

# 2022 Guide to Leading an Agent-Centric Contact Centre

Metric Sherpa | RingCentral



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# A Shift to Agent Centricity

SPOILER ALERT: Finding and retaining great talent was never easy. But now? Effectively staffing and engaging employees in your contact centre might feel like you're on an impossible mission.

A glance at the [2022 Contact Centre Challenges and Priority Study](#) by Contact Centre Pipeline sums up the perfect storm faced by today's contact centre leader. Forty one percent of respondents cited their biggest challenge as difficulty when hiring and recruiting.

**23%**

**noted an increased workload and rounding out the top three**

**19%**

**said high attrition rates**

Put it all together and you'll spot an ever-widening gap in the work to be done and the people who are willing and available to do it.

You know this already. You've tried to combat it by offering new benefits and perks, increasing wages and incentives and expanding your offerings around working from anywhere. But that approach to the problem, in this current market, is not unique to your business. It's become the new expectation. Finding and retaining people now means looking beyond what appears on a pay stub and toward the things that create deeper meaning in work and show greater respect for the worker.

- It's deploying systems that make the agent's more effective at doing their job – not sending them into a quagmire of tools and technologies.
- It's designing processes that enable success, empower the employee and eliminate transactional work – not hindering their ability to deliver authentic, human experiences.
- It's finding and engaging people in work with purpose, providing a platform where their voice is heard and respected and demonstrating a



true understanding of the realities of their work – not underestimating or missing out on the value that a truly empowered employee can bring to the business.

Simply put, transforming your contact centre and the fundamental challenges it faces today means adopting an agent-centric view on your business. Your agents are a powerful conduit by which customers experience your brand and, when done right, they're the mechanism by which your business unleashes its real competitive advantage.

In this eBook, I'm aiming to expose the real reasons why employee turnover continues to be a problem, why delivering consistently great customer experiences remains elusive for most businesses and the unintended, negative effects of some commonplace contact centre practices. More importantly, I'll share how the best path to overcoming these obstacles is to embrace an agent-centric approach to how you design, deploy and lead your contact centre and customer experience strategy.

Read on and I'll arm you with the tips, tricks and insights that will enable you to grow your team's productivity, elevate their satisfaction and ultimately deliver exceptional customer experiences predictably and at scale.



**–Justin Robbins, President, Metric Sherpa**

# The Potential in Our People

There's an old way of thinking that's plagued the contact centre for far too long. It goes something like this, "The contact (or call) centre is an entry-level entity that's built to drive efficiency." It dates to their early decades of existence, the 1960s, 70s and 80s when businesses realised that they could save money and maximise their resources by pooling people together. In those days, customers didn't have many, if any, other options to contact a business. Most of the interactions were highly repetitive and transactional. Well, jump ahead by sixty years and, sadly, you'll still see businesses who believe that this is still the primary role of the contact centre and, more harmfully, the purpose of the agent.

I'm not entirely clear on why that's still happening because the evidence against it is compelling. A shift to agent centricity will actually improve efficiency, but it doesn't stop there. Here's what one business discovered when they pivoted from an efficiency mindset to one of agent centricity.

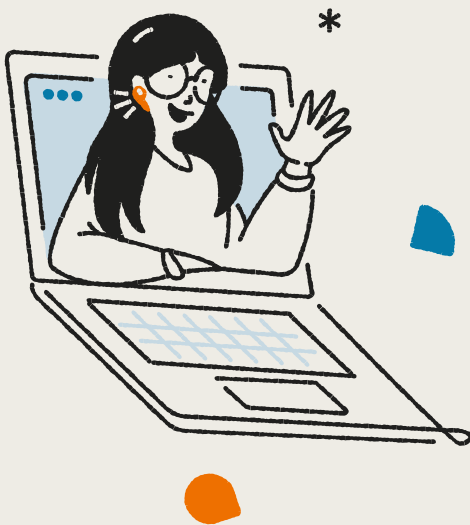
Have you ever wondered what the most common type of inbound contact is at a drone company? Me neither, but that didn't stop one contact centre leader from letting me in on his businesses dirty laundry. His story is a valuable lesson in leading an agent-centric contact centre.

