



REPORT

Supercharge Customer Experiences Through Great Agent Support

Understanding the customer
service agent experience and its
impact on customers

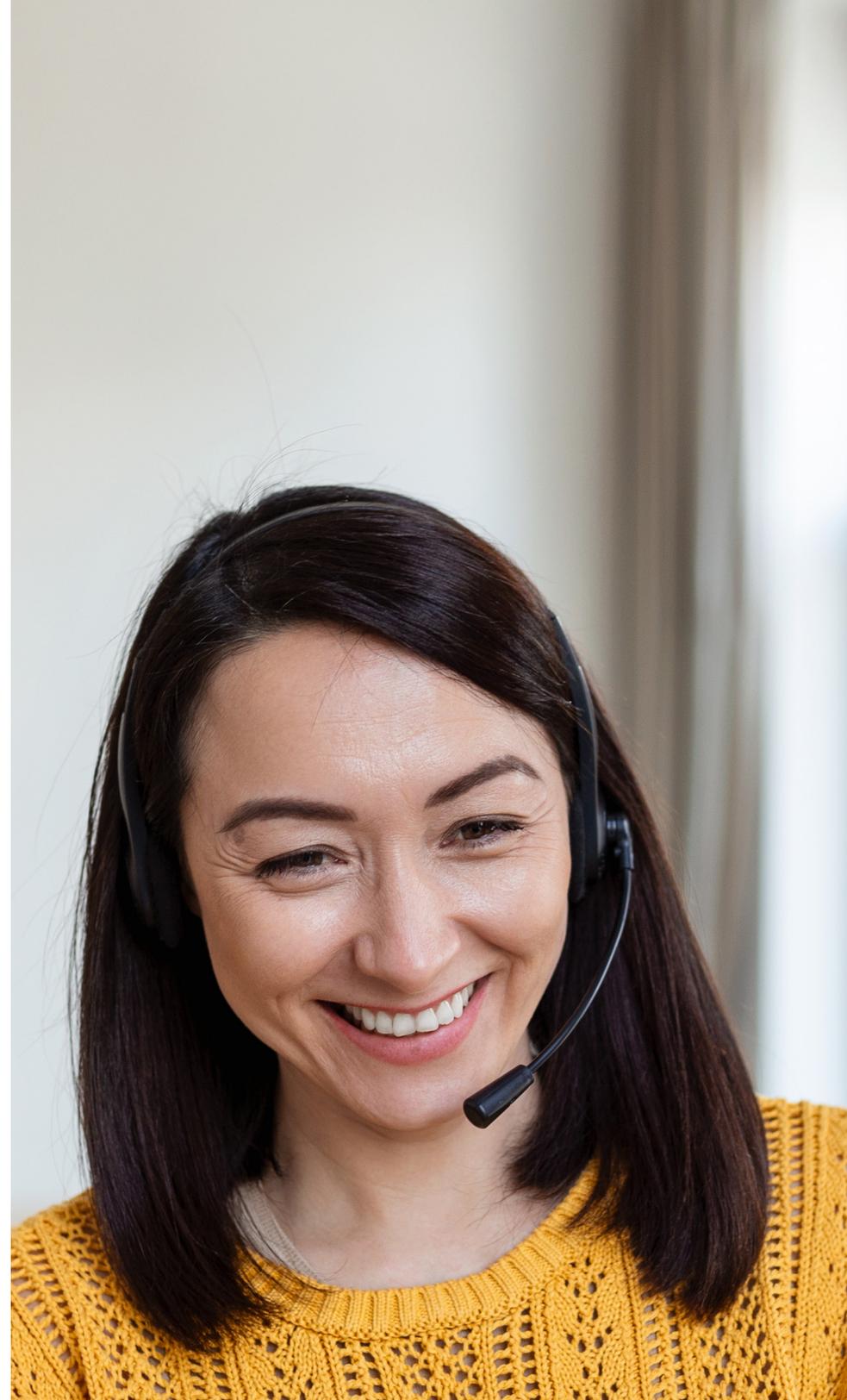
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Introduction

Creating great customer experiences starts in house, with the agents who support your customers each and every day. You can improve the customer experience by providing your customer service agents with the tools, programs and processes that allow them to do their best work. Agents shouldn't have to battle with unhelpful tools or spend extra time searching for answers to customers' questions. Similarly, customer service agents can't provide good customer service without organizational support, management feedback or time to reflect on their work. In essence, the continued improvement on in-house agent experiences is a cornerstone to making continued improvement on customer experience.

Given this need, how exactly are organizations delivering that support to their agents? What takeaways can beginner organizations gather from more advanced organizations further along in their own customer service agent experiences? To answer these questions and more, Webex by Cisco partnered with CMSWire to conduct the Improving Customer Service Agent Experiences survey. We asked managers, directors and senior leaders for insight into how organizations support their customer service agents, where they plan investments to improve the agent experience, and where gaps still exist. We discovered that leaders are generally supporting their agents through attention, budget, opportunities and time. Further, organizations with a more advanced customer service technology stack deliver great customer service by engaging through more channels, while at the same time supporting agents with frequent reviews, more budget and timely initiatives, all of which is designed to improve performance.



Demographics in Brief

The Improving Customer Service Agent Experiences survey received more than

600

responses from managers.

Key Findings

- ✓ Good customer experiences (CX) start with good agent experiences (AX).
- ✓ Organizations that invest and mature their CX technology stacks find agents more effective and see more positive outcomes.
- ✓ Organizations with more advanced technology stacks are seeing the most improvement to their workloads.
- ✓ Advanced CX technology organizations are more likely to invest in more technology to support agents and their mission for great CX.

