



Delivering Superior Experiences: How Positive Agent Experience Amplifies Customer Experience

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Introduction

2020 shifted the paradigm of how we work. In the aftermath of COVID-19, businesses have had to reimagine every aspect of operations, including how and where work gets done. Employees are learning to work from anywhere on any device, and companies are figuring out how to keep their people productive while ensuring safety and resiliency in a challenging environment. Even as the pandemic eventually moves into its next phase, it will not be business as usual, and companies must find new and lasting ways to support employees in this new world.

Over a year into the crisis, organizations are re-evaluating their customer experience (CX) strategies for the long term. They are focusing on leveraging superior CX as a differentiator and an engine for growth as they transition to a post-pandemic world. Organizations are also recognizing that, along with the customer, the agent is a pivotal component of CX. Agent experience (AX) is the sum of all interactions an agent has with his/her organization and can significantly impact business performance. Organizations now have an opportunity to reinvent their agent experience in a way that drives engagement, productivity, and satisfaction. In this new work-from-anywhere environment, where a large portion of the workforce may never completely return to the office, leaders must be thoughtful about agent experience, as there is an obvious link between customer satisfaction and agent engagement and productivity. As companies strive for growth and profitability, prioritizing a better agent experience is fundamental.

By easing key agent pain points, eliminating skill gaps, and providing agents the tools they need to succeed, organizations can ensure consistent, engaging customer experiences that drive positive business outcomes and brand image. This process starts with a mindset shift that puts agents at the center and involves thoughtfully deploying technology and restructuring business processes to prioritize agents' physical and mental well-being.

In this viewpoint, we address the following questions related to agent experience:

- What is agent experience, and how does it impact customer experience and the broader business?
- What workplace challenges do agents face, and what are the key drivers for AX and engagement?
- What measures should companies take to improve AX?

Reimagining agent experience and workplace challenges

Everest Group take

Agent experience has a direct and profound impact on customer experience. When companies achieve good agent experience and engagement, they improve talent, customer, and business outcomes.

Why improving agent experience leads to better outcomes

The parallels between a superior customer experience and agent experience are striking. A satisfying agent experience not only drives better CX outcomes such as loyalty, ROI, and additional sales, but it also helps with talent recruitment and increases engagement, productivity, and retention.

Correspondingly, positive agent experience improves firms' financial performance. Brands looking to improve their CX and business outcomes should prioritize creating the best agent experience possible.

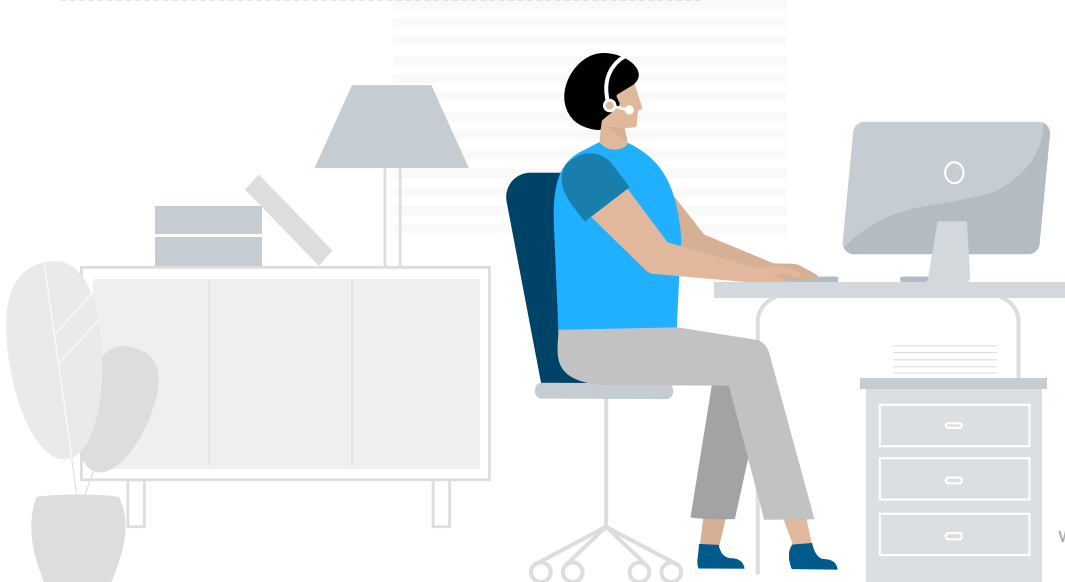
Today's customer service agents want jobs that fit their lifestyles, give them opportunities to grow, and connect them to greater meaning and purpose. Focusing on agent experience can increase a business' competitive advantage, sustain and fuel its growth, increase employee satisfaction, help to attract and recruit top talent, and positively impact employee retention.

