How to Empower Mobile Workers to Enhance Customer Experience

talkdesk®

Table of Contents

Introduction

Workforce mobility–or the ability for employees to work from home or other remote locations and easily perform their duties no matter where they are– has become a requirement for today's organizations. The International Data Corporation (IDC) forecasts a steady 20% growth of the mobile worker population over the next four years, expected to reach nearly 60% of the total U.S. workforce. Almost two out of every three employees will be working in mobile, remote or non-traditional office environments.

The rapid growth is driven not only by work-from-home mandates in the wake of a pandemic, which forced businesses to reassess their way of operation, but also by the growing significance of competing based on customer experience (CX). Customer expectations are increasingly challenging as customers transition among channels and demand flexible, uninterrupted, contextualized and fast customer service throughout the entire customer journey. To meet this requirement, customer service organizations need to know their

whole story, at a glance, whenever the customer engages, and proactively address customer concerns.

But the responsibility for CX goes beyond the customer service department and now includes every employee– including frontline, mobile employees–that interact with customers.

To achieve this, organizations must work to create a consistent customer experience no matter where the customer interacts or engages with the business. And, for employees to deliver a consistent customer experience, they must have a mobile workforce communications solution that gives a 360-degree view of the customer and ensures that every employee can follow the entire customer journey.

This guide will help you understand the role of the mobile workforce in CX and customer service delivery and provide considerations when evaluating mobile workforce communications solutions.

The goal is to enable frontline teams to effectively and efficiently solve customer problems, provide status updates, make deals; and more–all from a non-traditional office environment–contributing to better customer engagements and a more consistent and high-quality CX across all customer-facing teams.

I. Mobile Workforce and Customer Experience

The term "mobile workforce" applies to everyone who works outside of the traditional office: in a home office, co-working environment, different company locations where companies serve customers, customers' homes or simply on the go. Outside sales representatives, plumbers, field technicians and insurance brokers, to name a few–have always been a part of the customer experience, but only lately has their contribution to the overall CX surfaced. While contact center and inside sales teams are areas of focused investment when it comes to upgrading tools and technologies, the field service hasn't evolved as much, often remaining disconnected in practice and technology from other aspects of CX.

As a result, customers complain about how CX from the same company can be different when non-contact center employees are involved, and it comes as a negative surprise. To improve CX, companies need to be sensitive and mindful about what happens outside of the contact center.

In pursuit of a better customer experience, companies are mobilizing their customer-facing teams around customers, developing digital transformation and mobile strategies aimed at a more consistent CX across the entire customer journey.
They are analyzing the customer journey through multiple touchpoints and revising how teams are providing CX, as well as the tools they use and the challenges they face.

Expert Insight: "The contact center should be the guardian of the 360-degree view of the customer—aware of everything. Who else can gather all of this information?"

— HEAD OF DIGITAL TRANSFORMATION AT A U.S. FINANCIAL SERVICES COMPANY

The following are examples of mobile workforce scenarios to consider when evaluating customer-employee touchpoints that occur along the complete customer journey.

Location-based workers
They provide CX on-site. They are usually assigned to a specific location, building or local branch and often are away from their desktops or even deskless. They need to be mobile to stay connected to their colleagues and customers directly or via the contact center.
Common examples are:
• Local bank branch officers
• Warehouse workers
• School, university, library, campus workers
• Airport staff

Outside sales
They spend a large portion of their time in the field, meeting with customers, and promoting and selling the company's products and services. They have a large pool of customers and prospects they may be in contact with throughout the day.

Field service
They provide customer service at the customers' location. They are working en route, moving from one client to another, and need to be connected to inform customers of status updates, etc.
Common examples:
• Moving services
• Delivery services (parcels, local goods delivery from pharmacies, food markets, etc.)
• Installation crews
• Caregivers

Fact: By industry, supermarket chains provide the best customer experience, while TV and Internet service providers provide the worst.

— 2018 TEMKIN EXPERIENCE RATINGS, US

Remote workforce

They are distributed between different locations and can operate on the move or from home, connecting to customers from all over the world.

Examples include:

• Real estate agents
• Insurance agents
• Sales teams
• Hospitality staff
• Lawyers

There are also other cases when companies turn their typical workforce into a mobile one:

• **After-hours support**

On-call customer service employees or urgent customer support required:

• Caregivers on call
• Hotel meeting services
• Property management

• **Contact center fluctuations**

During seasonal surges or when unexpected events happen, companies repurpose their staff rapidly to answer customer inquiries.

