heard, so deploy a voice-of-the-employee program as a central part of company strategy that encompasses all parts of the employee lifecycle. And remember it’s not enough to collect feedback—share actions taken based on feedback so employees know their voice matters and can make a difference to the organization.” - Sean Erickson, TTEC

## USE TECHNOLOGY TO REMOVE INTERNAL FRICTION AND ENHANCE EXPERIENCES

What happens behind the scenes impacts what happens on stage.

Too often, inefficient operational systems and processes are the *cause* of inconvenient, impersonal customer experiences. Agents struggle to access data from different systems or provide support in different channels, leading to slow, cumbersome, impersonal experiences. These agents are barely able to even recognize the customers they are serving, let alone anticipate their needs and proactively tailor experiences.

By automating rote processes and unifying key systems and databases, companies remove this troubling friction. The result will be interactions that are faster, more personal, and more likely to result in solutions that solve current and future customer problems.

“The accelerated need to provide a consistent environment for customers across touchpoints and channels is finally spurring organizations to prioritize targeted cross-channel connections as a form of business resilience and future growth. Nimble cloud-based solutions make this possible.

“When brands use technology to resolve customer issues and make them feel valued with a human touch, they can deliver amazing experiences. The result should always be a more valuable experience for brands and customers alike.” - Sean Erickson, TTEC

Beyond closing existing gaps, technology can also *enhance* the quality and humanity of customer journeys. Modern solutions, for example, help companies deliver multimedia and other interactive experiences at scale. This allows companies to provide a higher caliber of service that appeals to a broader range of customer preferences.

The ability to support video – a futuristic concept that quickly became an everyday communication standard – is especially essential for delivering a simple, supportive, and personalized experience in the modern landscape.

“I think we will see video as a channel start to emerge in B2C environments. We’ve already seen telehealth start to take off, but financial services, retail, travel and other industries will start to take advantage of this new way of communicating. People have been forced to utilize video in their business lives and I believe it is going to now bleed over into how they want to interact in their personal lives. Just as email and chat started as B2B interactions and then transitioned to heavy B2C, so will video.” - Sean Erickson, TTEC

## ADOPT AN INTELLIGENT APPROACH TO AI

Make no mistake, the hype surrounding AI-driven chatbots is wholly justified. Today’s customers have long hoped for the ability to quickly solve problems on their own terms, and the conversational and cognitive capabilities of today’s bots are finally making that caliber of self-service a reality.

AI’s impact is not, however, limited to agent-less interactions. Many of the most powerful use cases concern the internal agent experience and how to empower faster, more contextually relevant performance.

Most notably, the use of AI to automate repetitive and tedious processes enables employees to devote more focus to customer interactions. This allows them to reduce the burden on customers, while better anticipating needs and better tailoring conversations. AI can subsequently *enhance* this capability by arming employees with real-time guidance on specific interactions.

One particularly compelling AI use case involves training; by providing access to dynamic, real-time simulations, leading AI tools help new *and* veteran agents perfect their skills and prepare for real-world engagements, regardless of the device they are using or the location at which they are working. These agents will be more capable of using enterprise systems, identifying valuable resolutions, and meaningfully connecting with customers.

“In the back-office, AI and automation streamline information verification and processing to reduce backlogs, so customers get answers and information more quickly and easily. AI-driven training, like TTEC’s award winning RealPlay bot allows associates to accelerate their optimal performance from the very beginning and throughout their career.” - Sean Erickson, TTEC

AI also directly (by virtue of learning from past interactions) and indirectly (by virtue of asking companies to constantly rethink and re-prioritize their processes) fuels continuous improvement, an absolute necessity for competing on the customer experience.

## WINDOW TO SUCCESS: EMPOWERED EMPLOYEES CREATE HAPPY CUSTOMERS

A clear theme exists across the aforementioned steps to success: it takes an empowering approach to customer contact operation – particularly when it comes to agent engagement and performance – in order to deliver a stellar, FP3 customer experience.

This theme does not appear coincidentally; it truly is the *foundation* of a successful contact center transformation. Any bottleneck that serves to limit an agent’s ability to perform, let alone spur their enthusiasm to delight customers, will trickle down in the form of a slower, less personal, less satisfying interaction.

