

*A thinkJar Thought Leadership Series*

# Creating Highly Engaged Customer Service Employees

How technology and processes in a digital transformation framework helps organizations create engaged employees and reap the rewards

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A US-based utility company routinely solicits input from their employees on how to improve their operations. Following a thorough process of analyzing and ranking ideas, they implement around 30% of the recommendations. On average, a recommendation can save \$4,000 a year – except when the recommendations come from the most-engaged employees where they save between \$11,000 and \$15,000.

Why the difference?

Engaged employees commit more time and effort to making sure the company runs as best as it can, often resulting in triple or quadruple the savings in ideas submitted – but also thousands more satisfied customers, and productivity gains between five and ten percent per a study by Gallup.<sup>1</sup>

Lately the concept of engaged employees, and associated research, has come to the forefront. Research proves that engaged employees perform better, deliver more successes, and affect the core metrics and KPIs for the company the right way. This applies to customer service as well, where engaged CSA (customer service agents) have been shown to churn less, be more productive, and deliver higher levels of customer satisfaction.

Yet, less than 26% of employees are highly engaged<sup>2</sup>. How can an organization create highly engaged CSA? There are three aspects to doing so. People, Process, and Technology.

Cultural changes, as those required to hire different people or to attract different managers, and change management are long-term, transformational initiatives beyond the reach of technology and beyond the reach of a white paper recommendation; books have been written and classes have been taught about the subject. While they will always be present in corporate initiatives to transform the business and its processes, there are faster and easier ways to effect change and obtain results.

The rest of this writing will focus on the most effective, and quicker, ways to change: implement the right tools and optimize the customer service processes.

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<sup>1</sup> <http://www.gallup.com/businessjournal/26281/First-Element-Great-Managing.aspx>

<sup>2</sup> <https://experiencematters.blog/2016/12/02/only-26-of-u-s-employees-are-highly-engaged-how-engaged-are-your-employees>

## Implementing the Right Tools

Looking back at the research we produced over the past few years, the biggest complaint from customer service agents was the lack of quality tools to do their job. There were either too many disconnected solutions, not enough, or not good enough to help them do their job. Due to vendors' focus on making CSA happier and more empowered, and their employers by extension, we noticed a change in the past three years in our research and the solutions we see in the market.

The agent's tools used in contact centers are fall under one of two categories: Problem Resolution or Agent Support Tools.

Problem resolution tools have seen the largest innovation in the past five years. The rise of self-service via the web<sup>3</sup>, the expansion of the same into other channels, and the emergence of communities and social channels to complement the tools traditionally associated with the agents' jobs have all led a marked evolution on how service issues get resolved. Whether it's customers themselves using self-service tools (via myriad channels), agents using social tools to engage deeper with (and more quickly help) customers, or customers finding that many of their questions and problems can be solved without involving CSA, today's market finds customers solving their issues faster, and easier, than before.

And while this may seem counterintuitive, we see an increase in agent's engagement agents because customers are finding the answers or solutions to simple problems by themselves – or within communities. This gives agents the time to focus on more complex issues and more advanced questions, the type that will make them feel gratified by helping customers and bring meaning to their jobs. Finding a rewarding career with challenges where they can make an impact is what makes customer service employees more engaged these days – and leaving out the “easy questions” out of their job accomplishes this.

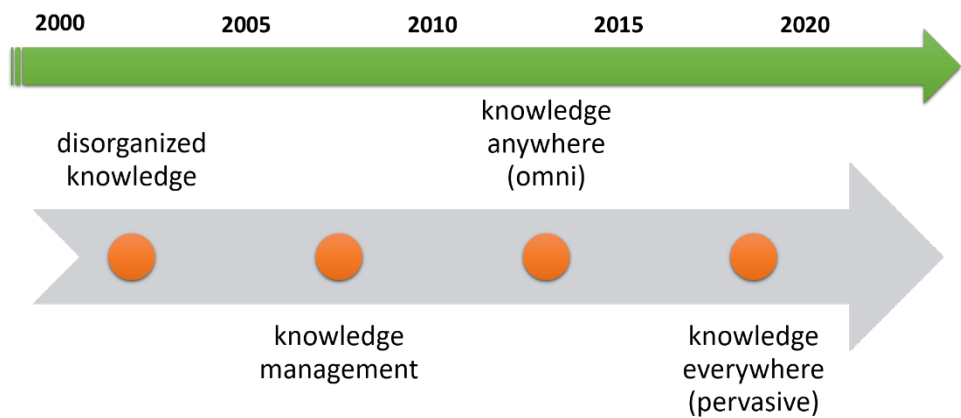
Research conducted by thinkJar in 2016 shows that more than 60% of CSA are looking for better careers as the defining factor to engage further in their roles including better career paths, more satisfaction with their jobs, and more complex assignments. In addition, less than 30% indicated that heavy customer load was a problem and just 15% indicated that the tools were to blame for their lack of engagement in contrast with results from just three years prior.

