

## Getting the most out of your front office!

What is your dream contact centre? Consumers place 'speed of query resolution' above all other factors when ranking a customer service experience according to recent survey conducted by call centres.net. So why is it that in 50% of contact centres, an agent has to work their way through 3-5 different applications on their desktop to service a single customer issue? And it's not just customer service, in sales based call centres, agents can typically spend 10-40% of their time managing data, instead of interacting with customers. This paper discusses how simple changes to the agent desktop can dramatically improve the customer experience and reduce inefficiencies, without needing to replace existing call centre technology and applications..

### 1. Take the scenario

A customer – let's call her Jane – phones a contact centre to request a change in her broadband service. She is connected through to an IVR menu; she enters her account number as prompted then, after a 3 stage menu, chooses 'provisioning' and is connected to an agent – let's call him Peter. Peter listens to Jane's query, opens his customer database and goes through the security process to identify Jane. This goes well; Peter diagnoses the precise nature of Jane's query and he reassures her that he will be able to resolve it rapidly.

At this point Jane is happy about how her call is progressing. Then Peter starts opening databases; it could be the order history database, the accounts database, the marketing database, the service history database, or any one of the many databases on which the company stores information. Each one takes a little while to open; it takes Peter a few moments to locate the information he needs and then he needs to cross-reference that with information on another database.

In sales based call centres, agents can typically spend 10-40% of their time managing lead data or trying to extract the information they need from various databases

Peter apologises to Jane for the time it is taking and she is patient. Eventually Peter realises that she is connected on a different system and he must pass her to an alternative department to resolve the issue. She is put on hold for several minutes before reaching the next department. They ask Jane for her account number; she explains she has already provided this information. The agent politely explains that this was a different department running on a different system so she needs to give her number and go through security again. She explains the nature of her query; the agent is unable to locate any notes or client history from the previous agent.

Eventually, after inputting her details, he locates her account. He explains that he can put in an order for an engineer but she must be patient whilst he logs into the provisioning system. Unfortunately he is unable to allocate her time slot because he cannot access the engineers' scheduling system; she will have to wait for a letter he explains, which will provide her with a date and, no he cannot specify a time.

Then the agent explains that he must transfer her to payments where the order can be processed as he cannot deal with it as he cannot access the billing system. Jane is put on hold and after several minutes she has to leave for work. The issue is unresolved; Jane is disappointed and, while the agents log their calls into various databases, a queue of customers begins to build.

### The alternative scenario...

Jane calls up a contact centre. Her call is identified by CLI (Caller Line Identification) and she is automatically routed to the appropriate agent to deal with her call. A screen pop provides the agent with a full call history and he asks her the nature of her call. She requests a service provision. He enters this in a tab on his desktop and a prompt tells him to ask her when this would be convenient; another screen pop provides him with a real-time complete schedule for engineer availability over the next 24 hours. Once confirmed, he actions the service provision which takes seconds. Another prompt provides the agent with details of service upgrade options and current offers. Jane is delighted and signs up for an upgrade. Payment requests and details pop through to the agent's screen and the call is completed within minutes. A job request and the customer details are automatically sent to the PDA of the engineer in the field and he completes the job later that day. The job details and a customer satisfaction survey are automatically sent from his PDA to the central databases.

## 2. The Front Office Issue

Contact centres are often awash with new technology: ACD; CRM; IVR; call recording; sales order processing; credit card security and workflow management. But the lack of integration between these systems means that the benefits that they should bring to the business are not realised. Instead the agents' time is spent manipulating systems and data rather than talking to the customer and resolving their issue. This costs the contact centre money, leads to long queues and frustrated customers.