While the contact center remains a key customer service entry point and repository of CX information, CX leaders do understand the importance of the experience customers get from the mobile workforce. They recognize that an experience with a mobile worker is a reflection of their brand and worth making investments to overcome inconsistency and improve their performance.

II. Mobile Workforce Challenges

We talk a lot about customer experience and employee experience, and often these conversations are separate from each other. But CX is 100% dependent on the people who provide it; that's why it's crucial to know all the challenges customer-facing mobile employees have, especially when they serve customers outside of the traditional contact center. At the end of the day, it's impossible to fix something without knowing how it's broken.

Talkdesk® interviewed several mobile workers to better understand their struggles to communicate with customers and perform their jobs while on the move. The top findings help organizations consider what they need to overcome when enabling their mobile workforce to provide better CX.

① Too much communication

Communication is an essential part of the customer–facing job. For the mobile workforce, whether it is outside sales, caregivers, real estate agents or others, it is often too much. They have closer, more meaningful relationships with customers and they need to communicate with their colleagues, partners or superiors. There are days their phone doesn't stop ringing. This is a painful dilemma for mobile employees: on one hand, they need to build a valuable interaction with a customer to pave the way for a successful outcome, whether it is a new sales opportunity or closed deal; on the other hand, talking to customers all the time leaves no room for their primary responsibilities and can affect personal KPIs.

Expert Insight: "The number of customer calls per day can reach 50. Then, I call my colleagues to try to schedule [property showings] and they don't reply. And then, the callbacks start."

— REAL ESTATE AGENT AT A GLOBAL AGENCY
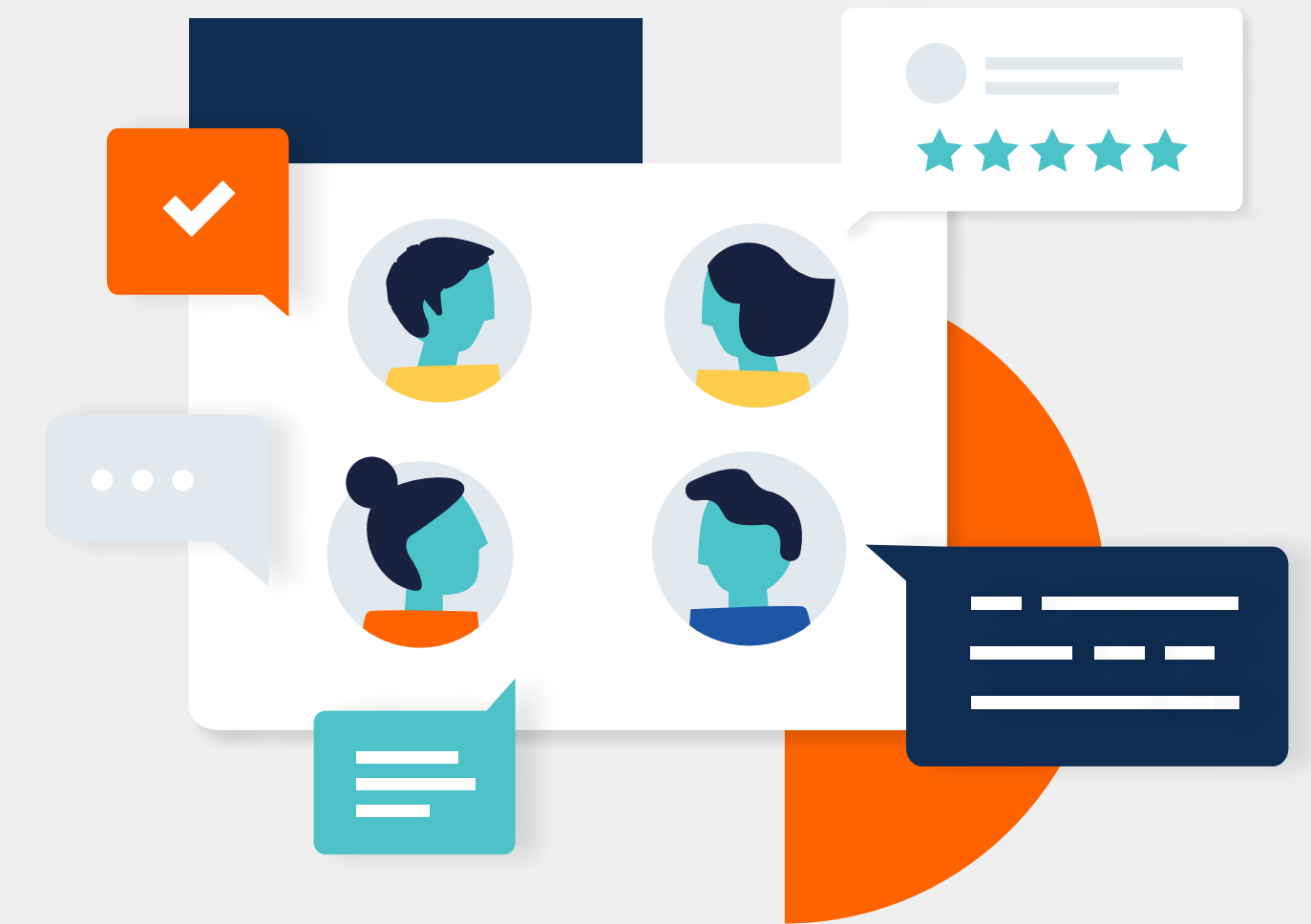
2 Every customer interaction is unique