EXHIBIT 1

Positive outcomes from focusing on agent experience

Source: Everest Group (2021)

Business impact	Talent impact
Enhanced brand image	Higher agent retention
Higher profitability	Enhanced work performance
Higher CSAT, NPS, CES	Increased productivity
Increased engagement	Greater discretionary effort



Challenges and complexities customer service agents face

Despite the growing importance of agent experience, much work remains to address the challenges agents face in their work activities, as well as their overall work lives. In today’s service environment, customers can typically solve simple problems through self-service options. When they seek help from a CX agent, it is invariably to resolve more difficult issues. Despite the growing complexity of contact center interactions – as well as heightened customer expectations – agents often lack the tools and support they need to succeed.

The current approach of training, coaching, and enabling agents before and after live customer interactions is insufficient in providing real-time support to agents when they need it. As a result, agents juggle many challenges simultaneously, such as working with multiple disparate systems and trying to manage manual tasks, all of which impact their experience and productivity.

Agents are also struggling with broader workplace issues such as unmanageable workloads, lack of job autonomy and flexibility, unsupportive work environments, inadequate manager-agent communication, and overall poor work-life balance and wellbeing. Again, these challenges translate into poor AX and disengagement, leading to sub-par customer experience, high turnover, and lost productivity, all of which have a significant impact on the company’s brand, finances, and CX.

EXHIBIT 2

Major challenges and areas of dissatisfaction agents face at work

Source: Everest Group (2021)



Operational and customer service delivery issues	Broader professional and work-life issues
Lack of enabling infrastructure, tools, and technology to enable good customer service	Limited opportunities for growth and career progression
Lack of real-time access to relevant CX data and periodically updated guided workflows, scripts, and knowledge bases	Stringent workflows with no autonomy to make decisions, impacting agent KPIs and appraisals
The need to work with multiple disparate systems requiring manually-intensive tasks	Underutilization of agent skills and lack of fit between the job and agent profile
Inadequate coaching and training to improve job performance	Feeling underappreciated and unrecognized for work performed
Unclear communication and lack of direction and feedback from managers	Dissatisfaction with compensation and work-life balance

Companies should apply a more holistic and effective approach to agent experience, implementing tools that motivate, recognize, and engage employees to create a highly effective and knowledgeable workforce invested in their organizations' success. Improving agent experience by addressing these challenges could reduce churn and result in more highly skilled agents, which, by extension, improves customer experience.

Agent experience and key strategic areas of engagement

Everest Group take

Agents' physical, socio-cultural, and technological environments come together to form an overall experience that shapes their opinions of their jobs and organizations. This experience influences their satisfaction, productivity, and performance, which – in turn – impacts customer experience. Other crucial factors such as leadership and management quality, supportive peers, nature and volume of work, learning and development, and transparent feedback act as key enablers in elevating agents' emotional quotient, helping them succeed at work and align with organizational goals.