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<sup>3</sup> [http://blogs.forrester.com/kate\\_leggett/16-01-28-online-self-service-dominates-yet-again-why-its-an-effortless-way-to-get-to-your-answers](http://blogs.forrester.com/kate_leggett/16-01-28-online-self-service-dominates-yet-again-why-its-an-effortless-way-to-get-to-your-answers)

Among the evolution of the problem resolution tools, past the auto-resolved nature of communities and self-service, we have seen a significant innovation in knowledge management. The complaints from year's past, from CSA, were centered around the lack of the right information in the right format: a search on a knowledgebase usually returned many potential answers, not necessarily the one needed. This led to increasing stress on agents, and was the most often cited reason to quit their jobs.

New progress in knowledge management: integrating tools into a common screen, embedding knowledge in different devices and functions, and leveraging experts where they are having all contributed to shortening the process of finding the answer and reduced the CSA stress.



These advances also created more dynamic and more complete tools than ever before. The simplification of the technology for customer service agents have meant that the problem resolution tools are finally at the level expected for them to do a good job.

As for agent support tools, we are seeing better results come from improvements in performance management – aligning the best results with the best agents. The three advances that have had the largest impact in the job have been the expansive use of performance management tools, leveraging analytics to deliver better outcomes, and integration between all components in the enterprise to allow CSA to become better at their jobs. This has become the baseline by which they judge the tools used to do the job: can I find the right information, make sure I am doing it right, and discover how to become better at my job?

Performance management used to be tied to efficiency-driven metrics like number of calls answered, or duration of each call. This created a requirement for agents to meet artificial quotas that were not related to delivering value to clients or fulfilling their purpose in the job. As the “Age of the Customer”<sup>4</sup> grew, organizations found they needed a more effective, not more efficient, method to measure their success – one tied to customers’ needs and expectations.

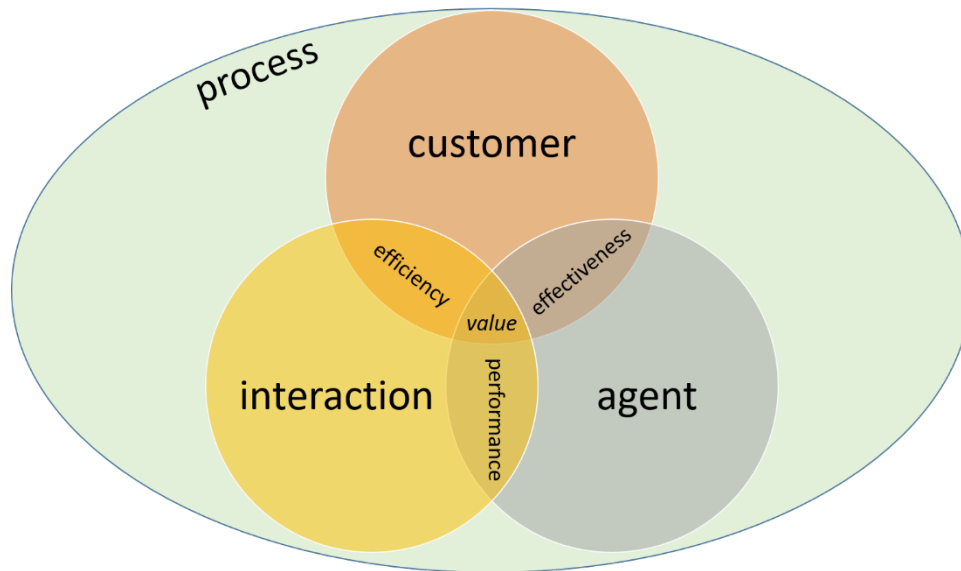
Managers and agents began to understand the demands and needs of the customer, adapted metrics to support them, and found necessary to correlate feedback from customers to the right agent and the

<sup>4</sup> <https://go.forrester.com/age-of-the-customer/>

right action. The tools implemented helped identify, optimize, and reward the right actions from the customers' perspective, and used the outcomes to further optimize the processes.

