



**OPTIMIZING THE MULTI-CHANNEL AGENT DESKTOP:  
EMPOWER YOUR CUSTOMERS AND FRONTLINE EMPLOYEES**

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## EXECUTIVE SUMMARY

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Think about a time you had a terrible experience dealing with customer service.

Perhaps you waited on hold for an eternity, or sent an email and the reply took days, if it came at all. When you finally connected, you had to repeat information you'd already provided and the agent, who didn't have access to the information you needed or a record of your past interactions, seemed more interested in ending the call than solving your problem. When the call did conclude, the agent tried to pitch you a service that you either already have or that is not relevant to you.

It's natural to blame a poor service experience on the person who delivered it. The human factor is an undeniable part of any service problem, particularly in the high-turnover, time-pressured, cost-conscious, world of the contact center.

But usually contact center service failures can trace their root cause back to the technology and process that agents use—systems that are difficult to navigate, do not give ready access to vital knowledge, and do not provide multi-channel integration to give agents a clear picture of who customers are and how to best assist them.

Too often, agents must toggle between multiple applications on their desktop, rely on their own experience or tribal knowledge to answer questions and cut and paste in order to forward customers the information they need. These methods are neither reliable, consistent, or efficient.

Companies need to provide the contact center with a multi-channel desktop that both supports and enables an effective customer experience management strategy, enabling the contact center to:

- Provide first contact resolution
- Increase agent productivity
- Deliver cross-channel support and visibility
- Help turn the contact center into a revenue generator
- Make life easier for your customers

It's important to arm your frontline employees with the tools they need but it's also important to give your customers the ability to help themselves. These two strategies should complement each other and result in an improved customer experience.

Managing a multi-channel contact center is no easy task, but with the right tools and processes, your customers and agents will be happier, your business will be more efficient, and you'll reduce costs and generate revenue.

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## WHAT'S DRIVING CHANGE?

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It's safe to say that customer service is important. But businesses have come to understand that, in a globalized and commoditized marketplace, the customer experience is as, or more, critical to growth than the product or service sold. 91 percent of decision-makers surveyed by Forrester Research, said elevating their customers' experience was a mission-critical goal in 2008, and 68 percent planned to increase their spending in that area.

Companies are also realizing the contact center plays a vital role in creating that customer experience. Today, there are several key factors driving the need for a better, multi-channel desktop solution for contact center agents:

- **Increasing customer expectations.** Simply put, customers are becoming more demanding. They can now get what they want, when and how they want it. Consumers are establishing the terms and setting the requirements of how they want to engage with a company. If a company can't meet those expectations, there are plenty of competitors that will.
- **A focus on customer retention.** The adage is that it costs less to retain a customer than it does to get a new one. However, each year most companies lose 10 to 15 percent of their customer base. There is less consumer loyalty today, making it difficult to compete over the long term on either price or product.

Since competition is even tighter in an uncertain economy, companies must exceed expectations to differentiate themselves in the marketplace. The contact center plays a vital role in differentiation since the majority of interactions with the consumer happen in the service center.

- **Service is the new sales.** Having optimized sales and marketing structures in recent years to attack expenses, companies are turning to the contact center as a resource to drive top-line growth.

Alan Hubbard, of the Aberdeen Group, points out that cross-selling and up-selling in the contact center is an opportunity to establish competitive differentiation, and that simply driving down costs is no longer a viable solution.

Also, because do-not-call regulations have restricted companies' ability to reach out to prospects, it's essential that they maximize the selling potential within any direct customer interaction. Additionally, when customers call a contact center, they are calling on their terms and are more likely to be receptive of cross-sell and up-sell opportunities.

- **Access to Information.** The ever increasing numbers and complexity of available products and services continues to drive up customer inquiries. It is more critical than ever for contact center agents to be able to easily access a knowledge base in order to provide the level of service the consumer expects. The risks of getting service wrong are greater now since stories of poor customer experiences find their way rapidly into the public domain via social media.