Improving the Customer Experience is Critical to Business Success

The agent experience is a critical component of improving the customer experience. Nearly everyone is focused on how agents feel about their work; many organizations provide agent support through budget, training, coaching, reviews or self-assessment.

There's near-universal agreement that improving customer experience is mission-critical. Nearly all respondents agree: 96% say that improving the agent experience is critical for the organization's ability to deliver on its mission. Further, there's similar broad agreement that senior leadership understands the importance of good AX and its impact on CX. Ninety-one percent of respondents say that senior leaders at their organization understand the importance of improving the agent experience. Further 92% say their leadership understands the connection between AX and CX. It's no wonder then that 7 in 10 respondents say that improving CX is either a high or critical priority for the coming year.

With everyone apparently on the same page about improving AX how exactly are agents currently evaluated and supported? What can organizations do to provide more agent support in their quest to improve CX?

To best support agents, it's important to recognize where agents interact with customers. These days, customers can use a variety of channels to reach out for support. Phone calls, text messages, emails, social media and more are possible channels customers use to connect with businesses today. Although customers have all these channels available to them, their most common interactions are through email and voice — more than 8 in 10 respondents identify these two channels as the top places where agents interact with customers (Figure 1).

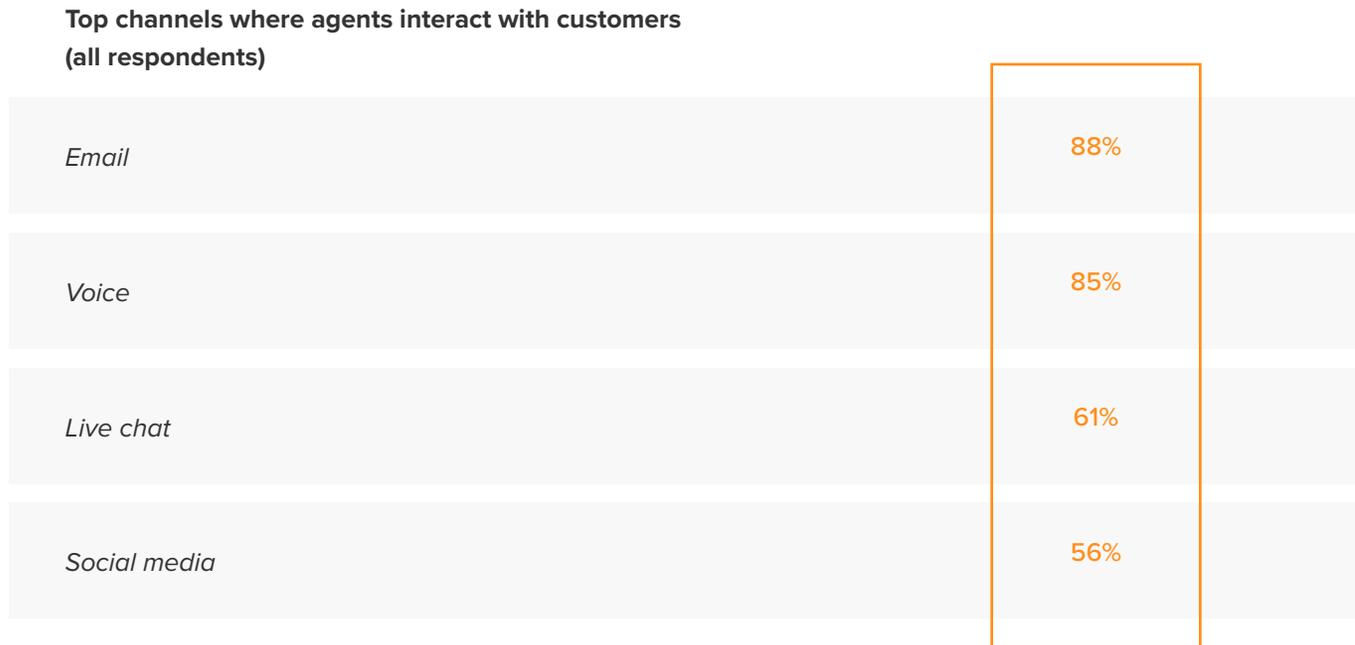


Figure 1

Agent Support and Opportunities To Improve

The connection between employee experience and customer experience is well established. [Research has shown](#) that when employees are happy, they're more engaged, which leads to better customer experiences and increased customer satisfaction. To that end, as the first line of customer service, agents' happiness and engagement levels need to be high enough to positively impact CX.

This means that the support and conditions of work you provide your agents is on the critical path to good customer experience. Our survey respondents support agents in numerous ways, from providing access to needed technology and information, learning and development opportunities, to making available toolkits and knowledge bases, offering mentoring and shadowing options and much more (Figure 2).

Supporting customer service agents in their interactions with customers (all respondents)