On the other hand, efforts that boost agent engagement and competency will lead to happier contact center environments *and* stronger outcomes for customers. An example success story follows.

**Company:** Leading communications company

**Challenge:** When a major telecommunications firm merged three lines of business into one, customer support was inconsistent, employees struggled to navigate disparate systems and processes, and new hire attrition was rising.

**Solution & Result:** We leveraged TTEC's award-winning RealPlay Bot to accelerate the training and learning process as part of a demand-based curriculum. The RealPlay Bot simulates real-world customer scenarios and provides automatic feedback allowing employees to practice their skills and gain confidence quickly and conveniently.

Results:

- 58% attrition improvement rate
- +5% FCR
- 6% efficiency improvement



## IT'S TIME TO RETHINK AGENT EXPERIENCES | HERE ARE 4 STEPS TO SUCCESS

Research consistently confirms that customers *want it all* when it comes to their brand experiences. They demand interactions that are fast, frictionless, highly personalized, emotionally resonant.

Agents, too, are increasingly unrelenting in their demands and expectations. In addition to pursuing competitive compensation, clearer growth opportunities, and flexible employment models, agents seek an empowering day-to-day experience. The disconnected systems, obsolete equipment, bureaucratic processes, and robotic training curricula that were once stereotypical of the contact center are no longer tolerable.

Thanks to the state of the labor market, employees have more power than ever to make these demands. While spurring the proliferation of remote work opportunities,

COVID-19 also prompted many employees to re-evaluate their self-worth and career ambitions. As a result, agents are less likely to take a mediocre job just to have a job – they know they can look all over the country, if not the world, to find an employer worthy of their commitment.

This landscape is clearly intimidating to many contact center leaders; as the Market Study reveals, a whopping 62% view the current labor market as a major challenge. But rather than shying away from the evolving landscape, the best brands will embrace the opportunity to elevate their agent experiences. By building operations that attract and empower the world's best talent, they can ultimately deliver satisfying "human" experiences for customers.

This briefing will reveal strategies and technologies for elevating the agent experience at a time when the stakes have never been greater.

## STEP #1 | EMBRACE THE CONTACT CENTER AGENT'S TRANSFORMATION FROM "SCRIPT READER" INTO "COMPLEX ENGAGEMENT CONSULTANT"

For decades, contact center leaders have trumpeted the pivotal role employees play in driving great customer experiences. For the past several years, they have discussed how the rise of AI and digital self-service options will shift agents to more complex work.

"Jabra views agents as communication professionals who increasingly take care of more complex tasks given the rise of AI. In addition, they can convey the more human aspects of empathy, passion and excitement for a product or service while relating to customers." Vern Fernandez, Senior Manager of Contact Center Excellence, Jabra

Despite all the talk about the evolving role of the agent, many contact centers have not actually transformed their thinking. They continue to treat agents as expendable script readers, and they pay, train, engage, and support accordingly. Given the unprecedented height of employee demands, this approach prevents contact centers from attracting, let alone keeping, the caliber of talent necessary to wow today's customers.

The kicker is that today's agents are not even extravagant in their demands. They just happen to be emphatic about what they do require to succeed.

"According to Jabra's surveys, primary motivators for contact center agents include: 1) higher salaries, bonuses or financial incentives, 2) working from home when they want to, 3) better technology and stable networks to do their job, 4) career paths to move up into the company, and 5) autonomy to solve problems on their own." - Vern Fernandez, Senior Manager of Contact Center Excellence, Jabra

To thrive in today's hypercompetitive landscape, it is imperative for contact centers to embrace agents as high-value, consultative professionals who handle complex work and help customers navigate difficult channels. Upon making this shift, they will be in a better position to recruit and empower elite contact center talent.

- 1) As agents *truly* shift to higher-value interactions, companies can better quantify their impact on the business and make the requisite improvements in compensation.
- 2) Recognizing the unprecedented importance of agents, leading companies will adopt the flexible work models and deliberate career paths that attract high-caliber talent.
- 3) Not wanting to inhibit this pool of talent, they will arm employees with the customer data, knowledge, tools, and strategic empowerment to make customer-centric decisions on the fly.