The agent experience environment

When considered holistically, AX is the sum of everything agents encounter in their professional surroundings while they do their jobs. It is a bottom-up, employee-centric approach, the goal of which is to understand the overall and day-to-day experiences agents have so that processes, engagement strategies, and overall interactions can be improved. AX reflects agents' self-reported satisfaction with their work, and is created by interactions across their physical environments, supervisors, peers, nature and volume of work tasks, training, and more. In simpler terms, a good AX leads to better engagement, work effectiveness, satisfaction, and overall agent wellbeing. Agent experience exists at the intersection of the socio-cultural, technological, and physical environments in the workplace as shown in exhibit below. A great agent experience ensures that these factors are in sync with each other.

EXHIBIT 3

Three major environments encompassing agent experience

Source: Everest Group (2021)



The following key enablers elevate agents' emotional quotient, helping them succeed at work and align with organization goals.

Physical environment and workplace design

Everyday agent experience is significantly influenced by the physical workspace. It is imperative that organizations optimize their physical work arrangements to help lift agent engagement and productivity. No matter if the workspace is in an office or at home, agents should have access to flexible work arrangements and technologies to enable maximum productivity while exercising autonomy.

- Give agents choice and control over when and how to work: Research shows that agents who have more autonomy over their work experience and the ability to choose where they want to work based on the task at hand have a much more positive workplace experience. This autonomy provides flexibility to address their need for privacy, concentration, and team collaboration without disruptions
- Provide spaces for social and informal connections: Agents should have access to a variety of spaces including places that allow personal focus, recreation, and informal meetings. These spaces, either physical or virtual, enable interactions, allow sharing of ideas, and promote a culture of creativity

Socio-cultural environment

Corporate culture is one of the top-ranking parameters that impacts work experience. Relationships at the workplace can influence individual effectiveness and overall organizational perceptions. A positive socio-cultural environment energizes, motivates, and empowers agents to great performance. Leadership style, sense of purpose, organizational structure, and the people who make up the organization are all part of the corporate culture.

In addition, socio-cultural environments are impacted by social cohesion and inclusion, compensation and performance evaluation, feedback management, skill mapping, learning and development, and work-life balance. AX-centric organizations are moving beyond a highly structured, one-size-fits-all approach to a more tailored approach based on agents' unique requirements. Examples include offering agents development courses on financial planning, meditation, or other well-being activities.

Digital environment and supporting tools and technology

The organization's technological environment relates to the tools agents use to do their jobs, including everything from the internal social network to approved mobile devices to the equipment and video conferencing solutions that agents have access to. The technology ecosystem also includes digital platforms, systems (both hardware and software), and tools that provide access to performance data, customer history/context, flexible scheduling, mobile applications, and e-learning.

As the central nervous system of the organization, technology can enable agents to meet changing customer needs and preferences and deliver stellar customer service. It forms an overall experience, shaping agents' views on their jobs and organizations, influencing satisfaction, productivity, and performance, in turn impacting customer service.