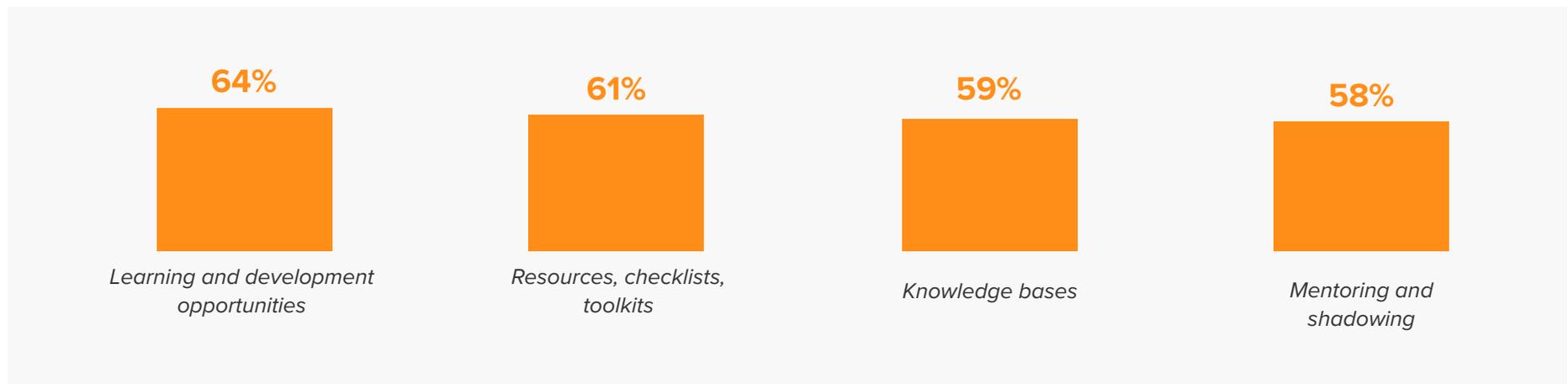


Figure 2

Assessment and evaluation are important components of any AX support program. Since they interact with customers daily, it makes sense that agents receive regular performance feedback as well as the opportunity to frequently self-assess. In fact, it's likely that customer service agents have more opportunities for self-assessment and performance review than employees in any other department. Most respondent organizations reported that their customer service agents have the chance to review their own performance at least weekly, if not more frequently (Figure 3).

How often customer service agents have the chance to review their own performance (all respondents)

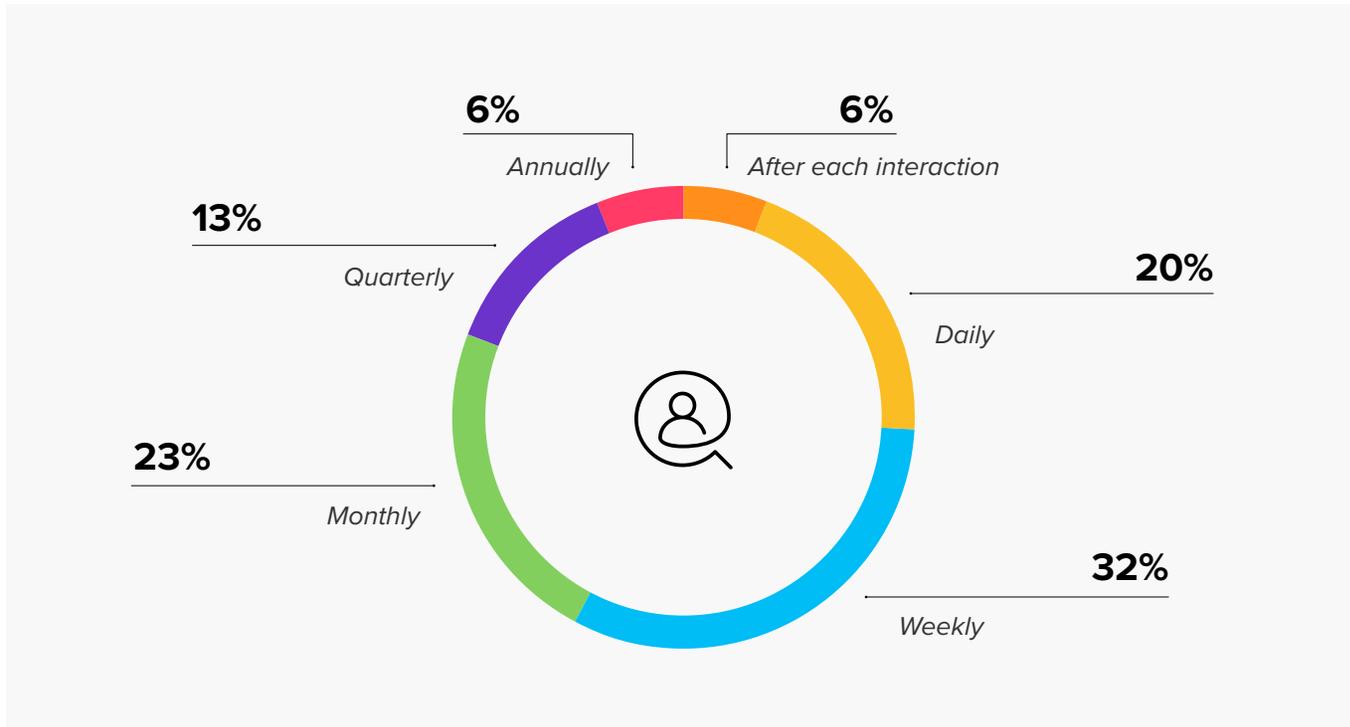


Figure 3

Self-assessment and performance metrics are two key components to evaluating the effect agents have on customers. Organizations need standardized ways to evaluate both AX and CX. Among our survey respondents, there are some standard metrics that organizations are using across the board — customer satisfaction (CSAT) chief among them (Figure 4).