## STEP #2 | LEVERAGE AI TO IMPROVE AGENT EXPERIENCES AND DRIVE BETTER PERFORMANCE

If transforming agents into consultative customer engagement professionals is the goal, a successful artificial intelligence framework is essential.

For starters, leading companies have to use AI to address simple customer inquiries and automate repetitive processes in order to ensure agents have the time and focus to engage in more valuable work. If agents' dockets are overrun with questions about password resets or call logging requirements, the prospect of them engaging in complex conversations and solving challenging issues will remain a pipe dream.

Upon achieving the optimal technology-human workflow balance, successful contact centers will then deploy AI to help agents better perform their more complex work. This includes using AI analytics to surface actionable insights, using agent assist solutions to surface essential knowledge content at key moments of truth, using AI-driven coaching technology to help with training, onboarding, and continuous development, using AI-powered translation to help customers and agents seamlessly communicate in all languages, and using AI-backed equipment to yield clearer calls even in suboptimal environments.

The beauty of AI technology is that it learns from interactions and processes and gets better over time. Agents can actually assist in this process by scoring automated interactions and sharing feedback about the tools.

As AI solutions begin to help agents focus more intently on complex work, successful companies will adjust their training and performance metrics to prepare agents for the more human and emotional parts of their job.

“Taking it from the human perspective first, soft skills like empathy, understanding, trust, balancing challenge with support in the workplace, inspiring competence and ensuring relevance ... these are all skills that require practice and rehearsal at times.” - Vern Fernandez, Jabra

### STEP #3 | RECOGNIZE FLEXIBLE WORK AS A NECESSITY, NOT A CONTINGENCY

On the one hand, the past two years have proven the viability of remote work. They have also conditioned employees to *expect* remote, gig, and other flexible opportunities.

On the other hand, not all companies are “all in” on the principle. Many continue to approach remote and hybrid work as suitable stop-gaps during uncertain times, as opposed to default models for the future. Without making that commitment, and revising culture, peer engagement, workflow, and metrics for the remote world, they stand no chance of meaningfully engaging and retaining the best talent that has come to expect it.

Equally importantly, they do not provide the requisite support for remote employees. They are not adapting their training models and engagement strategies to a world in which the best talent will not be inside the physical contact center. They are not arming their at-home agents with seamless access to cloud-based systems for accessing customer data and providing omnichannel support.

They are also not providing agents with the physical equipment to deliver high-quality interactions regardless of device or work environment.

“Jabra surveyed 1033 contact center professionals in December of 2020 and found that agents, globally, would like to work from home 3.2 days of the week. Contact center managers must figure out how to make this work in order to attract and retain talent. Noise at home or distractions in the workplace have always been issues of concern to the customer experience, but even more so in unpredictable home environments where important family needs must be met as well for example. The need for real-

time coaching is increasing and the need to obtain just-in-time knowledge to resolve customer questions on the first call also depends on technology that enables agents with information.” - Vern Fernandez, Jabra

The best companies directly address these needs by working to offer commendable, not merely acceptable, service from remote employees.

“From a technology perspective, agents can benefit from using professional tools including their laptops, headsets, call center software, real-time sentiment analysis, gamification and anything that makes their job easier and more comfortable. The ability to hear conversations and communicate with clarity, especially via voice for those complex calls, reduces mental strain and provides more focus to resolve problems on the first call.” - Vern Fernandez, Jabra

### STEP #4 | RAISE THE BAR ON INTERACTION QUALITY TO CREATE HAPPY, PRODUCTIVE AGENTS AND SATISFIED, LOYAL CUSTOMERS

A company can make a legitimate commitment to customer centricity and put immensely talented employees on the front lines. This effort is for naught, however, if the employees cannot engage in clear, high-quality interactions with customers.

Always a concern, interaction quality is especially important given the variables that exist in the era of remote work. Whereas companies have insight into and control over the telephony, internet speeds, and background noise at a physical contact center, they cannot guarantee all agents will be in a quiet, comfortable, connection-friendly environment. In fact, they can probably be certain that some agents *will* be in highly distracting homes with inconsistent Internet connectivity.

Customer-centric companies cannot allow these variables to impact call quality. Beyond communicating an unfavorable brand message, connection issues will frustrate agents and prevent them from properly understanding and supporting customers’ immediate needs. Poor audio quality also jeopardizes the ability to gather accurate data, which in turn jeopardizes the ability to intelligently automate critical parts of the operation.