Unlike in a contact center, the interaction that happens between mobile workforce employees and customers is more complex and unpredictable. They often can't have a script; instead, the success of the interaction depends on how well they know a customer, how much information they have at the time of the interaction and their communication skills. Unstructured communication requires a lot of attention and energy from employees and can be eased with the right tools.

Expert Insight: "Creating empathy [with customers] is very important when you are selling properties. You need to establish some connection, some bonding."

— REAL ESTATE AGENT, FORMERLY AT AN IBERIAN REAL ESTATE AGENCY

3 Mobile workers are not mobile-ready

A smartphone is not enough to be mobile. But, to increase employees' mobility, not all of the different strategies companies use work as expected.

When a company provides a smartphone and a phone number, the employee has to carry two smartphones, one for personal use and one for work. This can negatively affect communication with customers as the employee needs to juggle two devices. Another common situation is when a company pays for the mobile worker's phone bills. This also has cons, as professional and personal communication get mixed; information can more easily be missed and negatively impact CX. But, with the right technology, these are not the only options organizations have.

Fact: CIOs and end-users have different views on the availability of apps within their companies. Almost half of CIOs strongly agree they are providing employees with the business and productivity apps they need to do their jobs, while only 24% of end-users believe this.

— THE IMPACT OF THE DIGITAL WORKFORCE, FORBES INSIGHTS

4 Too many business applications

Back-office and contact center employees are toggling between 35 business applications, switching them around 1,100 times a day. Deskless frontline workers must resort to applications they can access from mobile devices while on the go, hence they experience some issues:

It's time-consuming to work with all applications. A fairly small share of business applications are mobile-enabled and to access the remaining, employees need to use the smartphone's browser. If it's difficult, they end up not using them or postponing the task until they reach a desktop, therefore some information can be lost. It's unproductive when mobile–ready applications are disparate. For instance, if a salesperson needs to point out that a lead is in play and then update a CRM system with the meeting outcomes, that might involve two different applications, two data entries, duplicate information, etc. It's difficult to meet the technical support needs of mobile workers.

This can result in shadow IT, with employees resorting to workarounds, habits or tools that are not supported by company policy. They may also try to troubleshoot technical issues themselves, resulting in an overall negative experience that affects productivity and job satisfaction.

Expert Insight: "I use a lot of different mobile applications: I use Microsoft Excel to track listings; I use Dropbox to work with bigger files, such as presentations. Nowadays, everything is on WhatsApp, because we share a lot of information; sometimes I use WhatsApp more than email."

— REAL ESTATE AGENT, FORMERLY AT AN IBERIAN REAL ESTATE AGENCY

5 Lack of tools to provide customer insights from the field

A mobile employee may serve as a primary point-of-contact for customer support. This frequently occurs with outside sales, caregivers and real estate agents, for example. When this happens, and the field employee doesn't have an opportunity to take notes during or after a customer interaction, this information can be lost; hence, CX leaders do not have a full picture of the customer experience. Frontline employees are often on the move: they might be driving or meeting with a client–it's very easy for them to forget the details of a call. In this scenario, call recording, an essential functionality in the contact center, can be a critical reference.

