

# Enhancing the Customer Experience

A smart desktop enables agents  
to focus on the customer

## White Paper



**V E N T A N A**  
R E S E A R C H

*Aligning Business and IT to Improve Performance*

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## A Crucial, Complex Relationship

Customers are the lifeblood of most companies: Without their business, companies would not survive in today's highly competitive markets. It is, therefore, not surprising that a great deal has been written about the customer experience and the need to maintain high levels of customer satisfaction. Often overlooked in these discussions is the fact that the customer experience is determined by all the interactions a customer has with a company, from marketing campaigns, sales and service calls, interactions with the contact center, and finance. Their level of satisfaction, however, usually reflects their most recent interaction, which can easily sour years of hard work. Companies that really focus on the customer try to ensure that each interaction is consistent across all touch points and communication channels, fits with the customer's profile and previous business with the company, and occurs in the context of a customer relationship strategy agreed upon within the company.

Customer relationship management (CRM) systems were supposed to provide this type of unified, consistent interaction. However, many companies discovered that their various departments handle customer interactions in different ways, using different systems. This presents an enormous challenge to the contact center, which handles an increasing number of these interactions, as well as any negative fallout that may occur. Because they have to access a variety of systems in an attempt to resolve customer calls, agents spend too much time working on the computer and not enough time speaking to the customer and dealing with his or her issue.

Traditional CRM systems have not yet fulfilled their promise.

Contact centers play an important role in the interaction between customers and companies. For many customers, contact centers are the only way they can interact with a company. Likewise, for many companies, contact centers are the primary way they interact with their customers. Despite what companies like to think, these contacts are not always positive experiences for their customers; in fact, respondents to a recent United Kingdom government survey into the everyday life of British citizens ranked their interactions with contact centers among the top four sources of daily irritation. The burden of improving this situation more often than not falls on contact center agents, so much so that it is rightly said that a good agent can overcome bad processes and systems, but one bad agent can erase years of customer goodwill. That said, companies could make their agents' lives easier – and increase their customers' satisfaction – by giving them much better support at their desktop. A recent Ventana Research study shows that many agents still have to use multiple computer monitors to access the systems they need to handle customer interactions, and even those with only one still have to navigate through a maze of systems and screens. The solution lies in a single, smart desktop that better supports call-handling processes and reduces the number of data fields an agent must access to resolve an interaction.

## The Challenge for Agents

Surveys recently conducted by Ventana Research show that 98 percent of contact center agents need to access at least one business application to resolve a customer interaction, not including utility systems such as a soft phone and workflow; 44 percent of the respondents said agents have to access three or more.

Systems vary from company to company and from interaction to interaction; they include enterprise resource planning (ERP), CRM, sales and order processing, and applications specific to the business – for example, telecom billing or credit card processing. This list changes as companies invest in new systems to support new business challenges. In addition to those that manage business transactions, agents use systems to help manage the flow of calls, such as scripting and process maps, and to work with other employees in the center or throughout the company, including collaboration, instant messaging (IM) and workflow.

The nature and number of systems have a significant impact on the efficiency and effectiveness of agents. Much of the time, agents handle customer calls that are largely unstructured, following the flow of the customer/agent conversation. Scripts, prompts and process maps can help manage the flow, but agents have to rely on their initiative to respond to the customer. Because most applications weren't developed with this in mind, agents have to navigate through many screens to find and input data while talking to customers. To make matters worse, the required fields often are embedded in different systems, making it necessary to navigate across multiple applications and re-enter data several times. The more systems and the more complicated the screens,

**Number of Applications Required to Handle an Interaction**

| Number of Systems | Percentage of Respondents |
|-------------------|---------------------------|
| Zero              | 2%                        |
| 1 or 2            | 54%                       |
| 3 or 4            | 35%                       |
| 5 or 6            | 5%                        |
| 7 or more         | 4%                        |

**Type of Systems Required to Handle an Interaction**

| Type of System       | Percentage of Respondents |
|----------------------|---------------------------|
| CRM                  | 58%                       |
| Business-specific    | 41%                       |
| Knowledge Management | 41%                       |
| Instant Messaging    | 29%                       |
| Workflow             | 29%                       |
| Collaboration        | 23%                       |
| Scripting            | 20%                       |
| BPM                  | 20%                       |
| ERP                  | 19%                       |
| Don't know           | 6%                        |