“Artificial Intelligence depends on voice being a clear source of data no matter where the agent works. Noise cancellation in the microphone is of utmost importance, enabling applications. For instance, speech-to-text and agent assist via keyword searches can enable knowledge to be delivered to the agent in real-time. Call recording, language translation, sentiment analysis and biometric authentication are all enabled by clean data.” - Vern Fernandez, Jabra

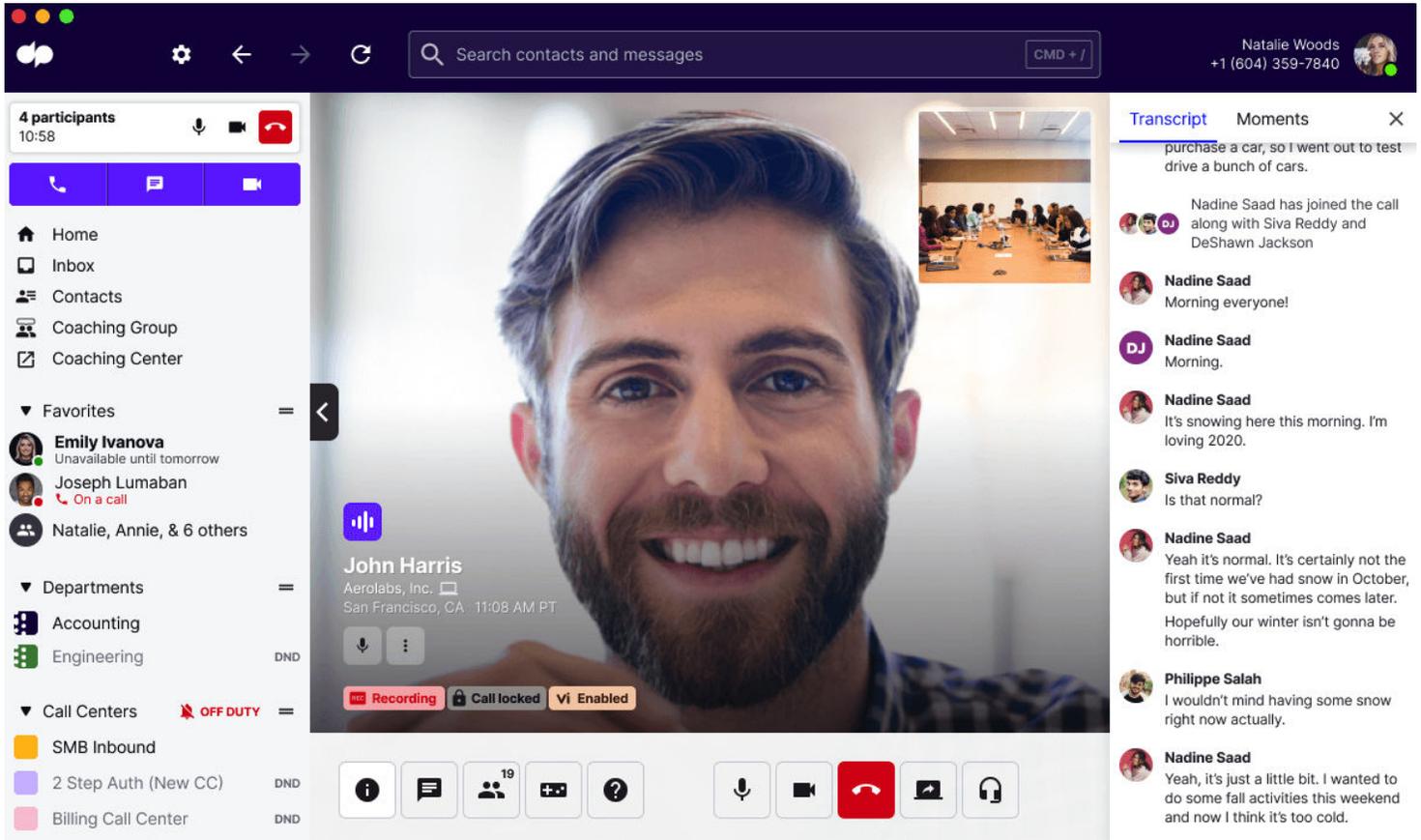
With live phone support remaining a centerpiece of most customer contact operations, investing in modern, high-quality headsets is an essential step for success.