This meant a shift in performance management tools that focused on rewarding the agents for their efforts on delivering value to the customer – not just performing better for the organization. By turning the model around, focusing on the customer and their needs, the organization ensures engagement with the customers by delivering value at each interaction. The picture below shows the different metrics and how value is an aggregate metric of all actions and functions.

The use and tracking of these metrics more closely monitored led to customer service applications more focused on analytics (including dashboards and real-time interfaces) to optimize the right moves and quash the wrong ones quickly. If an agent found a new way to deliver value the information can be distributed to other agents far faster, and easier, than ever.



The use of analytics is the preliminary step to using optimization algorithms to find a path to artificial intelligence and machine learning. Eventually, we will see automation of the simple interactions with better performance and accuracy to let the agents focus on the interactions that

matter most: the exceptions and “one-of” that they should be focused on.

Better integration between these tools, and with other areas of the enterprise, and better CSA interfaces create more productive agents. These integration tools bring together learning systems, field service, knowledge management, and other systems that can be used to deliver better experiences for customers. These better experiences result in engaged CSA that like their challenging jobs, as opposed to feeling like they are repeating rules and regulations to customers over different channels but never resolving their issues.

Integrating all these tools and solutions together for the CSA deliver a more complete picture of both the customers' information as well as the many facets of the organizations' s information and delivers a better framework to attract and keep satisfied the best employees.

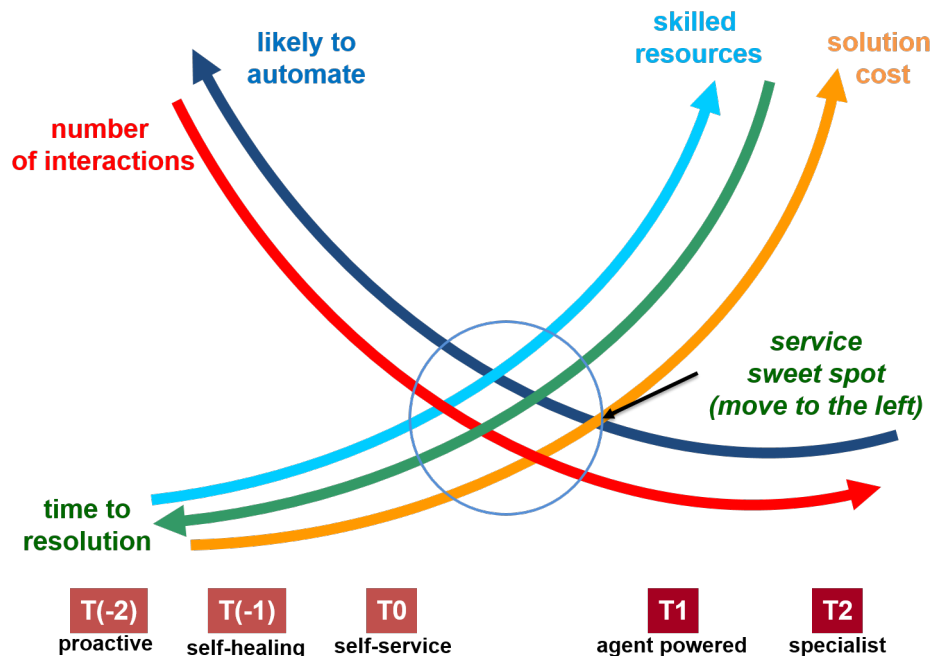
## Optimizing the Processes

The move to transform organizations amidst digital transformation initiatives has not escaped the realm of customer service<sup>5</sup>. The challenge, as it is for all other areas of the organization, is to find out the right data and the right model to use to mold the new processes insofar as digital transformation is about optimizing processes by utilizing data better in search of optimized results.

The shift from efficiency to effectiveness for data has shifted the focus from operations to customer's requirements and perceptions of the results. While this is good, it does not truly fit within the mission of customer service. The goal of customer service, unwavering, is finding the balance between delivering answers and reducing costs. As more than half (and closer to 90 percent in certain situations as evidenced in our research over the years) of the interactions between the customer and the company happen via customer service, organizations are keen on finding a balanced model.

Digital transformation for customer service does not only come from using data to optimize processes but also using the same data mixed with knowledge and content to move along the service timeline (shown in the picture below) to more effective customer service. The focus on better data to deliver more effectively via proactive customer service or self-healing applications is what propels the digital transformation of the customer service department.

