Decision Guide for Intelligent Contact Center Agent Engagement

Key points to consider when adopting customer service solutions for assisted service

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AUTONOMOUS CX

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Introduction

Customer Experience (CX) as a term may have many definitions but it is generally accepted that it is all about creating **personalized, seamless, low-effort customer interactions**.

By its very nature, CX takes a holistic view. It isn't focused on just self-service or just agent engagement.

While there has been a push of late to improve **self-service**, the most successful CX initiatives are those that recognize the importance of simultaneously improving **contact center agent engagement**. In fact, there is a renewed interest in assisted service. Whether due to customer preference, or interactions that are naturally less effort via the agent assisted channel, organizations should continue to recognize this very important service channel.

Although self-service seems to have received most of the technology innovation, we're finally seeing the same technology being applied for agent engagement. This makes it an ideal, and exciting, time to be investing in improving the assisted service channel.

The agent engagement landscape can be confusing. This guide aims to cut through the clutter and help CX practitioners understand the state of the industry, navigate pitfalls and show how to roll out assisted-service projects, while also minimizing risk.

What is contact center agent engagement and how is it changing?

Agent engagement refers to any customer interaction that requires a human-touch. While much of the technology focus of recent years has been with self-service, the assisted service channel is seeing a resurgence of interest and importance. There is also a growing realization that customers no longer need to make a binary decision on using one form of service over the other - instead, self-service and assisted service are deeply intertwined, so much so that a single customer interaction can span both channels, multiple times.

The same advances that powered self-service - Artificial Intelligence and Machine Learning, Personalization, Chatbots - all of these are now being applied to the assisted service channel, giving

organizations the ability to deliver perfect agent engagement interactions. It isn't about a single technology on a single channel anymore. Assisted service is still about the human-touch, but with the added assistance of a robot! Think of it as "Intelligent Agent Engagement."

What is the motivation for companies to improve their assisted service?

The strategic importance of investing in the Customer Experience has led organizations to improve all aspects of the customer journey. While the self-service channel is being prioritized in part due to customer demand and in part due to cost advantages, companies are being driven to take a renewed look at agent engagement due to a number of factors:

Channel preference

While "omni-channel" is an overused buzzword, there is no doubt that the modern customer is more sophisticated, more demanding and has more choice. They do not want to be "forced" into a particular journey or channel. If CX is about delivering low-effort interactions, organizations must cater to customer preferences and conveniences. A single customer interaction should have the ability to start in either self or assisted service and bounce back and forth between the two in whichever manner drives the most efficient, low effort interaction. Companies simply cannot afford to think of either Self-Service OR Assisted-Service. A sound CX initiative MUST take both into account.

Rising Complexity

Product and service complexity is on the rise. Some customer interactions are so complex that they simply do not lend themselves to the self-service channel (without high-effort). The irony is that the improvement of self-service means that 'easier' interactions are now managed entirely by the customer, leaving the more complex interactions for the agent. The fact that assisted service is now handling increasingly complex queries, means that investment is needed to improve the handling of these queries.

Technological advancement

Self-service receives all the press. The romantic notion of Artificial Intelligence, talking computers - the realization of HAL from 2001: A Space Odyssey - it's exciting and in truth, has benefited from amazing advances in technology. Agent engagement has been the red-headed step-child. Fortunately, the same technological advancements that propelled self-service is now being applied to assisted service. Everything from AI to UI/UX is now being utilized to make the assisted service channel a peer with its self-service sibling.

Self-service adoption

Many organizations are finding that self-service adoption lagged behind the technology advancement, and certainly behind the hype. To be clear, the lagging self-service adoption is not due to a failure of new self-service technology which is proving to be exceptional - instead, it's a combination of multiple contributing factors. Unfortunately, it has to be recognized that most of us have suffered from poor self-service experiences in the past thanks to unwieldy IVR trees, inaccurate call routing, and poor voice recognition. As self-service continues to improve and put the old perceptions to rest, we'll see explosive growth in this channel. However, no matter how meteoric the rise of self-service, the demand for intelligent agent engagement will be stronger than ever.