6 Disparate CX from distributed teams

When customers receive service from distributed teams it can impact customer satisfaction (CSAT) and retention. Imagine a customer who has internet services installed by a field service technician. The appointment, however, was scheduled by a contact center agent. The field service technician gives the customer different information about the internet service from the information provided by the contact center agent. With different employees providing disparate information, customers lose trust in the company and might never use its services again.

Another situation is neglect. When a contact center receives calls intended for mobile workers but isn't connected to them, the contact center agent has to take the message and forward it to the mobile worker, relying on the field employee to follow up with the customer. Since field teams are busy with various tasks, they might forget or follow up too late, causing customer frustration. CX leaders need to review and align all customer touchpoints.

Expert Insight: "I've heard people in organizations asking [customers] to leave a message with a promise that they'll get back to them in such-and-such amount of time. And then they don't. I think that's the worst. It says so much about how important I am to you."

— ADRIAN SWINSCOE, CUSTOMER EXPERIENCE ADVISOR

7 No access to critical contact center customer information

It can have a dramatic impact when the mobile workforce doesn't have access to the full customer experience data from the contact center. Customers that interact with mobile workers expect valuable and insightful conversations, personal approach and fast issue resolution. Various industries, such as banking, retail and insurance cite that one of their biggest

challenges is to be a "trusted advisor" for the customer. That's why customer information is valuable, especially when it is about a customer's past and existing experience with the company. Teams rarely have access to this information on the go, leaving them to improvise when meeting with clients. Access to this information helps speed resolutions, create opportunities for more personalized engagements and provides more opportunities to upsell and cross-sell.

Fact: 53% of remote workers face challenges when preparing for hybrid meetings (those with both on-site and remote meeting attendees from different locations).

— STATE OF REMOTE WORK 2019, OWL LABS

8 Lack of tools to work with customer sensitive information

The ability to secure sensitive customer information and comply with privacy regulations is a challenge for frontline employees. Many CX leaders find it safer to keep all sensitive customer data in the contact center and have the contact center relay relevant information to frontline employees on a need-to-know basis. Security issues are a concern, yet leading mobile workforce communication solutions have built-in security features to ensure customer information is kept private. Additionally, security solutions exist to provide device tracking that cannot be turned off or uninstalled by users, giving companies the ability to track, monitor and swipe devices that get lost or fall into nefarious hands.

9 Not being able to unplug

Regardless of whether mobile workers use their own mobile device or a company one, they are prone to receiving customer calls during important meetings, after hours or when they simply can't attend. The solution seems to be simple: turn off the phone, don't pick up; but since their success often depends on their communication with customers, they can't help but take these calls. This can, in turn, decrease their level of satisfaction at work. Mobile CX solutions with intelligent call routing can alleviate this frustration by transferring "off duty" calls to on-duty workers or enabling contact center agents to provide assistance.

Fact: Not being able to unplug is one of the biggest struggles of working remotely.

— THE 2020 STATE OF REMOTE WORK, BUFFER

10 Lack of seamless multi-device experience

Customer-facing employees don't want to be tethered to their desktops in order to work. The home office already means a certain level of flexibility that remote frontline teams expect, for example, the ability to switch seamlessly between devices such as a laptop, smartphone, tablet or smartwatch. Essential applications need to be accessible from all of these devices.

Aside from fulfilling the more obvious use cases, where mobile teams need convenient access to CX tools and customer information, there are other scenarios where multi-device utility provides benefits. In cases where customer calls are handled via a softphone application on an employee's computer, remote agents may encounter network-related issues that impact call quality; a smartphone with that same communications app installed can serve as a reliable backup to continue the call without disrupting service. As an alternative to computers or phones, a tablet

with an installed customer experience app can serve as a portable primary communication tool (and a cheaper alternative to desktop or laptop computers), providing enough screen real estate to keep open tools, such as a knowledge base or CRM, alongside essential call controls. A smartwatch with that same customer experience app installed enables a hands-free experience that captures call recordings and can be very important for employees that communicate with customers while driving.

Expert Insight: "Talkdesk Mobile Agent™ is a great backup for agents with slower Wi-Fi conditions. It provides a fast solution when call quality or call drop issues arise."