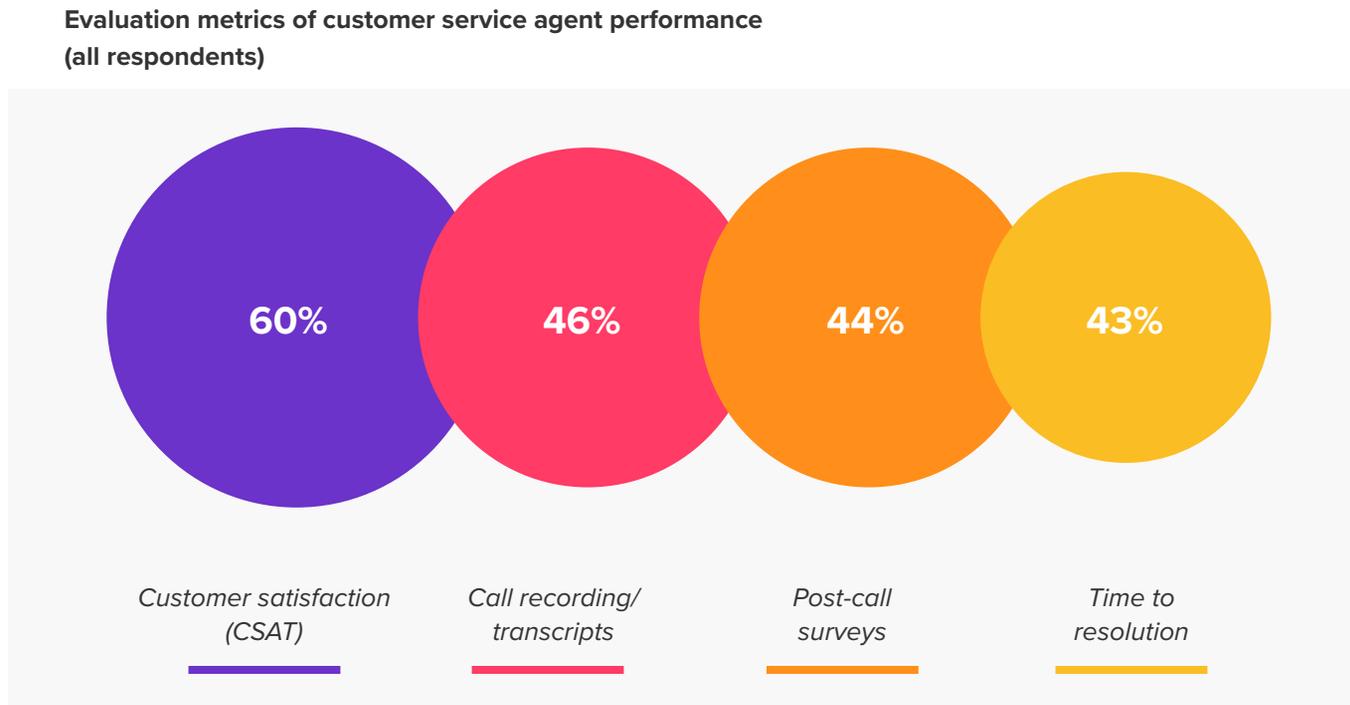


Figure 4

Supporting Customer Service Agents Positively Affects the Customer Experience

Management matters. Leadership's regular review of agent engagement data, discussion of the data with agents and using the data to recommend learning and development opportunities are critical actions to improving customer experiences.

In order to support their customer service agents, organizations need to do more than just collect data and ask agents to rate their own performance. Such data points should be part of a larger engagement strategy, which includes management reviews and actionable insights. Metrics should be used to generate action plans, not just stored in a memory hole. Leaders must celebrate positive behaviors. They can also use performance reviews and metrics to identify negative behaviors, encourage agents, build up engagement and improve on processes and practices.

A robust customer service agent engagement strategy does this and more.

Agent engagement data goes hand-in-hand with self-assessment; if employees and leaders keep frequent tabs on agent engagement they can identify and celebrate high engagement levels as well as notice and isolate problems before they become too big to fix. Thankfully, many organizations review agent engagement data. There's a great deal of reliance on managers in this area. Among survey respondents, leadership reviews are a top initiative and are used at three-quarters of all organizations (Figure 5). Other uses for agent engagement data include using it to recommend learning and development opportunities or targeting interventions and initiatives as needed.

What happens to customer service agent engagement data?
(all respondents)