"Fly-away drones", he started by saying, "are the number one thing that my contact centre agents deal with every day." As it turns out, most people get really excited about their new toy (cause let's face it - unless you're in real estate photography - a drone is a discretionary purchase) and don't take time to read the lengthy instruction manuals before their first flight. The drone takes to the sky and up, up, up and away forever it goes.

"And what's our obligation to the customer at that point?", he continued. "Too bad, so sad, do you want to buy a new one?" Unsurprisingly, most

people use the interaction to unleash rage, frustration, disgust and certainly weren't interested in making a purchase that would likely end in another disaster.

His business found themselves in a precarious situation. They felt the need to staff their contact centre to accommodate this inbound volume but didn't want their employees spending a lot of time on these interactions. (Which, as a reminder, was their highest driver of volume.) They initially believe that the best way to address this was to focus on a high level of efficiency that took a very close looking at average handle times and encouraged employees to crank through high numbers of these interactions. The goal was to get people on and off the phones as quickly as possible. It kept their costs down and satisfied a simple expectation: mitigate the expense of responding to flyaway drone complaints.



"Our agents felt beat-down and worn-out, our customers certainly weren't driving word of mouth referrals or repeat revenue and it was clear that the contact centre team was, at least internally, perceived as a necessary evil," the contact centre leader told me. He went on to say, "I started to wonder if there was an alternative solution to our problem. A way to have a more profound impact on the people we served. Whether it was our company's shareholders, our customers or our very employees." On his hunt for ideas, he decided to start with the people who were closest to the problem - the contact centre agents who dealt with this conversations every day.

He began a series of one-to-one conversations with his team, essentially asking for their insights on things that the business should start, stop or continue doing. These discussions surfaced challenges with some of their tools and processes, revealed suggestions for new packaging and sparked an idea for the development of new customer training materials. He said that the conversations were electric. Employees were filled with input and showed a genuine interest in helping solve the problem at hand. Once the conversations were complete, he engaged leaders from their product teams, started a regular collaboration session with marketing and forged new partnerships across the business. "It was a clear move from our old, reactive nature to something new, exciting for all of us and collaborative from our contact centre teams to our chief executive suite."

The results, however, are what's most astonishing. This collaborative motion that began by empowering the agents and centring around ensuring their success, drove a new chapter for the company. The new packaging, training materials and agent-facing toolset, enabled them to drive a reduction in fly-away drone contacts by over 80%. But it didn't stop there. With fewer fly away drones, customers were actually able to enjoy their purchases and wanted to share their experience with others. The business saw exponential growth in return customers, gained

massive traction through word of mouth marketing and best of all, had a record year for employee retention and satisfaction scores. Oh and that efficiency piece? The total reduction in volume from addressing the root cause of their number one contact driver saved the business millions of dollars each year that they were able to reinvest to driving new products and revenue lines.

“I don’t know what took us so long to focus on better serving our agents and customers,” he closed with, “but now that we have - there’s no looking back.”

Starting to believe that the shift is right for you? The first step in the shift to agent-centricity is to change the way you think about the role of the contact centre and the people who enable it to reach its full potential.

Brad Cleveland is the author of *Leading the Customer Experience* and a Founding Partner of the [International Customer Management Institute](#). In his first book, *Contact Centre Management on Fast Forward*, he explores the three levels of value that a contact centre can provide. Let’s look at those three levels and evaluate their impact on how we staff the agent-centric contact centre.



## Level One: Efficiency

Going back to their origin, contact centres were designed with efficiency in mind. It’s why we have queue groups, forecasting models and metrics that enable us to understand how we’re using our resources. One of the greatest shifts for the modern contact centre, however, is the ability to tap into self-service, automation and system integrations. These technical advances improve overall efficiency by reducing or altogether eliminating the historically transactional contacts that require agent assistance. Additionally, these same capabilities improve an agent’s access to real-time information and overall handling time when serving a customer. In other words, the actual work coming to contact centre agents is increasingly complex and even obscure.

Here’s what that means for you: You’re no longer leading an entry-level job that’s based on transactional workloads. Your contact centre (and the customer) needs employees who are experts at navigating messy situations that aren’t easily predicted or automated. Delivering on the value of efficiency for you means having contact centre agents who are well resourced, professional problem solvers and effectively empowered to make decisions at the moment.