— OPERATIONS TRAINER AT A DONOR MANAGEMENT SOLUTIONS PROVIDER

The challenges mobile workforces face can seem daunting. However, with the right mobile workforce customer experience solution, organizations can easily manage their on-the-go teams while giving them the tools they need to provide excellent service.

Download this checklist for 7 vendor must-haves that will help you gauge and rate mobile workforce customer experience solutions.

III. Benefits of Having a Mobile Workforce Customer Experience Solution

Better CX

Improves brand image in customers' eyes
Customers want a seamless, easy and fast resolution to their issues at every stage of their journey. When companies provide easy, consistent experiences to customers, know who they are and do not require them to repeat information, they tend to be more loyal and satisfied.

13

Higher employee engagement and performance

Helps create more valuable conversations with customers

An easy communication tool with access to critical information in the hands of an on-the-go workforce helps initiate more valuable conversations with customers and empowers employees to become their trusted advisors.

> **Fact:** 14% of sales professionals indicated that gaining appointments is the biggest challenge they face in their prospecting efforts.
>
> — 2019 SELLING CHALLENGES RESEARCH, RICHARDSON

Empowers employees to work smarter

With the right mobile workforce communications tools and applications available to them, employees are equipped to make decisions that better serve customers and drive revenue.

Increases employee satisfaction from work

Along with decision making, the right mobile workforce solution affords employees on-the-go flexibility that positively influences their level of work satisfaction.

> **Fact:** Four out of every five candidates would turn down a job offer without flexible working if they had an approximately similar offer that included this benefit.
>
> — THE IWG GLOBAL WORKFORCE STUDY, INTERNATIONAL WORKPLACE GROUP

Enhances productivity

Readily available apps that reduce manual effort can save employees time, freeing them to focus on highervalue activities.

Business optimization

Helps easily adjust to customer service fluctuations

Depending on the industry, businesses can experience customer service activity fluctuations due to seasonality, promotional campaigns or unexpected scenarios. The right mobile workforce CX solution helps organizations manage fluctuations by arming additional remote employees to handle customer service during peak times.

Helps increase revenue

With all of a customer's information readily available, both contact center agents and mobile workforce teams can tailor more personalized offers, respond to complex questions and cross-sell or upsell based on their improved shared knowledge of the customer.