Similarly, across most verticals, the multiple applications typically required to manage customer calls have rarely been designed for the contact centre environment; agents are expected to use their initiative and prior experience just to follow the flow of conversation. Here are just a few examples of applications used by those agents:

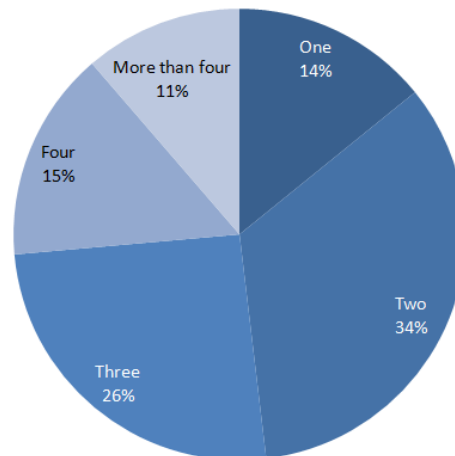
- **Services or Facilities Management:** CRM, workflow, trouble ticketing, ERP (Enterprise Resource Management), inventory, order/purchasing, field maintenance scheduling
- **Telecoms:** CRM, customer accounts, field maintenance booking systems, payment history, credit/debit card systems, email
- **Retail:** CRM, customer history, payment applications, cross-sell/up-sell, stock, inventory, order/purchasing, distribution, supply chain
- **Finance:** CRM, customer accounts, product database, payment systems, email, quotation system (especially in insurance), complaints, sister companies' systems, legal and compliance scripts, insurance claims
- **Outbound Sales:** CRM, call handling, payments, ordering, delivery/scheduling, offers, lead management (from various sources), campaign management.

The situation is often compounded when the contact centre is part of a larger group of companies with differing applications, or if the company has inherited legacy systems from mergers and acquisitions. Alternatively, if an outsourced partner is used for some call handling, their agent teams will work on different systems and application or have very limited access to the client's own systems.

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### How many applications does an agent use within a call?



Source: UK Contact Centre Decision Makers Guide 2010 Contact Babel

As shown in the diagram, over 50% of call centres require an agent to access 3 or more different applications on their desktop and for a businesses to use 10-20 systems and databases to support customer services or campaign operations. Agents have to manually navigate their way around these multiple systems, with limited guidance, to complete a request. Customers become frustrated, not only due to the length of time taken for a call, but also with the errors that creep in as agents, unsurprisingly, forget to complete all actions correctly.

But this is not the end of the problem; a customer call will typically trigger a service request which must then be provisioned, potentially involving several back office departments and systems. Examples such as initiating or upgrading a maintenance or media service, changing a telephony or utility connection requiring an onsite engineer, sending literature or instructing the warehouse to deliver goods, arranging delivery or manufacture of items. All these types of activity need to be triggered somehow and, if not done automatically during the customer's call, then it has to be done post-call in wrap up; if the agent has to access multiple applications and log into each one, wrap up can be lengthy and error-prone..

According to Contact Babel, an average of 13.5% of an agent's time is spent on post-call wrap up which represents 8 minutes of every agent's working hour. That could be costing up to £2.00 per hour per agent which is a significant waste of resource. In a 50 seat call centre across a year, this is a cost of £200,000 in time alone spent on agents simply juggling databases.

This issue is not unique to customer service focussed contact centres; in sales orientated centres, agents face a similar administrative burden, typically spending 10-40% of their time managing lead data, trying to extract the information they need from various campaign databases, emails or customer history. Even if a CRM system is in place, there is usually no integration with the call or email handling system so, when an incoming call is received, agents must search for customer history and lead information which could be in a variety of places such emails, campaign database and lead sources.

When making outbound calls agents, must juggle between call handling and lead databases. Leads will come in from multiple sources but the lack of integration means that they are usually not de-duped and so time is wasted on unnecessary calls which will only irritate the customer who has been called multiple times. Agents must remember information about available offers and use their initiative to determine cross sell and up sells which would be attractive to the specific customer.

The solution is to re-use existing applications and systems, combining them into a thin layer to create the 'intelligent desktop'.