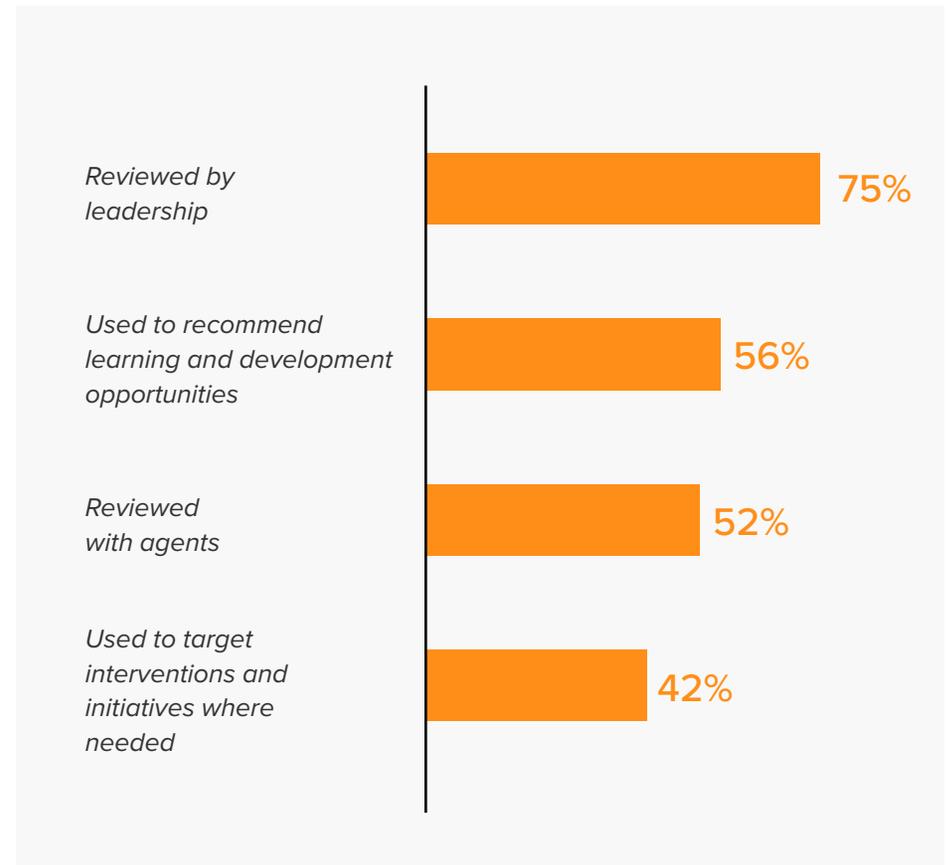


Figure 5

We've mentioned several times that metrics and self-assessment can be used to identify problems. But what exactly causes poor customer service? The number-one problem respondents believe causes poor customer service is workload (Figure 6). This is a significant problem that everyone is facing — not just customer service agents. Fallout from the [Great Resignation](#) means that people are currently leaving their jobs at unprecedented rates, and their positions are not always being filled (sometimes because it's just too difficult to hire people with the necessary skills), meaning the remaining agents are forced to pick up the slack.

Leading causes of poor customer service (all respondents)

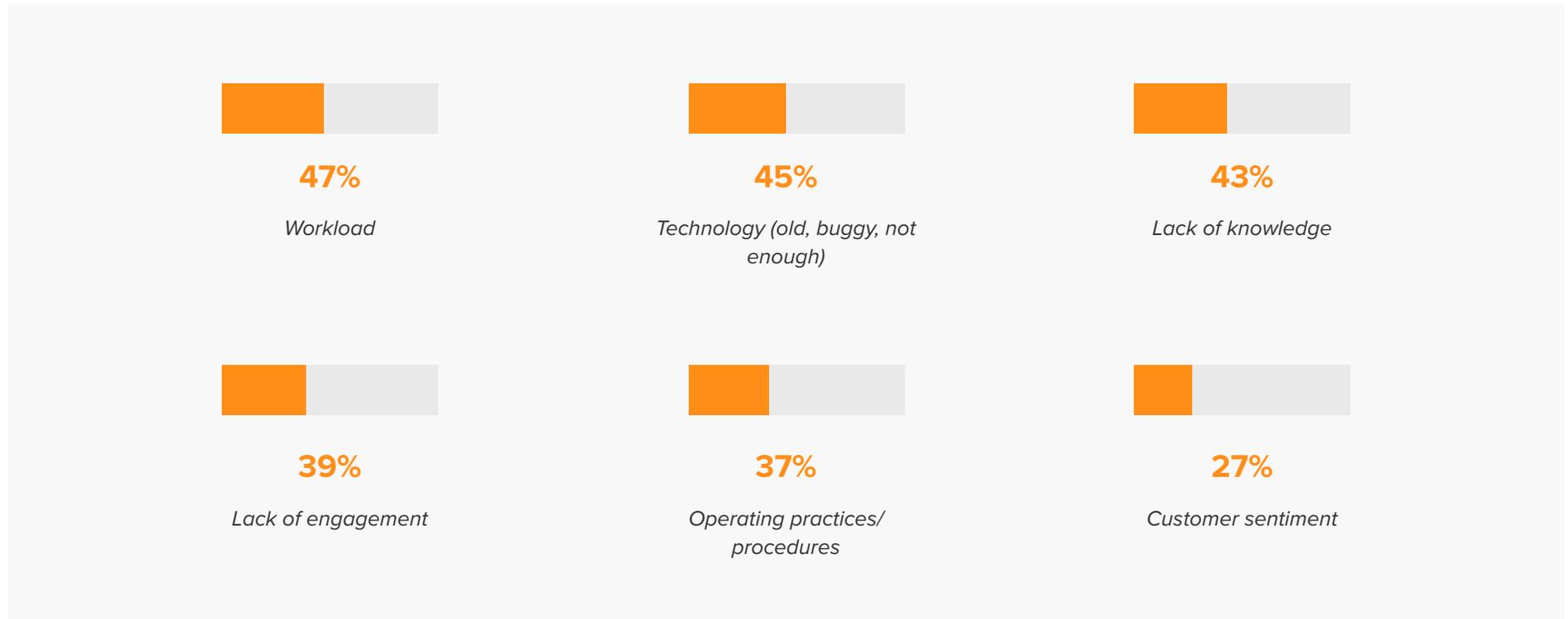


Figure 6

Workload will be a tough challenge to address over the coming years, especially as job switching continues in the wake of the Great Resignation. Because unhappy agents translate to unhappy customers, then there may be a lot of unhappy customers out there. (Although customer sentiment is low on the list of leading causes of poor customer service, an unvirtuous loop could commence, where agents are overworked, creating unhappy customers, creating a lack of engagement, frustrating customers and so on.)

Making happier agents

Hiring is a top priority for many organizations. While talent acquisition was outside the scope of this study, there are other alternatives to simply hiring more bodies to ease agent workloads. If your agents suffer from too much work and you can't hire fast enough or enough people to spread the responsibility around, another way to mitigate workload is through technology. Omnichannel communication technology that facilitates direct contact with customers using their preferred communication method, intelligent processes that encourage customer self-service and supplying agents with integrated support platforms and technology can take the churn work away from agents and relieve some of that pressure. These technologies also free agents from the low-hanging fruit of customer service work and directs their attention to more difficult tasks, which can improve their job satisfaction and with that, customer experience and satisfaction.



CX Technology Stack Maturity as a Reflection of CX Program Maturity

Besides the connection between AX and CX, another indicator of CX program maturity is the maturity of an organization's customer service technology stack. Organizations that struggle to improve their customer experience should create or re-evaluate their CX technology strategy, optimizing for effective customer service agent experiences. Organizations with mature CX technology stacks find agents more effective, see more positive outcomes and continue to re-invest in technologies that work. Their actions provide a blueprint that any organization can follow.