Consumers are also becoming savvy users of today's advanced web and voice self-service channels. If they do need to speak with an agent, they are probably already educated to a point and the agent needs to be able to catch up quickly in order to help.

## WHAT'S HOLDING THE CONTACT CENTER BACK?

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Contact centers are being asked to meet conflicting objectives. On one hand, they need to provide exceptional service to a growing base of customers; on the other, they are being required to increase efficiency and maintain—or reduce—headcount and operating costs. They turn to technology to achieve both.

While most companies don't lack contact center technology, they often lack the right solution to address this dilemma. Usually, contact center platforms have been cobbled together over time using a number of different tools and systems. These patchwork systems usually don't scale and were not purpose-built to account for the customer experience across different channels. They are also inefficient. Agents must often toggle between multiple applications to handle a service request.

Companies without an integrated, multi-channel solution can struggle with:

### Poor customer experience

Today, customers expect to contact companies using any number of channels and to be able to switch between them at their convenience. But, simply providing channels and not integrating them is not enough.

When a company does not have an integrated solution, its customers must repeat information they've already provided. Customers are especially unforgiving when this happens in a single interaction, such as when they enter an account number using the IVR at the beginning of a call and then are asked for this same information again.

Agents may also not be aware the customer has already contacted the business through other channels. So even if a customer has already had an email or chat exchange with the contact center, they may have to go back to square one when they get an agent on the phone.

Finally, without seamless incorporation of the knowledge base into the agent desktop, contact center employees have difficulty giving consistent, expert answers for questions about an ever-expanding number of products and services.

### Strained productivity

In addition to being tasked with providing an exceptional experience, contact centers are challenged to maintain high productivity—handling the greatest number of customer contacts with the least amount of staff. Without an effective, easy-to-use agent desktop, productivity suffers, response time increases, and customer satisfaction drops.

Many legacy contact center systems do not provide sufficient visibility into individual agent, and overall call center, performance that would enable organizations to refine performance.

Finally, contact centers typically contend with high staff turnover. Without an agent desktop that incorporates an integrated knowledge base and an intuitive user interface, new agent training time increases and overall productivity suffers.

### Channel inconsistency

Customers expect to receive the same information regardless of the channel they use or which agent answers their call.

Without integration across the service channels, agents may not be aware of interactions customers have already had. And without an embedded knowledge base, agents can't provide information that is consistent with information provided via other channels and other agents.

Savvy customers have learned to exploit companies' inconsistencies, contacting multiple channels or agents until a favorable response is obtained.

## THE MULTI-CHANNEL AGENT DESKTOP

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Companies need an agent desktop that incorporates the best of the contact center into a single application. The agent desktop should be tightly integrated with both the knowledge base and other service channels in order to provide agents with ease of access to information and complete visibility into customer data and history. Additionally, the application should provide management with analytics and reports to gain better insight into the service they provide and help improve performance.

An integrated, multi-channel agent desktop enables companies to achieve drastic improvement in three key areas:

**1. Optimized customer experience.** Companies know when customers have contacted them, what information or offers were provided, and what resulted, and can make this information available to the agent. Customers are not asked to repeat information, and agents can effectively answer questions or seamlessly escalate callers to the appropriate service resource.

As a result, customers are more satisfied, leading to improved retention and increased cross-sell and up-sell success. Companies are also provided with more complete, consistent views of customer interactions, augmented with real-time feedback, which is made available to both agents and managers. Companies are able to differentiate their products or service based on the customer experience, rather than price.<sup>vii</sup>

### CASE IN POINT: CARFAX

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The business model of vehicle history information provider CARFAX includes the goal of providing superlative customer service exclusively through online channels. The company provides customers with both web-based self-service and email contact center options. CARFAX needed a contact center support system that would help it achieve that objective while cost-efficiently supporting a rapidly growing business.