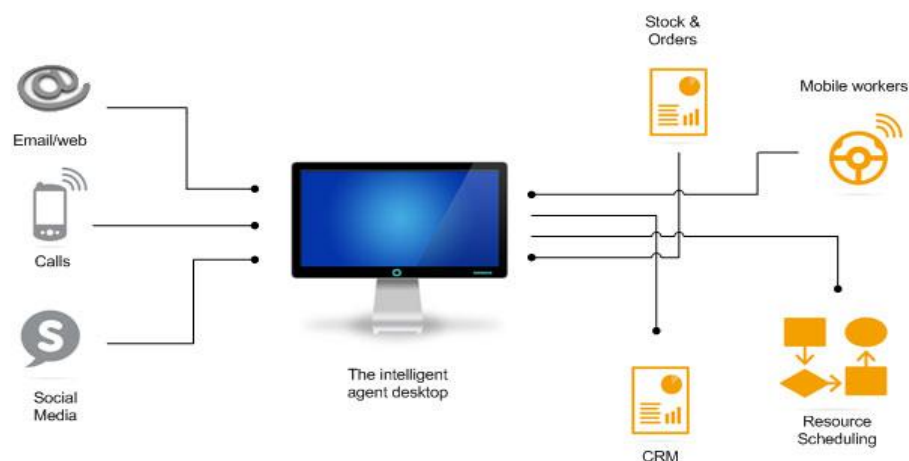
### 3. Getting the agent desktop right

So, how does the business address its dual targets of improving the caller experience and maximising the productivity of its agents?

The ideal solution would be to replace everything in the call centre with one single integrated system. Yet, in reality, each applications or system performs a necessary function and replacing them with a single system is not always realistic. Instead, the appropriate solution is to fuse this functionality in a way which simplifies the agents' tasks. The agent desktop becomes a 'mash-up' of existing systems.

So the answer lies in technology but not in another 'off the shelf' application or software system; the solution is to re-use existing applications and systems, combining them into a thin layer or to create an 'intelligent desktop'. This is essentially a web interface which blends relevant data and processes from the underlying applications, guiding the agent through the call and the steps required to complete any interaction with the customer.

Dynamic applications sit behind this agent interface, adapting to the conversation and requirements to fulfil the customer's need. Data from relevant front and back office and databases is aggregated in real time and presented to the agent at logical points in the customer service process. Similarly, the agent can trigger processes and feed information through to the relevant systems without needing to access them directly.