## Level Two: Customer Satisfaction & Loyalty



As it turns out, my research discovered another contributing factor that was and continues to undermine the contact centre's ability to drive customer satisfaction and loyalty: tools and technologies. [My study](#) found **92% of contact centre leaders citing ineffective systems as the top thing that held contact centre employees back** from effectively helping their customers. [Another study](#) by IDC quantifies this further, noting that agents are spending up to 2.5 hours per day searching for what they need. Ouch.

In the last two decades, the connection between the contact centre and customer satisfaction and loyalty was increasingly researched, tested, evangelised and standardised. In principle, business leaders agree that delivering a great customer experience is a business priority and a path to sustainable growth and brand longevity. That's much easier said than done, but why? If you ask Jeff Toister, he'll tell you that it hinges on a business's ability to honor and guarantee the implied contract they have with their customers to do what is expected. Jeff is a keynote speaker whose expertise in customer experience can be found in his many LinkedIn Learning courses, [published content on the topic](#) and his frequent industry event presentations. His lesson for contact centre leaders is this: To deliver customer satisfaction and loyalty, you need better connections between the people who are making promises and those who are responsible for keeping them.

If Jeff is right, then it means that contact centre employees can decrease customer satisfaction and loyalty by making bad promises or failing to keep the promises made by others. Is there a common reason why that's happening? It's been said that when people don't do something it's often for one of three reasons.

1. They don't know how to do it.
2. They know how to do it, but don't know why it matters.
3. They know how, they know why, but they just don't care.

As a long-time trainer, researcher and contact centre advisor I sought to understand which, if any of these three, were the predominant factor in why contact centre agents failed to satisfy their customers.

### Was it a problem with training? Context? Attitude? All the above?

Knowing this provides an incredible advantage for businesses willing and able to correct the problem. You'll perpetually struggle to find and retain contact centre staff if the top frustrating factor in performing their job is systems that hold them back. That doesn't mean that great systems alone will enable you to hold on to staff – the expectations of them knowing how to do their job, understanding why it matters and drives impact and having the right cultural and dispositional fit for the job, are table stakes. Tools and technology are the differentiators in your employees feeling confident, capable and supported in fulfilling their purpose.



# 3

## Level Three: Strategic Value

Up to this point, we've discussed the two most common ways in which business leaders think about the role of the contact centre: efficiency and customer affinity. You'll struggle to find a contact centre that isn't focused on one or both initiatives. But, as Brad Cleveland points out, there's a third contribution that's cross-functional and paramount to a business's ability to understand, adapt and evolve its total customer experience. The contact centre is a primary hub of business communication and within the hundreds, thousands or millions of contacts that happen every year, exists rich data that could inform decisions that happen across the organisation. Delivering strategic value is all about the contact centre's ability to deploy systems and processes that enable them to identify, share and act on customer insights as they become available.

Contact centres that deliver strategic value consistently have employees who can take what they're learning right now to help the business determine what's next. More importantly, they're supported by processes that make it easy for these insights to travel throughout the organisation and provide transparency to if, when and how they're informing and driving change.

When employees are encouraged and enabled to contribute to the business at a strategic level, it bolsters their confidence in the impact they're having, expands their view on growth opportunities within the organisation and conditions them to think beyond their current challenges. You'll find these employees to experience higher levels of engagement in their work and demonstrate a proactive approach to understanding and serving their customers.