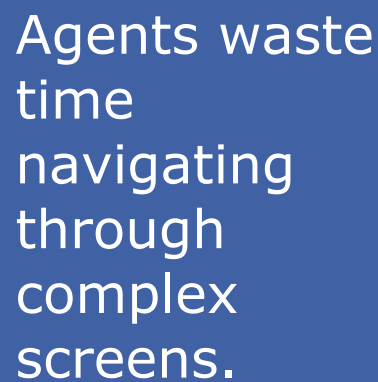
the more the agents have to concentrate on data retrieval and input, and the less they focus on the customer.

## More Effective Interaction-Handling

At the most basic level, businesses are a series of processes that contain tasks executed in a defined sequence, according to rules. Customer relationship management, in its fullest extent, is a good example. It is a series of processes that determines how a company should handle each touch point with a customer to achieve the desired business outcome. By its nature it transcends business units – marketing, sales, field service, finance and the contact center – and creates transactions in multiple systems.

Interaction-handling is part of this process and has two dimensions. First is how it fits into the business process being executed; for example, the company needs to know how a sales inquiry to the contact center relates to the overall sales process. And second is how the process should execute the interaction itself; for example, a sales inquiry should follow the proper sequence of steps, from identifying callers and determining why they called, through resolving the issue. In all cases, the data required to complete the process poses a challenge.

To make the process as efficient and effective as possible, ideally the agent would access the data through application screens that mirror the flow of the conversation. This is unlikely, however, unless companies deploy a smarter desktop that hides unwanted data fields and presents only those the agent requires through a single user-friendly screen that matches the typical call flow.



Agents waste time navigating through complex screens.

This would reduce the number of screens an agent has to navigate and also reduce the number of keystrokes an agent has to enter, since data would only have to be entered once. And because the flow would follow a typical call, the agent could focus on the caller. The data fields also would prompt the agent to take the next step and capture all the required data, thereby reducing unnecessary after-call work. Both call-handling times and after-call effort would shorten, providing cost savings. Because agents would focus on the caller, customer satisfaction would increase as well.

An important performance measure in centers is first-call resolution; that is, resolving a caller's issue during the first call. This saves time and money and results in more satisfied customers. Reducing the complexity of accessing systems will help achieve this. But in a small percentage of cases agents need to collaborate with other agents in the center or specialists available only in other departments. Companies can achieve this in a variety of ways, but it normally requires agents to access e-mail, workflow, IM or collaboration tools. The better companies integrate these tools into a smart desktop, the more efficient and effective their agents will be.

## The Impact of Virtualization

One of the hottest topics in the contact center market today is virtualization: distributing the handling of customer interactions, especially calls, to employees outside the traditional contact center. The goal is to ensure that the most appropriate employee handles specific customer interactions; that employee might be a highly skilled worker in a different business unit, a mobile worker such as a field service engineer or even someone who works from home. Voice over Internet Protocol (VoIP) is the technology that enables virtualization. It can detect which employees are present and available to handle an interaction and also makes this affordable.

### Business Functions Handling Interactions

| Function       | Percentage |
|----------------|------------|
| Sales          | 60%        |
| Contact Center | 60%        |
| Service        | 48%        |
| Marketing      | 44%        |
| Other          | 21%        |
| Finance        | 17%        |
| Mobile workers | 17%        |
| Home workers   | 10%        |
| Manufacturing  | 4%         |
| Other          | 7%         |

Our research shows virtualization is gaining momentum, with a significant number of respondents saying that groups outside the contact center are handling interactions; the primary ones are listed in the chart at right.