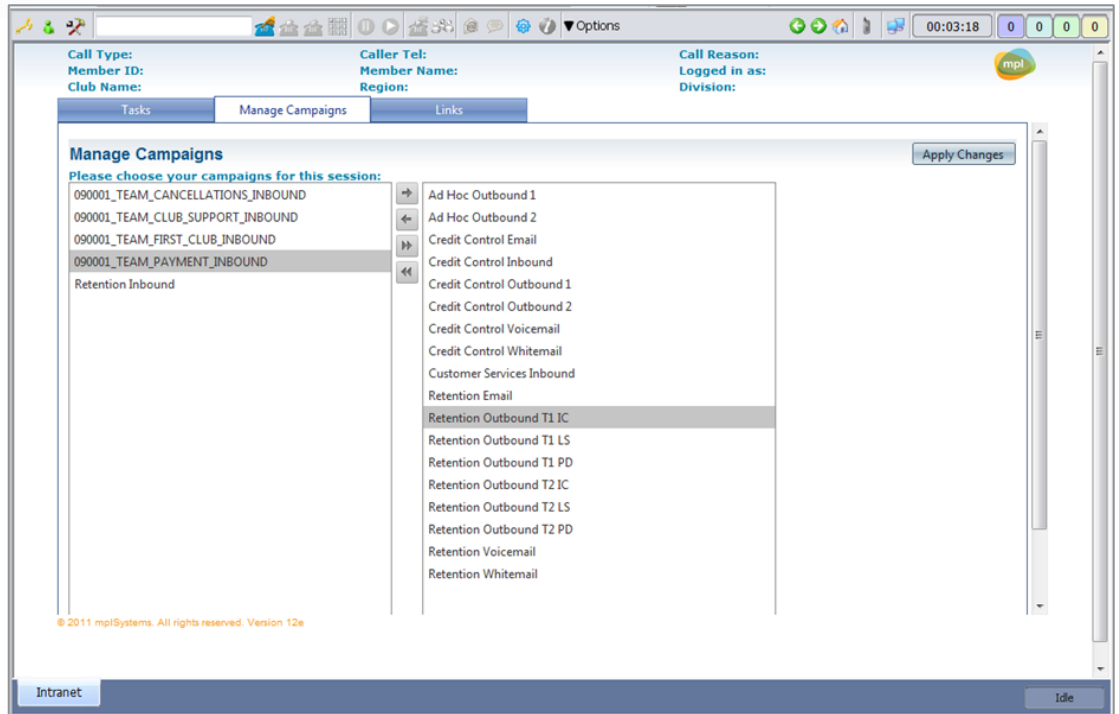


#### A two way process

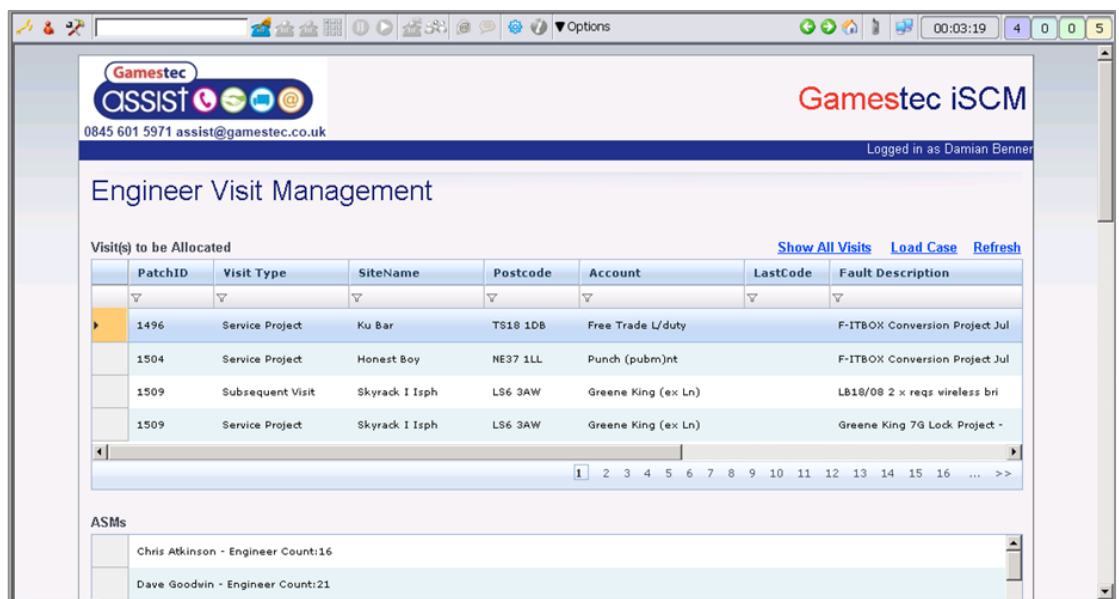
1. PULL: The agent is guided through the call and, at appropriate points, relevant customer data is pulled in from the appropriate application or system. This could be caller history, lead details, details of offers or account information, but it could also be from back office systems for example real time inventory or production status, scheduling or resource planning. The agent would easily be able to determine the status of existing orders and provision and plan new ones. The agent desktop has been developed as a simple web interface to guide the agent
2. PUSH: Communication is two way: the desktop prompts the agent to provision services and action requests; in the background, business rules and workflow processes action the correct back office processes in the appropriate systems. This results in reduced agent wrap up time, a decreases in manual errors and reduction of the load on customer service or back office departments.

The key element is that the intelligent desktop is created specifically for the requirements of the individual organisation

An intelligent agent desktop is not simply another customer relationship or business process management system; it is a complete agent desktop solution. Such systems will typically incorporate call handling and relevant CRM, lead management, workflow and process management functions but the key element is that the intelligent desktop is created specifically for the requirements of the individual organisation and so will guide the agent through the multitude of call types they will receive.



Campaign management desktop



Mobile workforce management desktop

Business specific scripts and procedures guide the agent through stages of the call and prompt actions. Where an organisation manages clients with individual SLAs or procedures, these can be incorporated and account-specific scripts and procedures delivered to the agent.

Leads and contacts can be delivered to agents and outbound calls triggered. Inbound calls can be blended with outbound and the CLI used to bring relevant customer data and script to the agent screen.