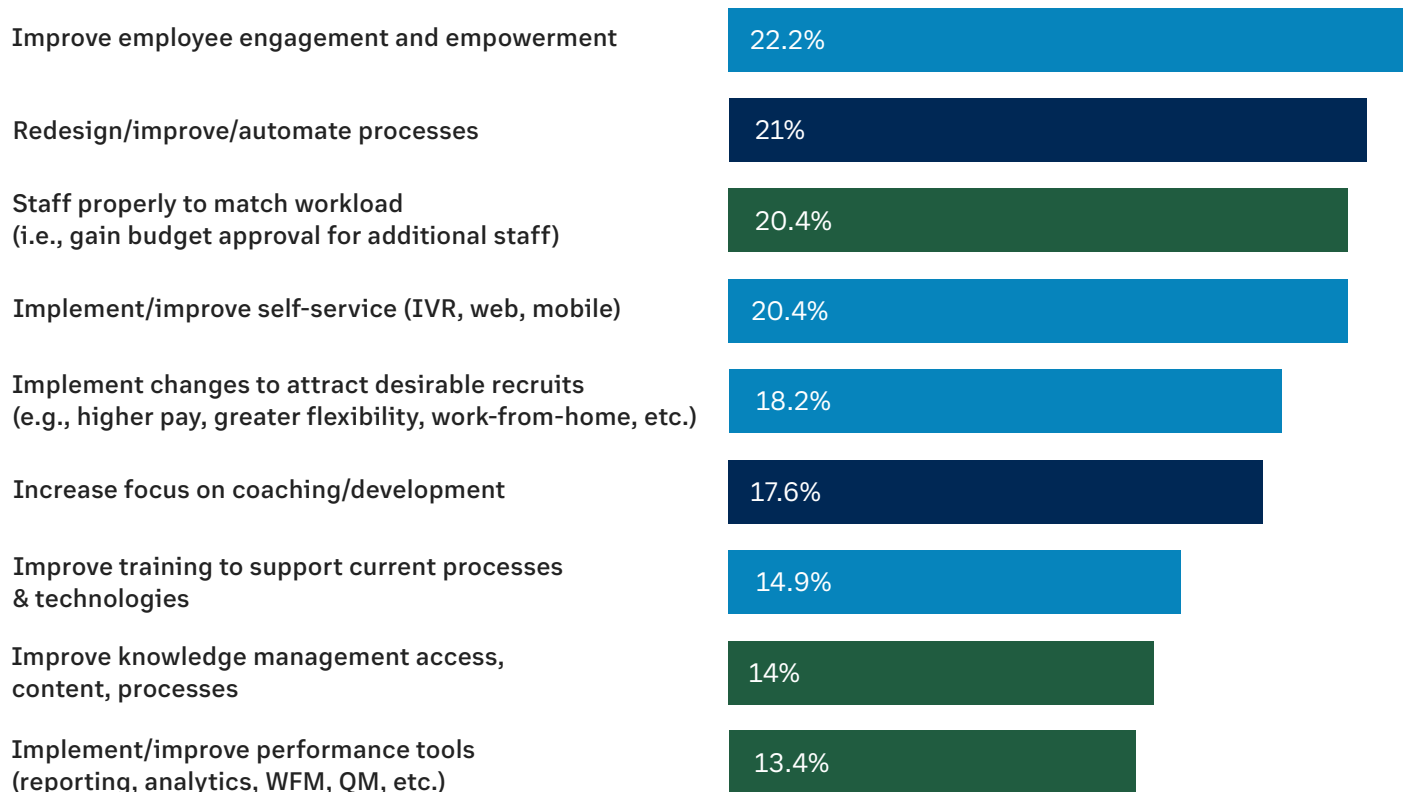


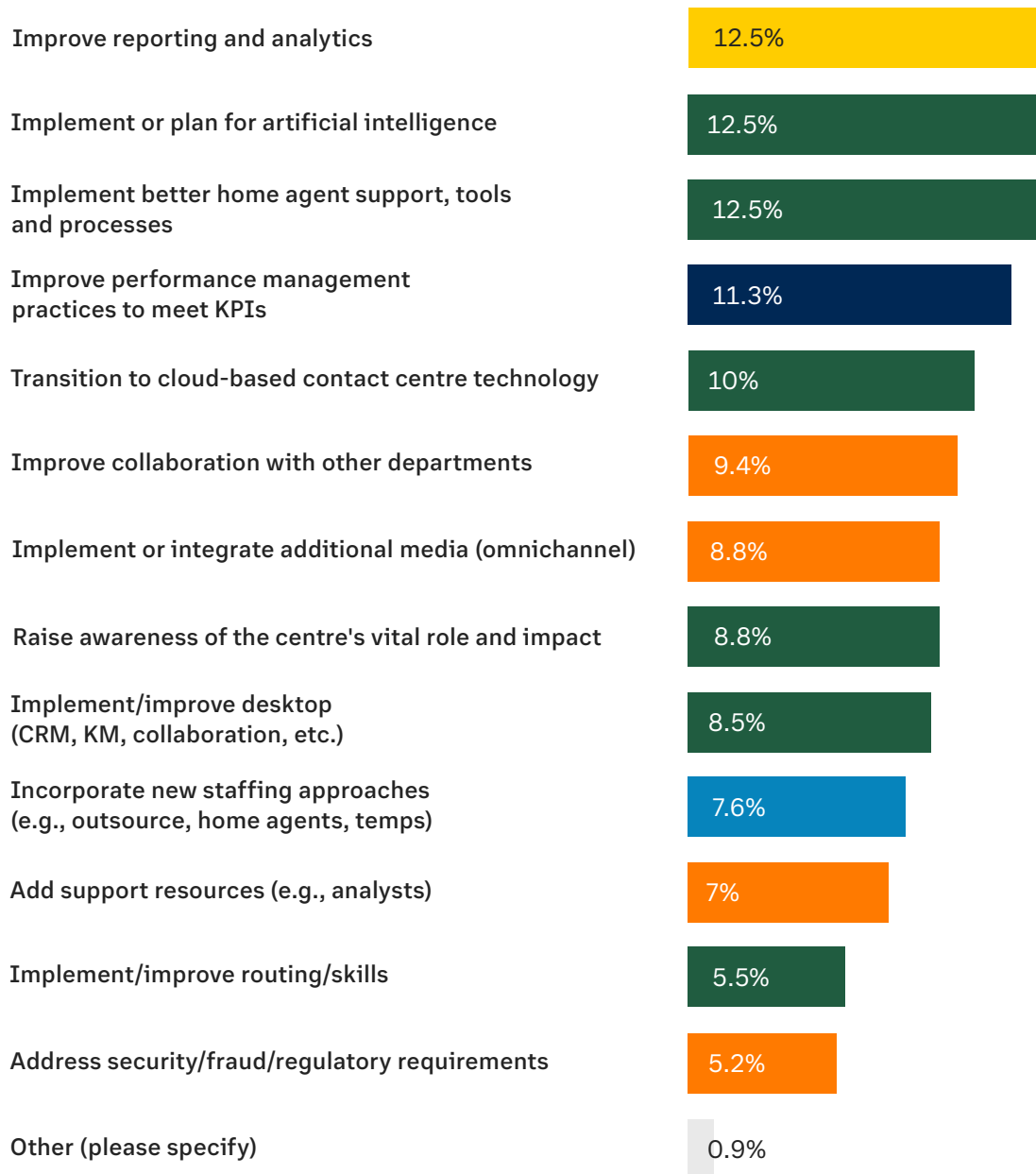
# A Process to Empower

Looking back at the 2022 Contact Centre Pipeline report reveals that agent empowerment and process improvement are already top of mind for contact centre leaders. We believe the two are deeply intertwined.

### What are your top priorities to work on in 2022?

● Technology ● Frontline Staff ● Workload and Performance ● Strategic ● Combination





The agent-centric leader is improving and automating processes to empower employees and drive higher engagement through more meaningful work. This approach yields exponential returns as it inevitably contributes to reduced costs through thoughtful uses of self-service, elevates customer satisfaction and loyalty thanks to better-equipped agents and accelerates strategic insights because of more integrated and collaborative systems. Let's further explore how an agent-centric approach to process improvement can drive each of those three outcomes.

## Processes That Drive Self-Service



One of the greatest evolutions of the modern customer and therefore the modern contact centre, is the dependence on and expectation of digital customer service offerings. From websites and mobile apps to messaging services and videos, most experiences that customers have with our businesses are digital. In the context of the contact centre, many of these digital interactions are delivered by self-service or automated interactions. It makes sense for all the right reasons. Self-service and automation, when done right, are shown to reduce costs, contribute to customer satisfaction and drive a more consistent customer experience.

But are those processes working as intended? What's been the impact on the contact centre agent? In many cases, it's left agents woefully unprepared to handle the new mix of complex work. In other instances, the technologies designed to make things easier for customers [failed to meet expectations](#).

Neither of those outcomes is ideal and the agent-centric leader knows it. They take two important steps when they deploy processes that are intended to automate predictable and repetitive experiences.

1

### Thoughtfully design and continuously evaluate the effectiveness of self-service.

Automation fails to meet expectations when it doesn't accurately predict and serve the customer's needs. This results in repeat contacts, escalations or even customer abandonment and, for the agent, frustration, stress and anxiety. Agent-centric leaders use a [customer access strategy](#) to ensure that they've considered their many variables and can adapt their plan over time.