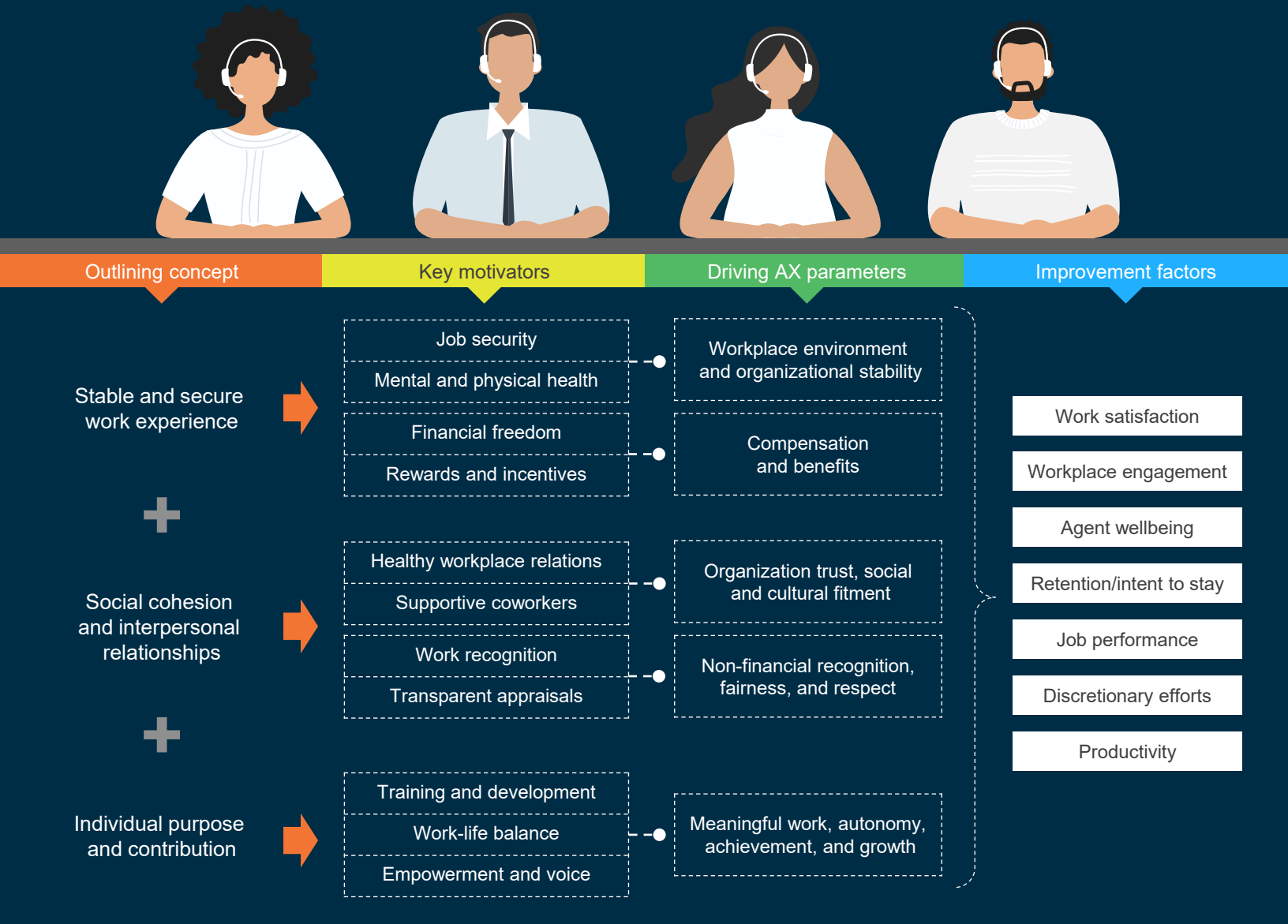
AX factors that drive engagement, work effectiveness, and well-being

There is a strong correlation between agents' stated needs and the underlying drivers of agent work satisfaction, engagement, effectiveness, and well-being. Organizations should seek to address their workforces' most fundamental needs, taking into consideration their unique requirements and expectations. Exhibit 4 shows key job motivators and outcomes grouped by core agent experience themes.

EXHIBIT 4

Framework: drivers and outcomes of agent experience at work

Source: Everest Group (2021)



Organizational stability, trust in leadership, and support from managers also play a crucial role in agent experience. Leadership and management set a company’s direction and overall tone, thereby creating a foundation for a positive (or negative) agent experience. Positive experience begins with a high level of clarity around future direction and why employees matter in successfully moving the organization forward.

Ultimately, a positive agent experience translates into improved agent outcomes. Agents with more positive experiences at work are significantly more likely to report higher levels of discretionary effort, and consistently perform above expectations. They are also less likely to be absent or quit. Positive agent experience can contribute to higher motivation to apply extra effort at work and go above and beyond typical job responsibilities.