Helps save money

A central mobile workforce communications solution can be installed securely on employees' smartphones and company-approved devices, reducing equipment costs and driving better CX.
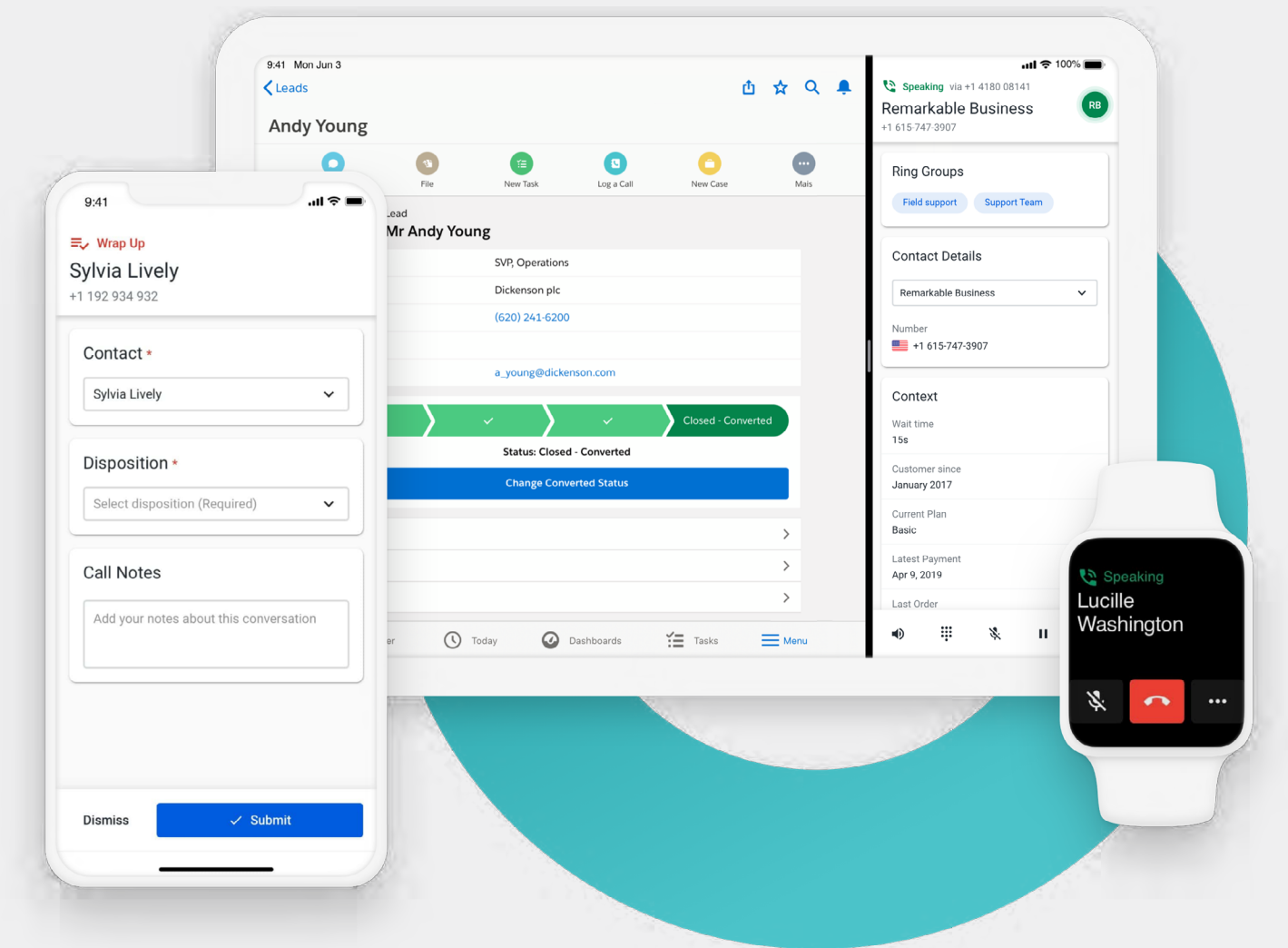
IV. Talkdesk On The Go

Talkdesk, the cloud contact center for innovative enterprises, also designs mobile workforce solutions that help CX outcomes and operational flexibility. Talkdesk On The Go™, a mobile workforce customer experience solution, has become a key component for organizations seeking:

• Contact center business continuity, by leveraging Talkdesk On The Go as a backup, application agents can easily access from a smartphone or tablet in case of sudden shifts to remote working.

• A holistic CX strategy that extends contact center tooling to distributed and deskless customer-facing teams that typically work in the field.

Talkdesk On The Go helps businesses support customers anytime, anywhere by putting mobile communication tools in the hands of the mobile workforce. Our customers are using Talkdesk On The Go to equip:

• Field teams
• Location-based workers
• Outside sales
• Remote employees

Talkdesk On The Go enables employees to provide consistent, real-time customer experiences through a unified device experience and seamless integration with popular CRM and Helpdesk systems.

Talkdesk On The Go offers enterprises:

Mobile-first customer communication tools to keep the mobile workforce connected with customers when they're in the field, on the road or working from on-site locations such as a warehouse, bank branch or retail store. Talkdesk On The Go enables communication and service through any mobile device, so field workers are more accessible to customers and more reliably connected with other employees.

Unparalleled flexibility to move seamlessly between a traditional desktop, mobile phone, tablet or even a smartwatch and stay in sync on any device.

Data accessibility and native CRM integration to equip frontline workers with the data they need to understand their customers and exceed their expectations. With Talkdesk On The Go, field workers can access essential contact center and CRM information–in one mobile application–so they have the context and tools needed to provide great service.

Enhanced productivity and hands-free flexibility to help field teams have more control over how they manage routine tasks.

Talkdesk On The Go leverages mobile devices' built-in automation applications and voice-activated personal assistants, creating richer capabilities that result in extra efficiency when updating statuses, accessing contacts and making or receiving calls.

Easy adoption and use, as Talkdesk On The Go can be instantly downloaded and used on a tablet, smartphone or smartwatch, making it quick to implement and adopt for mobile workforce employees.


Expert Insight: "The Talkdesk On The Go mobile app is perfect for team members who work between different locations, such as our London office and off-site warehouse. It enables them to take calls and effectively go about their day, whilst still capturing the call data."