2

### Engage agents in the evaluation, planning and evolution of their role as new automation deploy throughout the customer experience.

Matt Dixon, the author of *The Effortless Experience*, researched what it takes to be the optimal customer service agent during his tenure at the Corporate Executive Board. He did so with a keen eye to how the increased prevalence of processes [that automate has transformed](#) the day-to-day of the contact centre agent. The ideal agent type that they discovered was dubbed "The Controller". These agents thrive when they're able to be active contributors to the business.

This study found that controllers "value being allowed to solve problems in a way that doesn't require strict adherence to a rigid protocol". They also prize the freedom "to bring up problems with policies and procedures", they want to be part of organisations that are "serious about continual improvement and willing to give reps a voice in that process."

Matt and the CEB team even developed [this guide](#) to help contact centre leaders better identify and develop controllers within their teams.

## Processes That Elevate the Agent's Impact

Automating work presents the opportunity to introduce processes that enable contact centre agents to deliver elevated levels of care. These are the types of processes that are built to empower agents with context and insights that can inform decisions and guide them towards how they can best serve the customer. The agent-centric leader is all about processes designed to elevate the impact of the agent, not suppress it.

The solutions needed to design these types of processes are readily available and increasingly intuitive through the latest innovations in artificial intelligence and machine learning. Agent-centric leaders understand that the important element here is to consider how these technologies can be used to assist agents, not replace them.

Examples include AI that recommends solutions to an agent based on the customer journey up to that point or triggering knowledge articles for the agent to reference that is based on words or phrases used by the customer during the conversation.

The intent here is to alleviate the all-too-common hunt for information that agents must endure when they encounter unique or complex customer situations. Processes designed with this in mind will have a direct impact [on the two most important aspects of a customer service experience](#): working with knowledgeable agents and getting the issue resolved in a single interaction.

## Processes That Accelerate Innovation

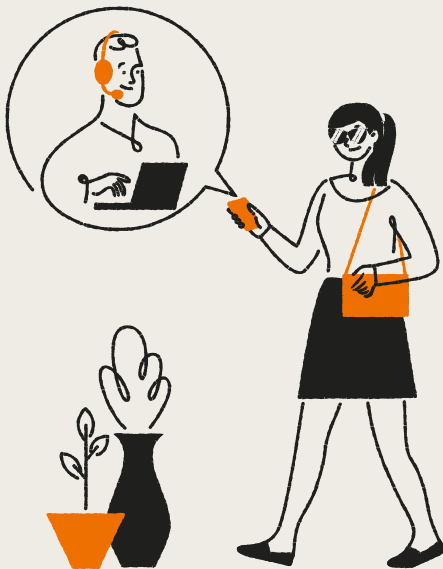
When we hear the word “innovation”, many of us might think about significant ideas that transformed or even birthed industries. Ideas whose founders we know by name and who are widely considered trailblazers. It's the type of innovation that we all get excited about and may even desire to achieve one day. But the problem with that type of innovation is that it doesn't happen often and the realities of contact centre work can make those “new frontier” initiatives feel out of reach. It doesn't mean that we should lose heart and it certainly doesn't mean that our contact centres can't be drivers of innovation. Quite the opposite is true and two other types of innovation are well understood by the agent-centric leader.

## Incremental Innovation

According to Northeastern University, “incremental innovation” refers to a series of small improvements made to a company's existing products or services. Think of these as no or low-cost ideas that build on current offerings in a way that provides further differentiation from the competition.

The contact centre is a great place to collect and develop suggestions for incremental innovation. These recommendations can often be pursued with lower risk to the business and maybe easy to implement, test and iterate. Top brands do this all the time because they have a clear process that accelerates their ability to discover and share ideas for incremental innovation.

Here's an example of how one business encourages its contact centre agents to share potential incremental innovations through a Voice of the Agent Programme.



### **What's The Purpose of Our Voice of the Agent Programme?**

- Reveal currently unknown opportunities to better serve and advise our customers.
- Validate our current beliefs, practices and plans for serving customers.
- Uncover new ideas for us to improve or innovate on our current offerings.