#### 4. The Benefits

Effective query resolution was ranked as the top feature of a good call centre service according to a recent UK Gov poll

The two principal drivers for these 'intelligent' agent desktops are, improving the customer experience and raising productivity of call centre staff. Effective query resolution was ranked as the top feature of a good call centre service, according to a recent UK Gov poll. Reducing call handling time and queuing featured amongst the top frustrations in the same poll. By deploying an agent desktop, an issue can be resolved quickly and effectively, call handling time is minimised so queues are dramatically reduced.

Using staff effectively can not only reduce queuing time for customers but also enable call centres to reduce staffing levels, manage peaks more effectively and can enable a growing business to increase the capacity of its contact centre without having to recruit and train new staff.

The benefits of the intelligent desktop model go beyond this and are best illustrated in terms of example applications and real organisation deployments:

1. **Example: A Solution for Sales:** By automating sales management and bringing CRM, call handling and other systems in a simple agent desktop, the agent can focus on engaging with the customer and explain the benefits of a product or service rather than managing data. Data from relevant systems is aggregated in real time and presented to the agent at logical points in the process, guiding them through the sales process. **The** desktop top can be set up to provide the agents with the information they need to up-sell and cross-sell. The system will automatically display offers and relevant historical client data. The offer should be more attractive to the customer because it is relevant to them and well explained.
2. **Managing outbound campaigns: Babcock International** - This outbound contact centre generates leads for apprenticeships and training schemes. Data from various sources are used and agents are presented with constantly changing regional and industry sectors targets. Prior to deployment of an intelligent agent desktop, campaigns were managed manually using spread sheets. Now the simple agent desktop deployed draws in lead data from various sources, incorporates the changing targets and enables the agents to concentrate on interacting with clients and their sector-specific requirements, instead of managing data and targets. The desktop includes sophisticated reporting capabilities and this visibility offers agent motivation as they can immediately see how the campaign is running.  
  
*"As a result of the automation, our success rate has increased by 30-40%, enabling agents to spend time with customers."* Simon Barber, Babcock International
3. **Supporting online sales: FordRetailOnline.co.uk** was launched in 2010 with the aim of making the purchase of a new or used Ford as simple and hassle free as possible. To support the online sales function, a customised agent desktop was created to provide a lead management system and manage contacts, be they web leads, email or calls. Prior to the desktop, leads were handled manually and locating client history and relevant data was slow. With the desktop, a comprehensive database is intimately linked to communications. Screen pops can provide the agent with appropriate customer information during a customer call.



Select the right agent desktop and you will rapidly see a return on your investment

This not only enables agents to provide a rapid and thorough response but frees up the sales team from admin tasks allowing them to focus on communicating with the customer rather than searching for and managing data.

4. **Key Retirement (Key):** Agents handle inbound enquiries and run outbound campaigns using lead data from various sources. De-duping data and managing calling campaigns prior to an intelligent desktop was largely a manual process. An intelligent agent desktop now draws data from different sources, de-dupes it and automates campaign management. As a result, Key has been able to achieve increased productivity and a greater accuracy of call data leading to more targeted marketing campaigns. By bringing together CRM and contact handling, an agent desktop can become self-learning and discover which agents are best at closing certain types of lead and route future leads, calls or emails accordingly.
5. **Call handling and managing workflow:** Balfour Beatty Workplace (BBW) - BBW provides facilities management services to a variety of public and private sector clients across the UK. Integral to their national operations centre (NOC) is a desktop solution for agents which provides call handling, workflow management and integration to asset management tools. When a client calls the NOC, the agent screen is populated with relevant case history based on CLI, a client specific script, any SLAs and business procedures and status of all jobs associated with that client. The agent does not need to access different applications during the course of the call and can quickly deal with the call.
6. **Managing a field based engineering workforce:** Gamestec - The largest gaming and amusement machine operator in the UK, the company deployed a solution which brings together contact centre, customer service and mobile devices into one simple service agent desktop. The desktop draws data from engineers' PDAs in the field and manages scheduling, giving the agent a real time view of engineer status, loading and location without having to get hold of engineers by phone or email. Job allocation is automated, downtime between jobs is minimised and agents can provide the customer with real time updates on the status of their jobs. The desktop provides integration to inventory, workflow and ordering systems to ensure an engineer is equipped when visit is made.
7. **Creating the Universal Agent:** An intelligent desktop empowers the contact centre agent; the agent is not only provided with customer data and the ability to action requests, but the desktop guides the agent through the steps required to complete any interaction with a customer. The desktop essentially gives the agent everything they need to successfully complete a customer interaction within one simple view. A further benefit is that agents can deal with a wider variety of calls, simplifying workforce management and creating the 'Universal Agent' model whereby any agent can deal with any call from any location. This not only leads to increased efficiency in the contact centre but also reduces the loading on other departments, such as customer service and planning. In addition the simple desktop offers the ability to easily and effectively work with call handling partners at busy or out of hours times.