The connections made between agent and customer is only half the formula for agent experience and customer service success. The maturity of an organization's customer service technology stack is the other half. Our research indicates organizations that struggle to improve the customer experience typically don't have a centralized strategy for its customer service technology. This lack of strategy impacts agents and customers alike.

Moreover, we found that the more advanced the technology stack, the more likely the organization is to continue to invest in customer service technology. Clearly organizations with a centralized strategy are onto something and feel their investments have paid off well enough to continue to invest in the strategy. The findings presented here can be used to make the case for having a centralized CX technology stack.



CX Technology Stack Maturity, Defined

How do we define maturity? In the survey we asked the question, “How mature is your organization’s customer service technology stack? Respondents were given three options:

- No centralized strategy
- A centralized strategy in the implementation phase
- A fully implemented centralized strategy

Depending on their answers, we grouped respondents into three categories: Beginner, Intermediate and Advanced (Figure 7).

When viewing the survey results through the lens of technology stack maturity, several trends emerged. In many areas, Advanced organizations did more, saw more results and made more investments than Intermediate organizations — who in turn, reported more results and investments over Beginner organizations. Advanced organizations are more than twice as likely as Beginners to say that improving CX is a high priority for them. And their approaches must be paying off — they’re also 25% more likely than Beginners to say their budget is increasing for CX technology (Figure 8).

Customer service technology stack maturity (all respondents)