Digital agent experience – the right tools, platforms, and environment for enhanced AX and productivity

Everest Group take

To effectively meet customer needs, agents must be set up for success. Agent experience also encompasses the way agents interact with customers. To improve AX, companies need to invest in the right digital solutions to ensure that their workforces are capable of delivering next-generation customer experience. Tools and technologies that help eliminate transactional or manually intensive activities are a crucial part of overall agent experience as they improve productivity and allow agents to focus on more judgment-intensive and complex activities.

Gamification, skills assessments, enhanced coaching and training options, and the use of Knowledge Management (KM) applications can lead to a more highly skilled and motivated workforce. Digital capabilities such as agent assist solutions, analytics and insights, and automation also can greatly improve agent engagement, growth, and learning, which are crucial elements to overall agent experience.

By moving mundane processes like data entry and basic search to automated systems and leveraging new technology like Artificial Intelligence (AI) and bots to facilitate personalized CX, agents can focus on higher-level, more interesting tasks that boost morale and reduce churn. Tools and digital solutions also lessen agent fatigue, which helps reduce costly errors and expedite service delivery. All of this leads to better performance including increased customer satisfaction (CSAT).

EXHIBIT 5

Digital capabilities affecting AX and their impact on key factors driving CSAT

Source: Everest Group (2021)

Digital assets for AX	Key parameters impacting CSAT					
	Subject matter expertise	Personalization of responses	Effectiveness of resolution	Time duration for resolution	Escalations	Responsiveness
Unified agent desktop				✓		✓
Internal self-service	✓	✓	✓	✓	✓	✓
Skills-based routing	✓	✓	✓	✓	✓	✓
Intraday task management				✓		✓
Gamification	✓		✓		✓	
Automation of manual tasks				✓		✓
Access to real-time support		✓		✓		✓
AI-based agent assist solutions	✓	✓	✓	✓	✓	✓
UX/UI design				✓		✓

- **Unified agent desktop:** Agents often use multiple systems with several screens open at once, which can result in constant rekeying of the same information into several systems. Unified agent desktops can help agents concentrate on the customer by bringing data into a single view, enabling them to have control over any conversation and increasing agent productivity by streamlining workflow. These unified desktop systems also can provide graphical and easy to recognize indicators of customer preferences and status (for instance, whether they have a complaint open) without needing to drill down
- **Internal self-service:** Self-service is not only for customers; it can also be leveraged for agents. Access to organized, easily available information makes it possible for agents to share relevant information with customers, reducing response times so they can move from one customer to the next. Along with internal knowledge bases that are constantly being evaluated and improved, agents can proactively contribute content and provide feedback. Additional self-service capabilities may include guided workflows and scripting, decision trees, and live portals/dashboards where agents can monitor their schedules, work, skills-based training applications, and more
- **Skills-based routing:** Skills-based routing systems direct calls based on agent department, skills, knowledge, language, geographic location, and other customized options. These tools streamline business processes, enhance agent effectiveness, reduce transfers, and increase first-contact resolution – all of which have an impact on agent experience and productivity
- **Intraday task management:** Intraday task management helps turn inactive hours into productive ones by filling idle time with meaningful training and assignments. It can automatically find suitable times in agents' work schedules for training and other off-phone work based on the volume of customer traffic. When call volumes dip, it prompts agents to work on such activities by creating a personalized and prioritized list of assignments based on employee performance or broader business requirements
- **Gamification:** Gamification can dramatically increase engagement by intrinsically motivating agents to change behavior and participate in team building and collaboration. It focuses employees on specific activities and behaviors that matter to customers. Instead of traditional classroom-style training, more companies are creating gamification quests and contests to engage agents in completing objectives and adding skills, as well as recognizing these achievements with digital badges and awards
- **Automation of manual tasks:** Automating manual or transactional procedures such as post-call documentation, account information queries, non-templated inquiry escalations, and appointment reservations frees agents to take care of more value-adding issues, significantly reducing errors and ensuring that information in business tools is up to date and in standardized formats
- **Access to real-time support:** Agents who have access to real-time information such as how many callers are in the queue, other agents' status, longest wait time in the queue, average abandonment time, and average hold time, can serve customers better and make more informed decisions. Providing agents access to customer history and accurate information about products/services in real time can help improve FCR. Real-time speech analytics can help monitor and improve conversations and evaluate call recordings. Feedback from these activities can guide agents through the kinds of language they should be using, improve the way they engage with customers, and resolve their inquiries more efficiently