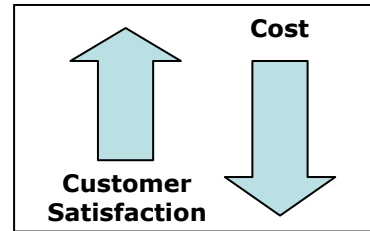
While Ventana Research believes virtualization will have a positive effect on the customer experience, companies should be aware of the downsides. First, it will have an impact on call-handling processes. Although the basic processes will remain the same, complications will arise when an agent needs to hand off calls or to collaborate with other employees to resolve an issue. Both will be more complex than when a contact center agent signals a supervisor for help. Second, most of the “new style” agents whom virtualization brings into the customer interaction process will only work part-time. Unless companies deploy sophisticated call-routing systems, these agents will still need to follow the defined processes and access the same number of systems as “old style” agents. If new agents have an old-style desktop, training times – and related costs – will increase. However, with a smarter desktop, agents would not need to understand the complexities of the systems. Ideally, the system’s data fields would guide them through the process.

## Benefits of a Smarter Desktop

Contact centers play an important role in determining the customer experience; as mentioned earlier, it is often said that one bad experience with an agent can destroy years of hard work. Contact centers also are expensive to operate. Ventana Research studies show that companies continue to strive to get “more for less,” usually by reducing call-handling times and increasing agent utilization. The agent desktop can have a significant impact on both. A smarter, unified, user-friendly desktop that lets agents access all the data they need to resolve an interaction, without navigating through complex screens in one or more systems, can reduce costs in several ways.

Agents will require less training, thereby reducing initial training costs; they will be happier in the job and stay longer, thereby reducing turnover and recruitment and retraining costs; and they will become more effective and efficient, handling more customers and providing a more satisfying customer experience.

The caller also will benefit. Of course, the customer's key requirements don't always align with the company's. Customers mainly want their issues resolved to their satisfaction as expeditiously as possible. With more time to listen and to provide information, the agent will be more likely to achieve that resolution.



A smarter desktop will also deliver a number of technical benefits. As the business environment changes, so must processes and systems. A smarter agent desktop will reduce IT development requirements and retraining costs. The same can be said about the transition to virtualization. A smarter desktop will require less training and be much easier to use, an important consideration when a company has a wider pool of employees handling interactions part-time. And smarter desktops will also make it easier to implement process changes required to adhere to new regulations, such as Sarbanes-Oxley and privacy laws.

Another frequently discussed response to changing business and process requirements is a service-oriented architecture (SOA), which can be configured to support business processes more effectively than less flexible designs. Various Ventana Research studies show that although many companies have begun to transition to an SOA, the impetus usually comes from the need to solve a burning business issue. In the contact center, we believe that issue most likely will be the need to improve the agent desktop to better support interaction-handling processes. Contact centers are now of an age that most have legacy systems that are difficult and costly to replace; in this situation, an SOA-based approach that hides the complexity of the current maze of systems from agents will be attractive.

The smart desktop is key to restoring the balance between cost and customer satisfaction. A smarter desktop will make the agent's life much easier, giving them more time to focus on the customer and far less need to worry about the process and systems. For companies, a smarter desktop should reduce average call-handling times and after-call work, increase adherence to required processes, support the transition to virtualization and, most importantly, increase customer satisfaction and, with it, future business.

Agents represent the highest re-occurring cost in a contact center. The more time they spend focused on their desktop, the less likely they are to satisfy customer expectations and the higher the costs because of increased call times. Companies should examine the interaction handling processes to see how they can be improved by deploying one of the software systems available to support this transition.

*A global cell phone operator cut average call handling time in half and eliminated after-call work entirely. How? By deploying a smart desktop.*

## About Ventana Research

Ventana Research is the leading performance management research and advisory services firm. By providing expert insight and detailed guidance, Ventana Research helps clients operate their companies more efficiently and effectively. We deliver these business improvements through a top-down approach that connects people, processes, information and technology. What makes Ventana Research different from other analyst firms is our focus on Performance Management for finance, operations and IT. This focus, plus research as a foundation and reach into a community of more than 2 million corporate executives through extensive media partnerships, allows Ventana Research to deliver a high-value, low-risk method for achieving optimal business performance. To learn how Ventana Research Performance Management workshops, assessments and advisory services can impact your bottom line, visit [www.ventanaresearch.com](http://www.ventanaresearch.com).