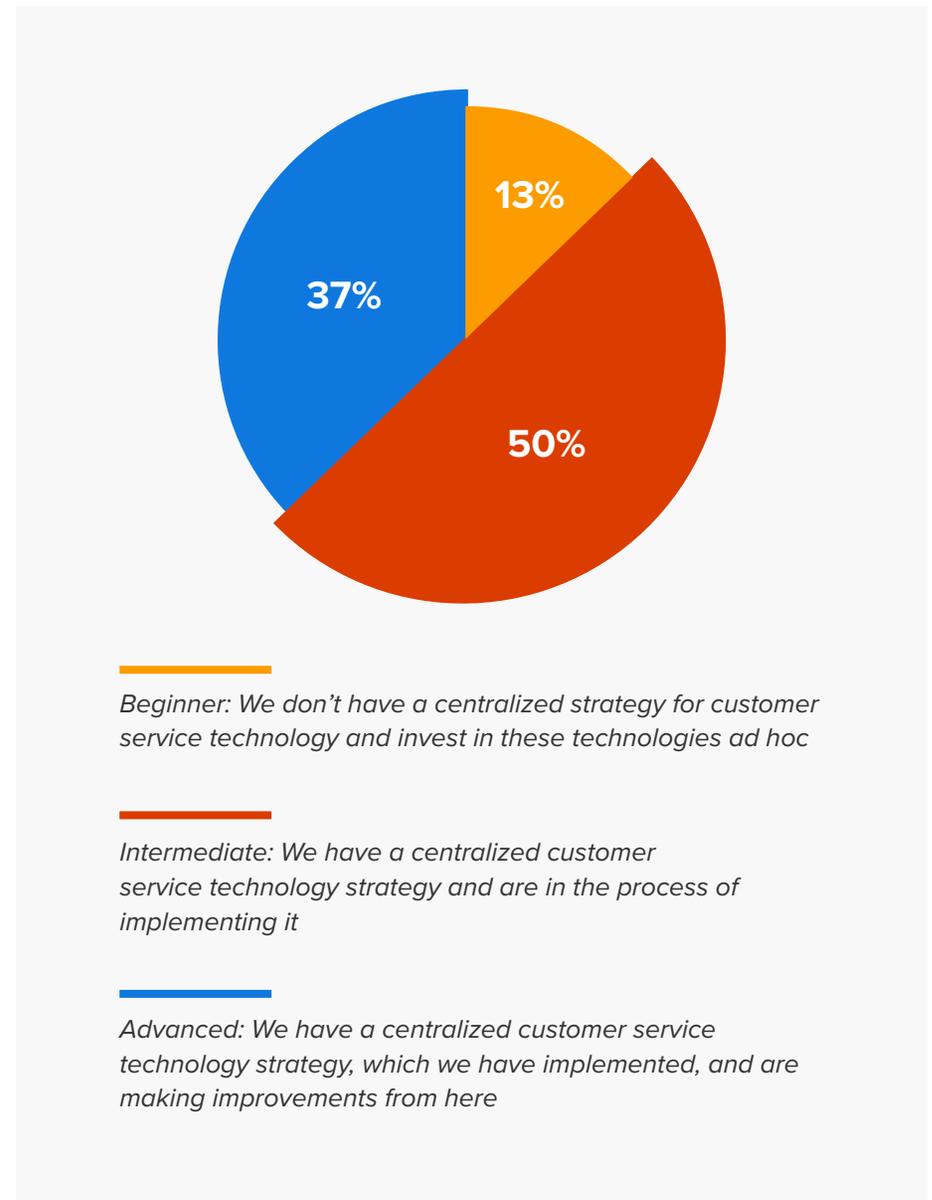


Figure 7

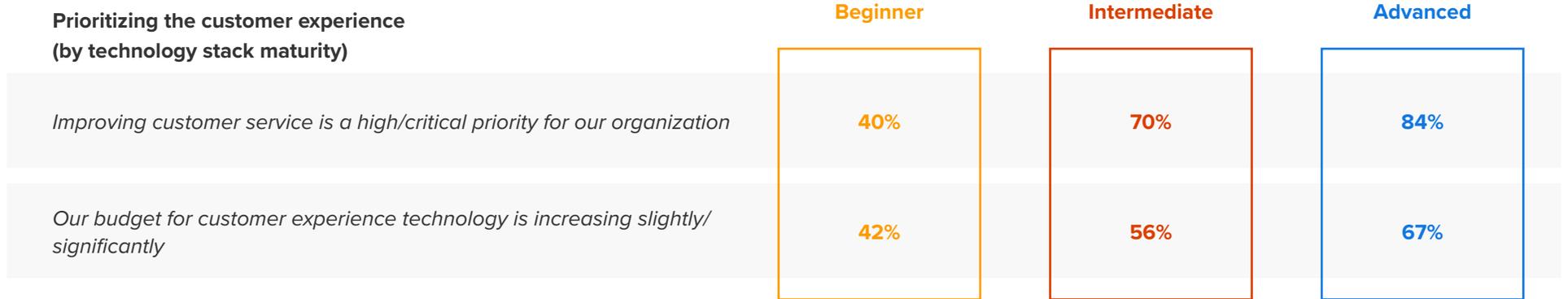
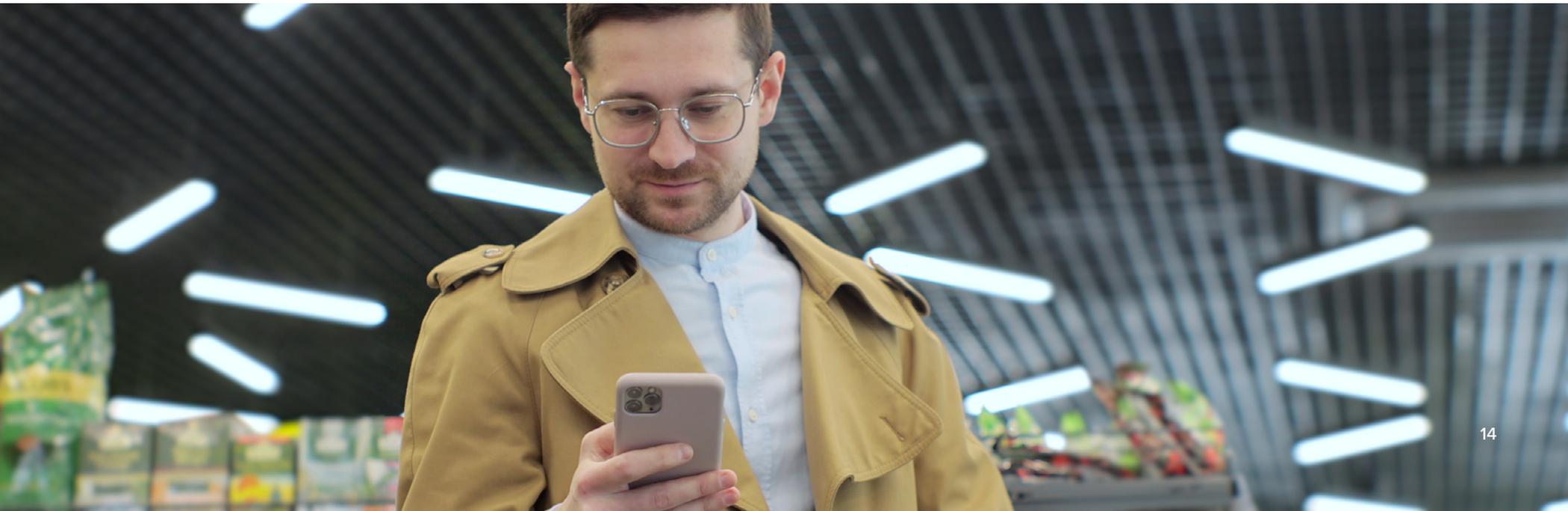


Figure 8

How do Intermediate organizations follow through on improving the customer experience? Simply put, support.

- Support for customers through omnichannel reach.
- Support for agents through frequent opportunities for self-assessment.
- Support for agents through multiple evaluation methods and metrics.
- Support during customer interactions and actionable insights derived from metrics, measurement and assessments.



The greatest change Beginner organizations can make today is to come up with a centralized strategy for customer service technology. This action greatly affects organizational customer service efforts, as we shall soon see.

Going beyond the baseline

As we saw in Figure 1, the baseline channels for customer support are email, voice and video. For these channels, adoption and use is similar across all three maturity levels. But looking beyond the baseline, expansion into other channels as part of an omnichannel strategy increases as organizations develop a more mature customer service technology stack. The Advanced group is more likely to interact with customers in more channels, including live chat, bot-assisted chat, texting and more (Figure 9). This can increase customer satisfaction by meeting customers where they are, making the customer experience more seamless and effective, something that can be a challenge to delivering great customer service.