- **AI-based agent assist solutions:** AI-powered assist tools provide intelligent guidance and insights to recommend real-time contextualized next best actions to the agent when working to resolve complex customer issues. These self-learning tools help understand customer intent, non-verbal cues, and tone through conversational AI and real-time speech analytics during live interactions. They can also be supported through intelligent virtual agents (IVAs) to resolve simple agent queries, provide requisite context on the customer journey, trigger robotic desktop automation (RDA), launch guided workflows to help with next steps, and surface relevant information from knowledge bases
- **UX/UI design:** User experience (UX) and user interface (UI) design is also crucial for AX as it facilitates agent access to data through easy to read and clutter-free dashboards and reporting tools that are simple and to the point. Traditional screens can be difficult to navigate, but a user-friendly layer that sits on top can lead to better AX as well as facilitate quicker resolution times. The interface design – its usability, ease of navigation, architecture, and visual hierarchy are also integral to an enjoyable agent experience

Importance of agent experience in a post-pandemic Work From Home (WFH) setting

Everest Group take

As organizations review their customer experience delivery strategies based on the vulnerabilities exposed by the global pandemic, the WFH model is sure to play a key role. Most organizations lack established WFH policies and practices that are on par with their brick-and-mortar centers. In addition, managing a remote workforce has its unique complexities and challenges. It is vital for organizations to keep agent experience front and center as they prepare for a post-pandemic new normal.

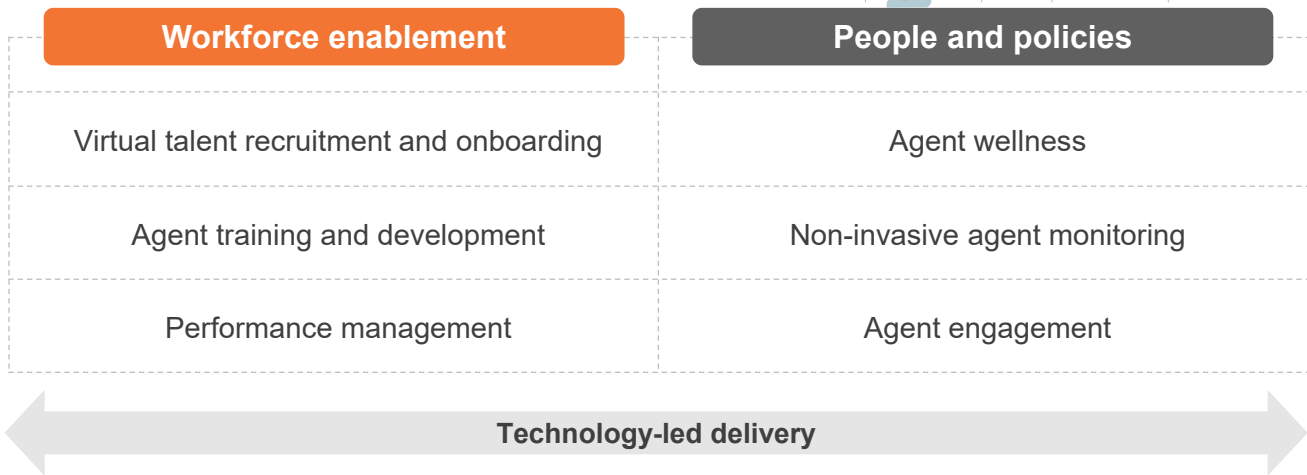
With changing post-pandemic workplace dynamics, people had to transition and get accustomed to a new work environment, processes, and channels of interpersonal communication and collaboration. Having a foundation of involvement, inclusion, transparency, and respect can help agents adapt to new ways of working and interacting. Building trust and recognition of agents' efforts is critical to agent experience, engagement, well-being, and effectiveness.