Not simply adept at canceling background noise and elevating voice quality, modern headsets feature intelligent capabilities that help manage performance, optimize workflow, and improve customer and agent experiences.

“At Jabra, certain headsets, like the Engage 50, have special chipsets that can produce or receive data in order to improve customer experiences. Our most advanced headsets can reveal: 1) decibel levels in the agent environment, 2) share of conversation including silence and crosstalk when agents and customers talk over each other, 3) agent status via customizable, multicolored lights on the headsets themselves to indicate whether agents are busy, on-chat, off queue, available, etc., 4) mute times to understand gaps in knowledge or levels of distraction, 5) microphone positioning to ensure best noise cancellation and data for speech-to-text and other applications enabled through voice and artificial intelligence.” - Vern Fernandez, Jabra

Real-time data can empower coaching, call assist, and gamification, leading to significant boosts in operational performance. It also provides *supervisors* with critical insight into call quality, enabling them to identify and address issues with agents’ work environments.

“Using information about decibel levels, supervisors can understand when noise happens in an agent’s environment and route calls accordingly...even if this involves outsourced contact center agents. Actionable intelligence on headset data is now being deployed via CRM and monitoring applications or via system integrators who consolidate data from multiple sources, including the headset. Ultimately, the goal is to create better agent and customer experiences while also improving upon contact center KPIs.” - Vern Fernandez, Jabra



## DIALPAD SUPERCHARGES INFOTRACK’S CONTACT CENTER IN THE CLOUD

When businesses move their **contact centers to the cloud**, they need to know their agents will be able to continue providing excellent service to their customers at all times. At the start of the COVID-19 pandemic, as businesses began moving to a work-from-home and work-from-anywhere style, it became all the more necessary to ensure a swift and smooth transition.

“Covid accelerated businesses, in particular the call center industry, in terms of utilizing or using the cloud based technology system such as Dialpad we were able to continue working without missing a beat.” -Fernan Kalaw | Director of Customer Support

InfoTrack, a legal software solution company, made the transition in the summer of 2020. To better provide important services like court filings, process serving, and litigation support for its customers remotely, they had to move to the cloud. Until that point, the company had used on-premises **business phone systems**, which the IT team kept up and running. But when InfoTrack needed to modernize, it turned to Dialpad.

### WHY DIALPAD?

InfoTrack needed a solution that could let its agents and specialists handle email, chat support, and telephone support. With employees switching to work from home, it was important that the **new contact center solution** could enable all of that from anywhere, regardless of what devices the agents used.

“With Dialpad, we were able to do that, because it’s in the cloud, therefore everyone can take the phone calls for all of our customers wherever they are,” said Fernan Elacio Kalaw, Director of Customer Support at InfoTrack. “That’s the biggest change that happened for InfoTrack.”

Dialpad was able to get InfoTrack set up quickly, so the agents could continue working and assisting customers without any problems. Dialpad also integrates with Salesforce, so it was easy to integrate InfoTrack’s existing CRM solution of choice with Dialpad’s cloud-based **contact center platform**. Not only was the transition seamless, InfoTrack’s team quickly found there were multiple benefits to their new contact center solution.

## BUILT-IN ANALYTICS, RIGHT IN THE DASHBOARD

After switching to Dialpad, the first thing Kalaw noticed was the ease of use. The real-time dashboard, **contact center analytics**, and historical data gathered all the relevant information in a clear and coherent form, providing a solid overview of the contact center’s operations.