Deploying an integrated contact center platform that connected these channels to the CARFAX knowledge base has helped the company achieve a 98 percent self-service success rate. Thanks to the integration of the contact center platform, within three weeks after deployment, so many customers were finding their own answers online that the company's email workload dropped by a full 50 percent. This generated significant cost savings and substantial improvements in customer satisfaction.

Equally important, providing agents with easier access to the knowledge base has enabled agents to answer most emails within 90 minutes. Even though CARFAX's business has doubled in size since it first deployed the system, the company has actually been able to reduce the number of contact center staff devoted to answering emails by 14 percent.

The system's reporting capabilities have also had a significant impact on CARFAX's business. By closely tracking customer issues and dispositions, CARFAX has gained tremendous insight into its customers' needs and concerns. Also, because it is a fully web-based application, CARFAX can extend its functionality to anyone, anywhere, any time. That means CARFAX can retain experienced customer service agents who move away or need alternative work arrangements.

**2. Enhanced agent productivity.** By having an integrated desktop, agents can solve problems more efficiently, effectively and elegantly. Agents have access to the knowledge base right within their desktop application within an environment purpose-built for agents.

Also, by incorporating scripting, the agent desktop will present only the information and screens to the agents that are relevant to the interaction that they are having with that particular consumer. Agents can also control and configure the desktop environment to view information in the way that they can best utilize.

### **CASE IN POINT: ELECTRONIC ARTS (EA)**

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As the world's leading independent producer of electronic games, EA faces serious customer service challenges. Millions of users worldwide play EA's numerous games on a variety of platforms. Today, more than half of EA's customers play online, and EA anticipates that number to significantly increase as new products are released. The problem is, online games generate ten times as many incidents as their conventional counterparts.

Over 80 percent of EA's first- and second-tier phone and email support is handled by outsourcers around the world. Third-tier support is handled in local, strategic locations with the management team located in California. Choosing a web-based, on-demand contact center delivery model has proven to be ideal for EA's globally dispersed service operations.

Because access to the system is provided via the web, everyone shares a common incident management system. This allows EA to dynamically assign responsibility for specific tasks anywhere in the world to meet fluctuating demand without having to worry about provisioning additional servers or installing software on an outsourcer's agent desktops.

By utilizing on demand contact center technology, EA's customer service organization has been able to cost-efficiently support the company's continued growth and market dominance. In fact, over the past two years, it has successfully handled both a 50 percent increase in incident volume and a 10 percent budget cut—while still delivering first-class support.

This hosted environment also gives EA managers full visibility into all support activities and metrics. They can see how all incidents are handled, perform Quality Assurance and monitor outsourcer performance. They can also run reports on individual contact center staff members in order to award performance-based bonuses.

Gamers can also access knowledge bases directly from within some of the games—enabling them to get fast answers to their questions with minimal impact on their gaming experience. As a result, the knowledge bases—which serve up millions of answer-views per month—have relieved EA’s staff of having to handle routine questions, freeing them up to handle other issues, such as customer emails.

EA’s support staff replies to most customer inquiries with a click of the mouse on the relevant item in the integrated knowledge base to quickly provide the appropriate answer. They can also immediately see if there has been a prior email exchange, so they can avoid giving the customer redundant information.

**3. Multi-channel consistency.** An integrated, multi-channel agent desktop ensures that the knowledge a company delivers to a customer is consistent regardless of the channel or agent. Not only does this improve customer satisfaction, but it avoids providing inaccurate information that may incur liability. Companies also obtain a complete picture of interactions that occur with consumers over time.

### **CASE IN POINT: IOMEGA**

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When it comes to customer service and support, storage solutions market-leader Iomega Corporation faced a significant challenge. On one hand, the company needed to deliver an exceptional customer experience in order to maintain both its leadership in a highly competitive market and the power of its premium brand. On the other hand, market pressures make it essential to keep operational costs under control, so Iomega has to provide great support as cost-efficiently as possible.