mplsystems, amongst other vendors, provide open platforms built around Web 2 technology to enable a simple agent desktop to be created

## 5. How to implement a simple agent desktop

Intelligent agent desktops are not a new concept, but they are evolving fast. Select the right one and you will, like the Babcock International example, rapidly see a return on your investment; select the wrong one and you could find that it creates more problems than it solves. So, what should you look for?

You should look for one that has been specifically designed for contact centres and provides multimedia contact handling as well as a 'fusing' or 'mash-up' of applications and systems from the front and back office. Obviously it has to be capable of integrating into your existing systems, but you also need to be sure that the desktop can be created around your specific requirements and can be easily adapted as requirements change.

CRM systems termed Business Process Management systems are available and they will perform many of the functions described, but beware of 'off the shelf' systems. They may incorporate many features, but you will invariably have to adapt your organisation and processes to suit the system.

Historically, this has been the issue with many CRM implementations - you can go out and buy 'half a pound of CRM' with lots of bells and whistles, but most features are not required, do not resolve your specific issues and will not fit around your processes and call types. If they do not resolve your organisation's issues, agents will not embrace this application and, instead of improving productivity, they are ignored.

To ensure customisation, many organisations choose to develop their own systems to automate the repetitive data handling tasks that agents face. These projects are handed to the IT departments but, as yet another task on the IT agenda, they tend to join the growing backlog of projects; if projects do go ahead they can drag on and be very expensive.

There is a simpler solution; mplsystems, amongst other vendors, provide open platforms built around Web 2 technology to enable a simple agent desktop to be created as described in this paper. These can be rapidly created using an application builder to create a solution specific to the business requirement and processes. A bespoke simple agent interface can be constructed in a matter of days.

Integration with legacy systems can be provided through APIs (Application programming Interface) or web services and, of course, the rich CTI integration which is integral to the mplsystems solution.

**But requirements change:** the way that contact centres deal with customer interactions needs to evolve. Businesses may launch new products, change process rules, the way service requests are dealt with or launch new campaigns. Traditionally, changing process rules is a lengthy task involving IT departments or going back to vendors but, by using the Application Builder environment, part of intelligentContact from mplsystems, even non-technical end users can quickly build and publish process-centric applications within the desktop. The agent interface, call flow and business process rules can be easily modified, enabling end users within the businesses to modify and change campaigns and ways of dealing with customer service requests as the needs of the organisation changes.

To achieve efficiency in the contact centre, the focus should be on simplifying the agent desktop

## 6. Conclusion

There is a clear way forward to making contact centres more productive whilst improving the customer experience and that is to simplify the agent desktop, 'mash-up' existing applications and empower agents to help customers and resolve their requests.

To achieve efficiency in the contact centre, the focus should be on simplifying the desktop, not incorporating additional complexity with further systems or applications which promise to add value to the business. Many businesses are looking to reduce the complexity in their contact centres and the number of systems in use by removing those CRM systems which promised so much.

A simple agent desktop should provide multi media contact handling to include calls, emails, online, and social contact; it should guide the agent through all processes to complete a customer transaction; it should draw required data from underlying systems and action the required requests to these systems. If this simplification can be created around a business's specific requirements then real productivity savings can be made and enhanced customer experience achieved.



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## About mplsystems

mplsystems provides multi-channel contact centre technology, customer experience software and mobile field service technology for sales, service and mobile workforce operations. With over 15 years of contact centre practitioner experience, mplsystems now works with more than a thousand clients globally in the financial services, facilities management, retail, healthcare and leisure sectors, enabling them to gain a competitive edge by extending customer contact throughout the organisation and automating business processes around a single client view.