For instance, the heatmaps feature was particularly helpful for Kalaw and his team, showing a clear chart of when call volumes peak throughout the day:

### Heatmaps

Call Volume    Answer Times

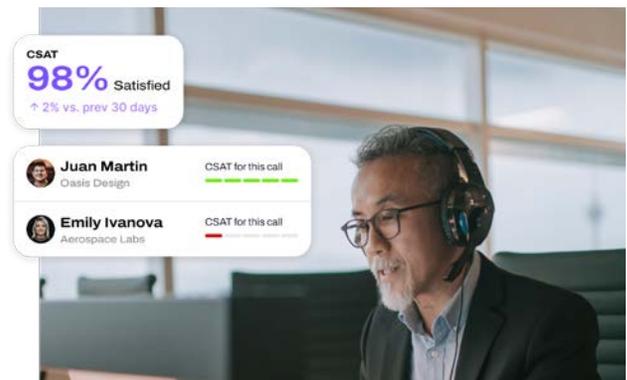


With it, InfoTrack could easily do a staffing analysis to determine when they needed more agents on call, without even needing a formal workforce management application.

## VOICE INTELLIGENCE (VI): WHAT THEY DIDN'T KNOW THEY NEEDED

But maybe the biggest benefit was the power of **Dialpad's Voice Intelligence (Vi) technology**. Both admins and agents alike gained new insights and assistance from Vi which helped with training, agent performance, and overall customer satisfaction.

Vi came built into **Dialpad Ai Contact Center**, and allowed InfoTrack supervisors to perform their own quality management. It automatically creates transcripts in real time, which supervisors can scan—as the calls are happening:



The transcripts are included in **Call Summaries**, along with highlights and action items, and emailed automatically to supervisors after calls end to help them discover teachable moments—without needing to listen through entire calls.

On the agent side, Vi helps keep agents answer tricky questions with **Real-Time Assist** cards, which supervisors can customize with tailored notes on specific topics and set to trigger automatically when certain keywords are spoken on calls.

## HAPPY DIALING

Thanks to Dialpad, InfoTrack's contact center team became better equipped, informed, and empowered to assist customers, no matter where the agents are working from.

Although the pandemic necessitated a sudden shift to a remote working environment, InfoTrack made that transition easily with Dialpad. Not only did InfoTrack's contact center team manage to move to the cloud quickly, with minimal setup, but Dialpad's platform has also enabled them to work more efficiently and provide even better service.

"There are only a few solutions out there that could handle this, and I'm so glad we ended up with the best because it provides us with all of the flexibility and solutions we needed to provide excellent customer support remotely." -Fernan Kalaw | Director of Customer Support

## APPENDIX



-  **Preparing for Contact Center Agent Shortages in 2022**
-  **The Definitive Guide to Conversational AI**



-  **Designing Omnichannel Customer Experience That Actually Works**
-  **Optimizing Channels for Customer Support**



-  **How Exactly Can AI Give Contact Center Agents Superpowers?**
-  **Contact Center Playbook**

## 2022 EDITORIAL CALENDAR

### JANUARY

**State Of Contact Center Technology**



### FEBRUARY

**Strategic Planning For CX Operations**

February 9-11, 2022

### MARCH

**Customer Contact Industry Review**



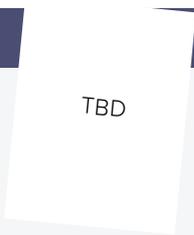
### APRIL

**State Of Contact Center Technology**

April 6-8, 2022

### JUNE

**Customer Experience Trends, Challenges & Opportunities**



### MAY

**New Standards For Customer Contact Performance**

May 25-27, 2022

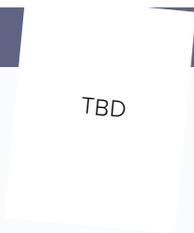
### JULY

**Modernizing Service Experiences With AI & Digital**

July 20-22, 2022

### AUGUST

**Modernizing Service Experiences With AI & Digital**



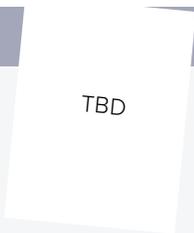
### SEPTEMBER

**Customer Experience Trends, Challenges And Innovations**

September 14-16, 2022

### OCTOBER

**Customer Contact Intelligence & Analytics**



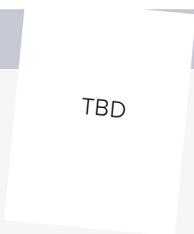
### OCTOBER

**Business Continuity 2.0**

October 26-28, 2022

### NOVEMBER

**Future Of The Contact Center: A Forecast**



### DECEMBER

**Future Of The Contact Center: A Forecast**

December 14-16, 2022

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