In addition to the rise in self-service applications in the last decade, we are seeing a renewed effort at using embedded knowledge and proactive customer service to deliver more effective solutions to customers in a more efficient manner. Organizations are constantly seeking better ways to empower their



customers, their agents, and to use the best knowledge to resolve issues. To accomplish this, a focus on analytics, data-based decisions, and machine learning with automation is fundamental. This is what drives the resolution to the lowest costs (but also highest satisfaction if done properly) functions of

<sup>5</sup> <http://estebankolsky.com/2015/02/stop-talking-about-digital-transformation/>

proactive to self-service. It also liberates the employees to tend to the more complex problems (which, as explained before, makes them more engaged).

Using machine learning and artificial intelligence is the next logical step to self-service and automation: once the customers (and the company) trust the value of the automated reply that the system can produce they will be more inclined to use them – raising the engagement from the customer perspective. However, the biggest value of machine learning is not to automate the simple problems but to take advantage of the knowledge and resolution data that emanates from solving the less common, more complex, problems and finding the way to proactively handle them – or find a way to automate the resolution.

This knowledge will be used both to further automation – but also to allow CSA to solve customers' issues faster and better thus creating more fulfilled, and engaged, agents. The myth of machines taking over 100% of the customer service inquiries is based on technology that is not feasible in a contact center yet; agents fill in the need to ultimately deliver value to customers when technology cannot. We must ensure that all processes have an escape method from automation to agents as necessary.

The vendors and technologies that are more in tune with the customer service needs today are beginning to offer machine learning platforms that can tap into the operational data, resolution knowledge, and other customer and product data to find the best way to generate the right information to solve problems that don't yet exist. Indeed, by analyzing what customers are doing, what products they use, and cross-referencing that to operational data the organization can find the places where potential problems will occur and either deploy solutions via embedded and self-healing systems, or proactively notify the customer (or even the systems, using IoT and related technologies) and resolve the problems before they occur.

This evolution of customer service, to where there is no interaction between customer and company but rather the company handles problems before they occur automatically, provides the lowest-level cost for the organization and the highest level of satisfaction for the customer. As it has been said many times before – there is not better customer service than no customer service<sup>6</sup>.

Even better, by letting customers and systems solve the “easy” problems, we let CSA handle the challenges that make highly engaged agents.

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<sup>6</sup> <http://www.destinationcrm.com/Articles/Web-Exclusives/Viewpoints/The-Best-Service-is-No-Service-49244.aspx>

## Next Steps

By now you are convinced that this is something you need to do, you want to attract and retain highly engaged CSA; you are unsure where to start. The following six steps will help you get the ball rolling:

1. **Ensure Management Buy In.** the environment in which highly engaged CSA excel and remain is very different from a traditional customer service operation. There are people, processes, and technology (and metrics) changes that will impact not just the division but the entire company. Without the proper management buy-in most of these changes cannot happen. This is not a grassroots effort – this is a long-term initiative that changes the way the organization works and must be endorsed and supported by the proper management to have staying power.
2. **Create a Strategy.** Although it sounds like common sense advice, the number of changes and the variety of the same require that a certain order be followed to achieve the sought goals. Hiring the “right people” without having the right tools – for example – would be a mistake. Also, not using technology would obviously delay the deployment. What are the specific steps your organization must take – and in what order? This is the question that a strategy answers.
3. **Build a Framework.** A framework is nothing more than a collection of questionnaires and planning tools used to gauge the potential for a specific task to be successful and align the right resources behind its success. Because each organization achieves success in different ways, different questions and different tools will be used – but the basic principles highlighted in this document will provide the basis for building your framework to align your new service solution with your strategy.
4. **Align your Partners.** No organization can be successful in this transformative process by working alone. The technology used will be transcendental for the success of the deployment and thus you need to ensure the right vendors, the right technology partners are aligned with your success. If their goals and roadmaps don’t follow your strategy it is unlikely you will get to what you want. Align your partners’ strategies with yours and make sure they work together.
5. **Seek Help.** Truth be told, someone already either did something like what you are trying to do, or is in the process of doing that. Trying to go about it all along is not the best way to succeed. Find the people that can help you by relating their lessons learned and sharing their methodologies. Seek the consultants that have experience in this sort of endeavor, reach out to peers and other practitioners, ask the questions and then share your experiences. A collaborative approach will yield better results faster.
6. **Implement Slowly, and Consistently.** As with any other long-term initiative, things will change along the way and you will need to adapt to them. One of the examples is the advent of social channels and communities in the past five years – or the rise of artificial intelligence. These changes will bring a new way to use technology, or change processes, that you may need to adopt. Slow and consistent implementations along the planned strategy, periodic reviews to that strategy, and agile frameworks that allow for changes along the way will be the sure way to succeed with this changes.