Compounding the challenge was the fact that customers will often initiate chat sessions or phone calls with different agents on different days. “In a contact center environment where you’re managing each of your communication channels separately, the customer will have to explain the problem again and explain what the first support person suggested before the second support person can start resolving the situation. That’s aggravating to the customer and a big time-waster for your staff,” says Mike Nikzad, vice president of customer relations at Iomega.

Iomega chose an integrated, multi-channel contact center environment that enabled its customer service operation to quickly and efficiently resolve problems around the world via phone, email, chat, and the web. The integration of the agent desktop with other resources, such as Iomega’s customer database and its RMA system, further streamlines the service processes.

With the integrated, multi-channel application, all interactions with the customer are maintained in a common knowledge base. All information about outstanding customer issues is available in one place regardless of what communication channel is used at any given time. And, thanks to the system's on demand architecture, the close alignment of its functionality with Iomega's business needs, and its ease of customization, the solution has done so at a favorable cost/benefit ratio.

## WHAT IT TAKES TO GET THERE

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More often than not, companies that struggle to deliver powerful customer experiences do not lack contact center technology; rather, their agents are saddled with ineffective applications and an absence of ready access to vital knowledge.

Today, businesses need an advanced agent desktop that enables the delivery of exceptional experiences. This solution is defined by four essential characteristics.

**Modularity.** Companies can no longer afford to spend months in development and deployment to bring a new system on line. As noted in CIO Magazine, on demand, software-as-a-service (SaaS) solutions can be rolled out quickly with a sharp reduction in costs incurred on servers and administrative staff.

They are more cost effective because the service provider is able to leverage its economies of scale in its core capabilities to deliver the most robust agent desktop features at the most competitive price point. In the SaaS model, service providers offer the infrastructure needed to host and manage the agent desktop without requiring companies' IT resources.

**Scalability.** As business grows, it's important that the agent desktop grow with it. The solution should be designed for high volume of consumer interaction that occurs in a contact center, and the solution provider should have proven its ability to maintain the highest levels of system uptime.

**Usability.** How quickly and successfully agents are able to capitalize on the capabilities of a new agent desktop is directly related to how easy the system is to use. The desktop should be purpose-built for the contact center and provide contextual workspaces to give agents a "heads up" display of the essential information needed to handle a customer inquiry and present relevant cross-sell offers. It should also provide agents with intuitive drill-down capabilities to quickly resolve complex issues.

**Adaptability.** The agent desktop should deliver real-time feedback to agents and feed data seamlessly to the customer experience management platform to provide visibility into client interactions and enable contact centers to continuously improve performance.

It should incorporate emotion detection and other proven call monitoring capabilities to resolve and avoid problems. The solution should also integrate feedback across channels, from pre- to post-interaction, which enables agents to continually refine their performance.

Look for these critical capabilities when assessing an appropriate solution for your company. In order to deliver an exceptional customer experience that differentiates your enterprise and drives next-level growth, it's vital to ensure that you can capitalize on these essential strengths.

CARFAX, EA, and Iomega saw that in order to improve their customer experience, they had to both enable customers to help themselves, and give their contact center agents multi-channel visibility. By leveraging self-service, their customers got answers to simple questions quickly which frees up agent time for more complex inquiries. Their agents are happier too since they spend their time on more challenging and less monotonous issues and they can easily share information across their organizations.

More and more companies are changing their contact centers from a financial drain on their business to cost efficient help centers equipped with the tools to make the right offers at the right time and generate revenue.

Your business could be next.

## **ABOUT RIGHTNOW**

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RightNow (NASDAQ: RNOW) delivers the high-impact technology solutions and services organizations need to cost-efficiently deliver a consistently superior customer experience across their frontline service, sales, and marketing touchpoints. Approximately 1,900 corporations and government agencies worldwide depend on RightNow to achieve their strategic objectives and better meet the needs of those they serve. RightNow is headquartered in Bozeman, Montana.

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[Contact us](#) today to find out how we can help you create the best possible customer experience for your customers.

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