— DAVID WHITESIDE, GENERAL MANAGER FOR LONDON, ONEFINESTAY

To learn more about how **Talkdesk On The Go™** can help your mobile workforce, or to start a free trial, **contact us.**

An End-to-End Solution for Delivering Great Customer Experiences
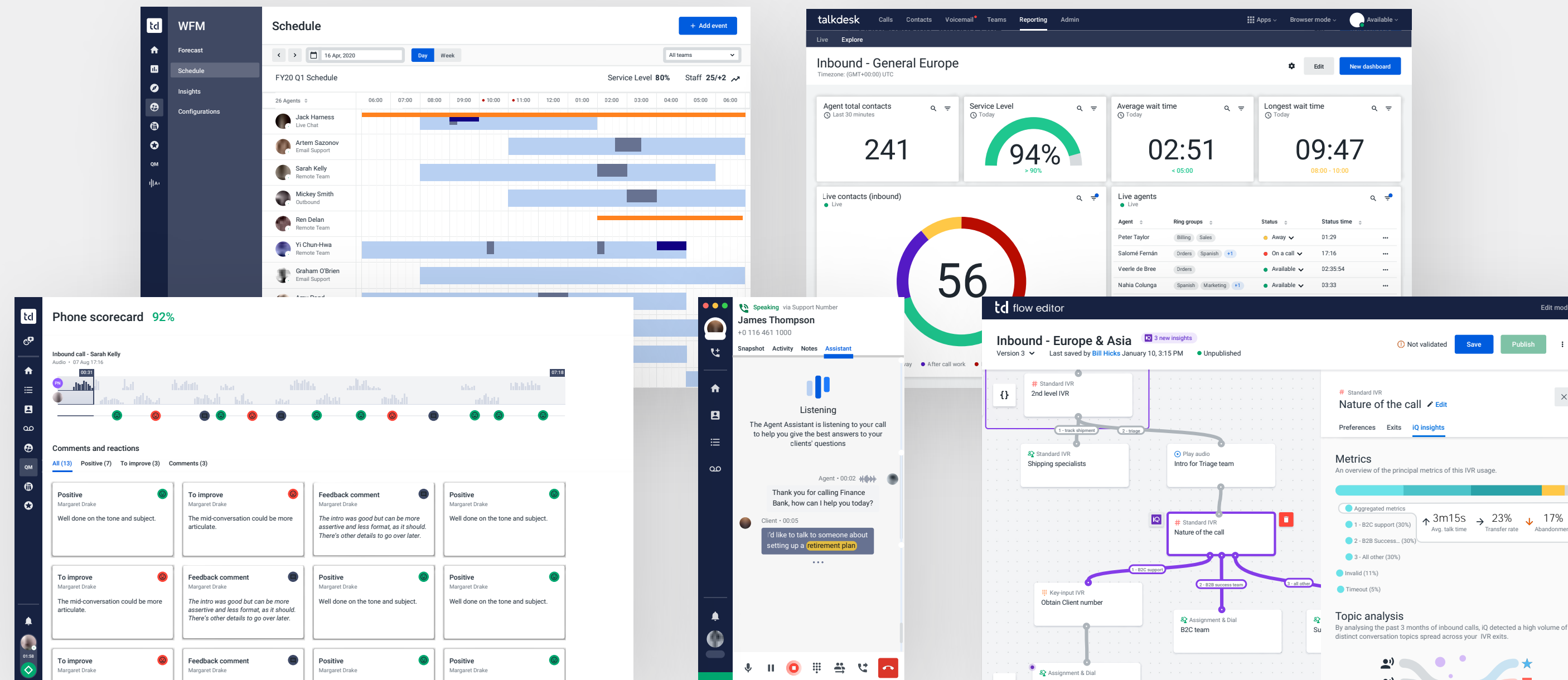
talkdesk®

+1 (888) 743-3044

www.talkdesk.com

Talkdesk® is the cloud contact center for innovative enterprises. Combining enterprise performance with consumer simplicity, Talkdesk easily adapts to the evolving needs of support and sales teams and their end-customers, resulting in higher customer satisfaction, productivity and cost savings. Over 1,800 innovative companies around the world, including IBM, Acxiom, 2U, Trivago and YMCA, rely on Talkdesk to make customer experience their competitive advantage. Learn more and request a demo at www.talkdesk.com