In a remote working environment such as a Work At Home Agent (WAHA) model or a hybrid working model, organizations cannot physically monitor most of the interactions that occur. While companies might notice when their agents feel frustrated or upset by a call taken on-site, they do not have the same visibility for agents working remotely. Hence, characteristics such as real-time visibility of customer and agent data, virtual workforce integration, workforce management flexibility, and technology robustness are even more crucial.

EXHIBIT 6

Key enablers impacting agent experience and CX in a WFH setting

Source: Everest Group (2021)



- Virtual talent recruitment and onboarding:** Effective virtual recruitment, onboarding, engagement, performance management, and training practices must be in place to minimize any disparity between brick and mortar and WAHA CXM agents’ experiences. Newly hired agents often struggle with new technologies and tools, and the onboarding process must ease agents’ ability to troubleshoot and ask for and receive help. Some evolved industry best practices for a smoother WAHA experience for new hires include self-help guides, one-click help desks, and allowing agents to choose to use their own devices
- Training and development:** Organizations should hire internally- or externally-certified workforce trainers. Because WAHA CXM agents usually come from diverse backgrounds and have different learning needs, a remote development program should entail virtualized training models that span multiple learning platforms to deliver interactive experiences covering different learning styles (audio, visual, or kinesthetic). Organizations can also develop on-the-job training that is module-based, self-paced, and interactive, and invest in accelerating learning outcomes using next-generation training techniques, such as L&D gamification, augmented reality, and simulations
- Performance management:** Performance management through incentives, defined career progression paths, and thorough ongoing feedback management are necessary components to improving work satisfaction and experience for WAHA CXM agents

- **Agent wellness:** Agent burnout is a real issue, especially in a remote environment. Agents can be encouraged to practice self-care by setting work schedules that mimic on-site shifts. Spending some time outside or away from the computer can limit mental fatigue and provide a reprieve from work especially after difficult customer interactions. Encourage agents to keep work and home life separate, even if they occur in the same place, which will keep employees more engaged and productive during work hours
- **Non-invasive agent monitoring:** As companies try to ensure customer and company data security privacy, it is equally important to ensure agent privacy. Agent activity recording during customer calls, software or AI-based cameras that do not retain images of minors in the background or other personal images are some ways to address agents' privacy concerns
- **Agent engagement:** Organizations should drive collaborative agent engagement initiatives so that agents feel comfortable and connected to their organizations and colleagues. Building high-touch collaboration and intra-company social media platforms oriented to at-home workers encourages community-based knowledge sharing in real time. Regular updates via briefings and town halls and cultural and team-bonding initiatives involving families are other ways that organizations can engage and motivate their WAHA workforces. Employee engagement initiatives such as competitions and leaderboards, encouraging social cohesion through regular team meetings, virtual rewards and recognition programs, and sessions on physical and mental well-being may further engage and motivate CX agents

These key enablers need to be supported by a strong technically advanced and robust infrastructure, the right productivity tools and digital solutions, and an end-to-end ecosystem for digital hiring, secure omnichannel training, and managing remote teams.

Conclusion

CX agents are crucial in contributing to their organizations' long-term sustainable growth and brand equity. By focusing on agent experience, organizations can increase competitive advantage and sustain and fuel growth. AX is about building organizational connections and relationships with agents such that they have ownership in shaping the organization for which they work. Companies that actively build superior agent experiences and organizational culture will always have an edge over their peers due to better agent engagement, productivity, and loyalty.



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