### **What Information Should You Listen for And Share?**

- Customers mention the impact of external factors on them/their perception of and relationship with the organisation. (The economy, recent news, personal life choices, etc.)
- Customers mention the impact of internal factors on them/their perception of and relationship with the organisation. (Hours of operation, cost of services, product quality)
- Customers mentioning products or services that they wished we would provide, enhance and/or stop providing.
- Any other comments, observations or ideas that arise out of your interactions with our customers.

### **How We'll Use the Information You Provide Us:**

- Measure and evaluate trends on an ongoing basis to help inform future business decisions.
- Share insights across the organisation, particularly the marketing department and executive team, to ensure that decisions consider your customer insights.
- Report back to all of you with how this information is being used across the organisation.

## What should your VOA emails look like?

To:

Contact Centre Director/Agent Supervisor/Etc.

Subject:

VOA 08/15/22

Body:

Today I received 31 calls from customers wishing that our cancellation policy was longer than 14 days. When I asked them what they would like to see as a cancellation policy, all of them said, “at least 30 days.”

Your feedback may only be a few sentences on some days or a few paragraphs on some others. The important part is that you’re providing this type of feedback daily. We encourage you to start a draft email at the beginning of each day and add comments and ideas as they come to you. The more details that you’re able to provide regarding a particular customer’s comments, the better, so be sure to ask probing questions when the opportunity presents itself.

If you’re ever not sure if something belongs in your VOA email, don’t hesitate to ask your supervisor or any member of our leadership team. We’re all here to help you and want to be sure that you feel fully equipped to do your job. Thank you in advance for all your help!

## Adjacent Innovation

When it comes to process improvement, the agent-centric leader sees only the potential to further empower and engage their employees. Whether it’s through eliminating repetitive work, enhancing their effectiveness in complex situations or encouraging them to share their insights and ideas, the implementation of these processes and a critical component of rejuvenating our agent’s view on work.

Adjacent innovation involves entering a new market and connecting with a new audience by tapping into something the company already does well. In this case, the contact centre may be identifying, supporting or even piloting the new idea.

For example, a company that plans to provide customer support through a new channel or language will look to the contact centre to lead the way. In these cases, it’s important to be clear on the reasoning behind the innovation and, even more importantly, how the business will define and measure its success.

Adjacent innovation comes from a well-intended place but, without an agent-centric view and a clear plan, could cause unnecessary harm and disruption. Offering new channels, languages or contact types has cascading implications on staffing, training, forecasting, enabling, evaluating and more. Without a clear strategy that considers these variables, the innovation could be deemed a failure before it ever had a fair chance at success.

# Technology Brought Together

Throughout this guide I've occasionally referenced the role of tools and technology because the truth is in today's complex, digital and always-on world, businesses can't get ahead or for let alone keep up with, customer expectations without it. But there's a major problem for most contact centres that we haven't touched on yet. It's one that if we don't resolve will erode our ability to be agent-centric, limit our success with customers and perpetuate the problems that prevent our businesses from achieving maximum profitability.

The major problem is this: Most contact centres have siloed solutions that create blind spots, add unnecessary complexity to already complicated work and drastically limit the businesses' ability to collect and act on data in a meaningful way. This is what 92% of contact centre leaders were talking about when they told me that they had ineffective systems.

If this is the reality for most contact centres, what's the agent-centric approach to moving ahead? The team at RingCentral believes it's centred around five key technical capabilities.

### 1. Go Digital First

Expand your self-service capabilities in ways that eliminate the transactional, repetitive tasks from the agent's workload and improve the customer's ease of doing business. You'll quickly learn that when done right you'll see reductions to your cost per contact on those self-service interactions and improvements to your customer satisfaction rates for those same contacts.



## 2. Create One Environment for All Communication

The biggest contributor to the current siloed technology stacks in most contact centres was a lack of tools that were built to be future-proof. They were on-premises or limited-use cloud solutions that fell short of business needs long before their technical debt was recuperated. By consolidating to a single, integrated environment you'll gain one place to monitor all channels, eliminate the learning curve required for multiple tools and have access to a single source of truth for contact history.

## 3. Use AI to Assist Agents

While there are some great use cases for AI to assist customers, we believe that it's an even better assistant for contact centre agents. When embedded into the same system that both the customer and agent are using, it's armed with a robust data set to power accurate recommendations and guidance. This enables agents to have pertinent conversations with customers while reducing the time and effort of conducting research themselves.