Intelligent Agent Engagement

While assisted service aptly describes the human-touch component, intelligent agent engagement more accurately describes the human-touch fueled with technology to drive improved operational efficiency.

Intelligent agent engagement is about transforming complex agent desktops, a variety of channels (voice, chat, email, etc) and complex processes (troubleshooting, complicated products, regulatory) into an operationally efficient customer service experience.

While terminology may vary by vendor or industry practitioners, we can broadly describe intelligent agent engagement as encompassing:

Smart Agent Assistants

Much like chatbots improved the self-service experience, we now see this same technology being applied to assist the contact center agent in managing a customer interaction. The smart agent assistant works side by side with the agent, unobtrusively, to provide proactive guidance, invoke automation sequences, answer questions for the agent, surface relevant knowledge and more. Agents are able to focus on the customer providing empathy and understanding, while the smart agent assistant focuses on the systems and processes
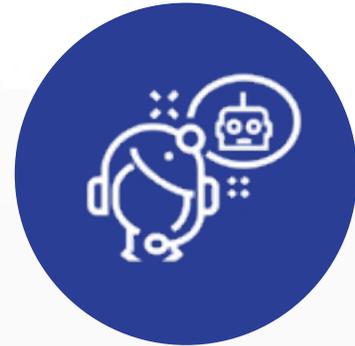
Unified Agent Desktops

Also called 'agent cockpits', 'single view solutions', these unified desktops transform complex desktop environments through a consolidated UI and enables automation of entire processes resulting in improved accuracy and dramatically reducing handle times.

Automation

The key to driving operational efficiency is the ability to automate manual, error-prone and time-consuming tasks on behalf of the agent. Sometimes described as attended Robotic Process Automation (RPA), customer service RPA (CS RPA) applies the same proven automation benefits to the agent's desktop. CSRPA works side-by-side with the agent and invoked as needed to drive efficiency and speed into the interaction.

What level of intelligent agent engagement do you need?

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	CS RPA	Smart Agent Assistants	Unified Agent Desktops
Driver	Useful for manual tasks or processes that are well defined, remain consistent yet are time consuming.	Provides maximum flexibility and operational efficiency.	Very good for resolving highly complex desktops that have multiple applications and complex processes.
Characteristics (when to use)	Many manual processes Tasks are repetitive and predictable. Typically, they have a single outcome.	Interaction complexity Complex customer interactions requiring more guidance, coupled with the benefits of automation	Desktop complexity Numerous applications or processes that slow or distract the interaction.
Benefits	Reduce handle time and improve accuracy by automating manual processes or tasks.	Let's you keep your current desktop and provides guidance to agents, perfect for reducing interaction complexity. Also allows for faster onboarding.	Abstracts application complexity and the need to "alt-tab". Handle times are reduced, onboarding is faster.
Primary key performance indicators (KPIs)	Average handle time (AHT)	First contact resolution (FCR) and AHT	FCR and AHT
Return on investment (ROI)	Can be high depending on the complexity of the manual task or the frequency (ie. high volume) of the task.	Intermediate cost with high ROI based on time savings for deployment and handle time	Very High ROI in complex desktop environments primarily through AHT reduction but secondarily through reduced agent training time.

These solutions can be combined in any manner necessary to most optimally address an organization's unique requirements. Companies can start small by automating a single task, for example, while eventually unifying the desktop and also providing smart agent guidance and assistance. Indeed, the most successful agent engagement initiatives start small, continuously improve and use a combination of techniques and technologies to reach the end goal. **This makes it extremely important to choose a vendor that has a broad assisted service product portfolio.** Most organizations will end up adopting a mixture of these various types of intelligent agent engagement services, and companies will ultimately appreciate a lower TCO, lower risk, and more effective deployment if a single platform can support all three types of assisted service development.

What makes intelligent agent engagement technology unique?

It can be difficult to design technology to flawlessly work in tandem with its human counterpart.

Modern agent engagement or assisted service solutions are using the same pioneering Artificial Intelligence as self-service, but within a far more fluid, dynamic environment. One need only look at Robotic Process Automation (RPA) as an example. We distinguish unattended RPA - focused on back-office tasks - with Customer Service RPA (CSRPA) - front office/contact center tasks. In CSRPA, the 'robot' needs to work in tandem with the human counterpart. Interjecting at times, idly waiting in the background at other times. Learning when it's decision or action is overridden by the agent. It should be readily apparent that this side-by-side operation is a lot more complex than simply automating a back-office task in its entirety. It is for this reason that few vendors specialize in CSRPA. These same "computer/human" interaction issues are present within all the intelligent agent engagement solutions.

Finally, many vendors simply do not have the experience of working on the Voice channel. By comparison Digital channels are a lot easier for developers to integrate with. With intelligent assisted solutions, there is need to merge digital and voice into a single seamless experience.

The average "chatbot" vendor does not have the depth and breadth of channel integration necessary.

Practical steps for rolling out intelligent agent engagement solutions

It isn't hard to find examples of failed assisted service projects. Whether it's exaggerated claims leading to unrealistic (and unmet) expectations, technology failure, mismanaged projects or poor adoption, there are no shortage of factors that can make a poorly managed deployment littered with risk.

Companies considering embarking on an agent engagement project should plan careful to decrease risk in the project. The good news is that with careful planning and solid technical choices, the risk can be entirely mitigated.

Risk	How to Address
Technical	Any advanced technical project carries inherent risk. Companies should de-risk technical issues by performing comprehensive Proof-of-Concepts/ Proof-of-Technology to ensure the software matches expectations and is compatible with the organizations systems.
Scope (Boil the Ocean)	However tempting it may be to implement a complete assisted service solution at once (made worse by vendors encouraging this boil-the-ocean approach), your organization should start small and add incrementally as the value is proven and the risk is mitigated. Working with the vendor, identify high value and low risk starting points and iterate from there. Regardless of how much you bite off initially, assisted service should always be thought of as a continuous improvement project.
Adoption	Contact Center Agents must realize the benefits of the technology. It is there to assist the agent, not replace the agent. Roll-out the solution slowly to a pilot group of agents. Solicit their feedback and make them champions within the organization. Your agent is your user so ensure a perfect agent experience along with a perfect customer experience.
Expectations	Internal expectations need to be set across a number of dimensions. Timeline for implementation, expected cost, expected ROI, expected metric improvements (AHT, FCR, etc). Making sure key stakeholders within your organization are all on the same page is key to managing expectations. Your technology vendor should also be aligned with these expectations so that every party is working to the same goal.
Resources	Projects need to be properly resourced - both those internal to your organization as well as the vendor's resources. You need to ensure that they have the skills necessary to the project success.

The top 3 questions you must answer

Before moving forward with an agent engagement solution, organizations should consider three critical questions:

"What is our business case?"

"How will we prepare our organization?"

"How will we select a vendor?"

Clearly that's not an exhaustive list of questions but they touch upon three critical areas that are often highly indicative of ultimate project success or failure.

"What is our business case?"

While there is always pressure to look at the latest and greatest in technology, every successful project is driven by a sound business case and not by tech. Moreover, without a business case that is based in some ROI (even indirect like CX), it will be difficult to quantify the success of your project, much less obtain funding. The types of questions to consider here include:

? **What's wrong with our current assisted service solution? What do we want to improve?**

It's helpful to construct some baseline as it helps frame expectations and helps with vendor selection. For example, if your primary problem is high abandonment you may need to focus on one solution, whereas if your primary concern is long call times, that may lead you to a different path.

? **What is our ultimate goal for a new assisted service solution? NPS improvement? Customer retention? Filling in a specific gap?**

That is, define clearly what you want your assisted service solution to achieve.