## 4. Provide a 360° View of Customers

One of the primary challenges of siloed technology is the inability of systems to share information consistently and completely. An agent-centric approach to technology selection considers the ability to integrate the CRM and other backend systems in such a way that it seamlessly delivers the latest customer information such as previous orders, open support cases and preferences directly to the agent.

These capabilities align with the core tenants of what I believe are key to seeing contact centres win in 2022 and beyond. Additionally, they're centred around an approach that makes the agents' work easier – which ultimately makes the customers' lives better.

## 5. Tap into Automation to Break Boredom

Agent-centric technologies recognise that automation isn't just for improving the customer's self-service experience, it's for eliminating mundane work. Highly repetitive and predictable tasks in the agent's every day, like copying data across systems or clicking through a standard workflow, can become automation that kicks in at just the right time.

# Being an Agent-Centric Leader

People want to take part in work where they believe they can make a difference, they know their contributions are valued and they feel equipped and supported to take on whatever comes their way.

Sadly, that's hard to find in many lines of work. It's especially difficult in the contact centre.

A legacy mindset, a limited perception of value, a laggard approach to tools and resources. It's no wonder that contact centres struggle with high turnover and low employee engagement – great resignation or not.

It's time for a renaissance in the contact centre and a revitalisation of the agent's role. It's time to view our people in a whole new way, to implement processes built to empower and deploy technologies that bring the inevitable chaos of customer contacts into order through a unified environment.

You can take your next step to becoming an agent-centric leader one of three ways.



### 1. Tap into your people's potential

One of the easiest ways to get started is by simply inviting your employees into a conversation. During their next one on one, consider asking them one or all of these questions.

- What's something that our contact centre should start doing?
- What's something that our contact centre should stop doing?
- What's something that our contact centre should keep doing?
- What's the number one thing that prevents you from providing a great customer experience?
- What can I do this week to help you be more successful in your job?

## 2. Empower them to do their best work

If you already know the barriers to empower agents in your contact centre, then now is your time to act. Yes, your employees want to know that you understand their frustration, but more importantly, they want to know that you're actively working to resolve it for them. Partner with your agents on a plan and processes that address their challenges and frees them up to do meaningful work with impact.

## 3. Deploy solutions that genuinely help them

Perhaps you understand your barriers and have worked on enabling processes, but realise that it's your tools and technologies that are holding you back from being agent centric. You'd be far from alone. Transforming technology can be a daunting, complicated and confusing task for even the most experienced of business leaders. You don't have to go at it alone. The team at RingCentral is expert at these types of discussions – they have them every day – and they're here to help you explore your path to running an agent-centric contact centre. Contact them today at [ringcentral.co.uk/effortless-customer-engagement](https://ringcentral.co.uk/effortless-customer-engagement) to start the conversation.

## About Justin Robbins & Metric Sherpa

Justin Robbins is a researcher, educator and advisor who's spent the past two decades helping businesses define and deliver exceptional customer experiences.

He's developed industry training and certification programs, authored numerous research reports and how-to guides, led strategic consulting engagements and contributed his insights to mainstream media outlets around the globe – all focused on helping organisations achieve better business outcomes from their customer experience initiatives.

He founded Metric Sherpa, Inc in 2017 to apply what he'd learned as a customer experience leader to helping guide other businesses to CX success. At Metric Sherpa, their focus is helping customer experience leaders make the most of their quality assurance, coaching and development and performance measurement programs.

# About RingCentral

RingCentral, Inc. (NYSE: RNG) is a leading provider of business cloud communications and contact centre solutions based on its Message Video Phone™ (MVP™) global platform. More flexible and cost effective than the on-premises PBX and video conferencing systems it replaces, RingCentral helps employees communicate across devices from wherever they are. RingCentral offers three key products. RingCentral MVP™ combines team messaging, video meetings, internet phone and other functionalities in a single interface. RingCentral Video™, along with its team messaging feature, enables Smart Video Meetings™. RingCentral Contact Centre™ gives companies the tools they need to connect with customers across channels. These are available on an open platform that integrates with hundreds of third-party apps and makes it simple to customise workflows. RingCentral is headquartered in Belmont, California, USA, and has offices around the world.

For more information, please contact a sales representative.  
Visit [ringcentral.co.uk](https://ringcentral.co.uk) or call 0800 098 8136.