**?** **What have other contact centers done and what have they learned?**

Business Case	Benefit	Industry
40 disparate applications on the desktop	Combined desktop applications with password vault and saved $20M	Telecommunications
Complex workflows for 10 supported products	Seamless integration with scripts to increase upselling by 235%	Financial Services
Lack of process management and numerous manual tasks following customer interactions	500 hours saved per month by automating outbound communication with customers	Hospitality
Need to increase customer retention metric and improve the customer experience	Reduction is system management and navigation complexity for the agent which alleviated their focus to be applied towards the customer – customer retention increased, training time decreased and $6M in annual savings was achieved	Insurance
Numerous applications and systems for the contact center agents to learn	Unified agent desktop resulted in 50% reduction in training time and over 3.5m euro savings	Telecommunications
Improve the efficiency of contact center operations	AHT reduction of 35%, customer service representative (CSR) training time reduced from 7 to 2 weeks, increased up-sell by 50% and 20 second contact wrap-up eliminated	Public Utility
Aggressively growing online business. Needed a cost-effective solution to allow its CSRs to quickly access critical customer data stored in several disparate back-end systems	Substantial increase in "hit rate" (starting the agent on the relevant screen) and guiding the agent through the next best action	Retail

"How will we prepare our organization?"

Really successful assisted service projects don't operate in a silo. For example, a modern assisted service solution should be in sync with any self-service solution, whether that's deep integration for a true omni-channel experience or even just for a consistent brand and experience. Consider items such as:

Have you got buy-in up and down the organization? This is clearly important for budget approval, but also for removing roadblocks to implement an assisted service initiative.
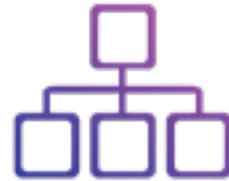
Consider what resources you will need.

Set expectations on the overall timeline and the project results.

"How will we select an assisted service vendor"?

Potential vendors should be measured on a number of dimensions. It is important for organizations to do extensive due-diligence before selecting a vendor. Assisted Service projects are high visibility and offer high ROI. Experiencing a failure will make future assisted service projects a harder sell. Below are some criteria to consider:

Item	Comments
Comprehensive self-service and assisted service technology and expertise	Modern CX projects are a combination of self-service and assisted service improvements. They should not be thought of as distinct silos and indeed are often intertwined (think omnichannel). Your vendor should have expertise and technology for both assisted and self-service, even if your initial deployment is assisted service only.
Single Platform	Because of the interconnectedness of self and assisted service and the requirements for today's omnichannel customer, a vendor should have a platform that seamlessly connects these two service types. Be wary with vendors who have simply acquired various technologies with little to no integration. Without a single platform, TCO will be higher and complexity will be increased (as will risk). Moreover, it is very difficult to provide omnichannel customer service across an array of disjointed and disparate technology.
Multi-faceted Assisted Service Solutions	As we have demonstrated, assisted service solutions can encompass a broad array of technologies, from automation, to unification to guidance and internal chatbots. The vendor should be able to apply all these technologies to deliver the most flexible and power assisted service solution.
Expertise	As discussed in the risk section, the resources on your project will be instrumental to the success or failure of your initiative. You should really test the vendor's competence and level of expertise. Bring them on-site to do a deep-dive. Get to know the actual resources that will be on your project. Make sure they understand CX projects and the unique needs of your business.
Maturity and Stability	Assisted service projects can be complicated, are high visibility and have high expzectations. They also become fundamental to the workflow in your contact center. As a result, you need to make sure your vendor has been in the CX space for a long time and offers your company the necessary maturity and stability in order to form a long-term partnership.

Conclusion

It's an exciting time for assisted customer service! The technical advancements coupled with a more demanding customer makes this an ideal time to explore what assisted service can do for your broader customer experience (CX) initiatives. With a quick ROI and a measurable impact on CX, intelligent agent engagement should receive prioritization within organizations.