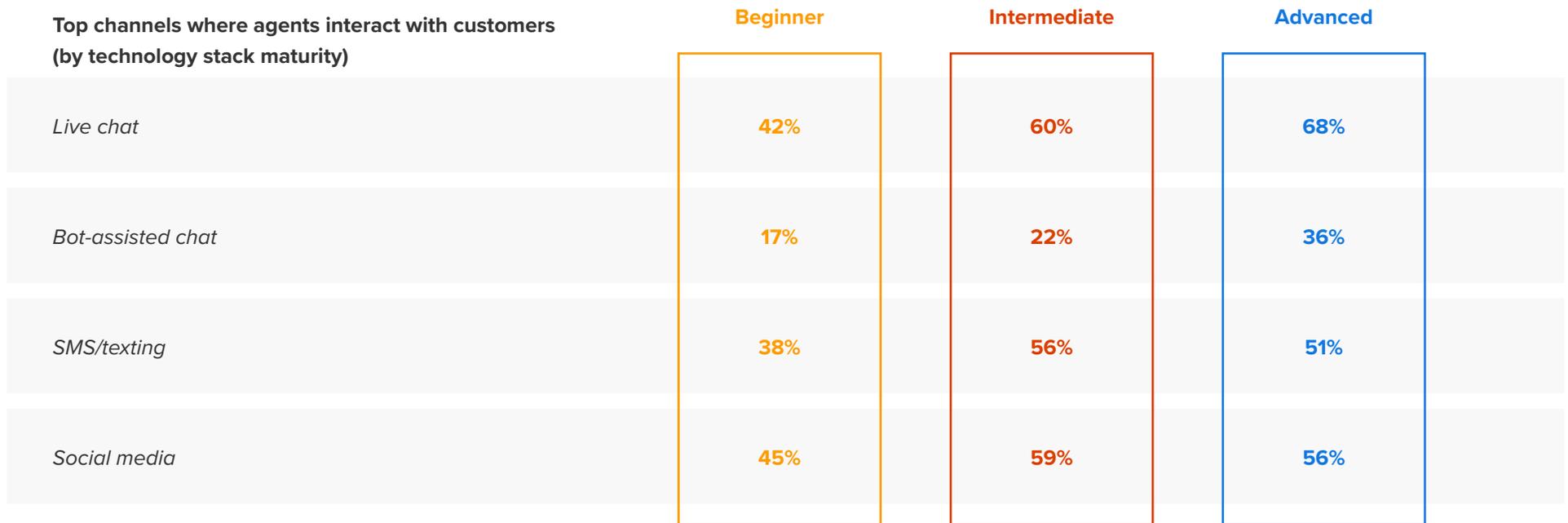


Figure 9

Supporting agents by providing self-assessment opportunities

The more mature an organization's technology stack, the more likely they are to give agents the chance to self-assess at least monthly, if not weekly, daily or after each performance. While a third of Beginner organizations only give agents the chance to review their own performance quarterly or less often, this drops to one in five Intermediate organizations and one in six Advanced (Figure 10).

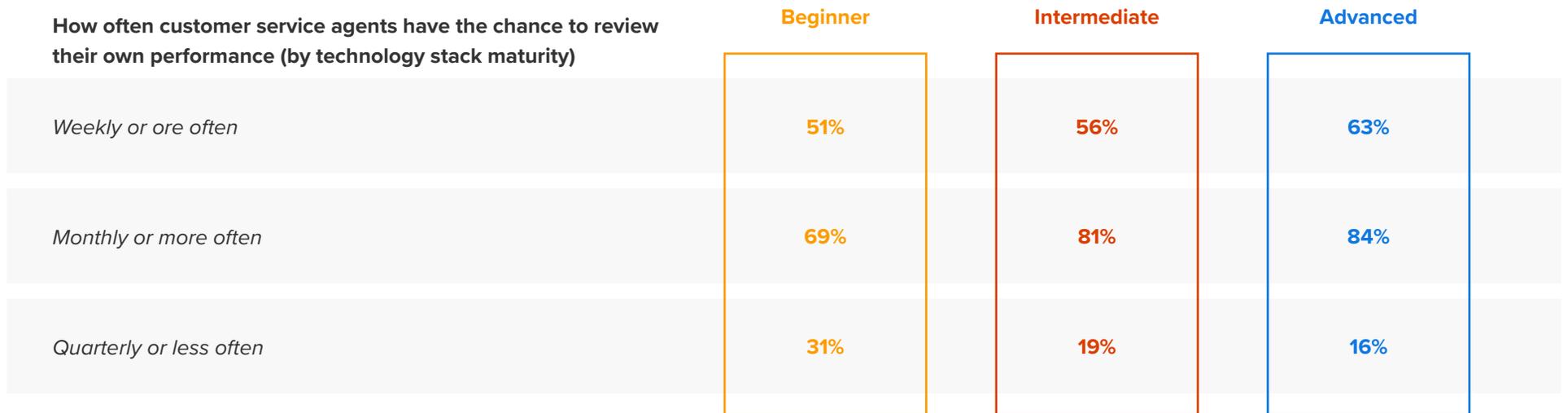


Figure 10

Supporting agents by employing multiple evaluation methods and metrics

Alongside giving agents more frequent opportunities to self-assess, Advanced organizations rely on more metrics and measurement tools to assess agent performance. The baseline metric is customer satisfaction (CSAT), which we saw in Figure 4 and which around 60% of organizations use — at all maturity levels. However, more Intermediate and Advanced organizations report using evaluation metrics beyond CSAT. Advanced organizations are in some cases twice as likely as Beginners to track metrics such as post-call surveys and call recordings/transcripts to better assess performance (Figure 11). CSAT might be the standard, but more Intermediate and Advanced organizations report supporting their agents in other ways.

Additionally, Intermediate and Advanced organizations leverage the more qualitative assessments of surveys and recordings over quantitative assessments such as productivity and call duration metrics. Prioritizing qualitative assessments demonstrates organizational intentionality about agent performance evaluation, which is likely preferred by agents over being judged simply on quotas.



Figure 11

Supporting agents in their customer interactions

Another area where Intermediate and Advanced organizations support the agent experience is in their interactions with customers. In this era of fickle customers who expect great experiences no matter what channel they're on, agents need all the help they can get to deliver exceptional experiences. As organizations develop and implement a centralized technology stack maturity, more of them report supporting agents with things like learning opportunities, toolkits, knowledge bases or shadowing (Figure 12). Like metrics and measurement, the more advanced your technology stack is, the more likely your organization is to support your agents in any number of ways.

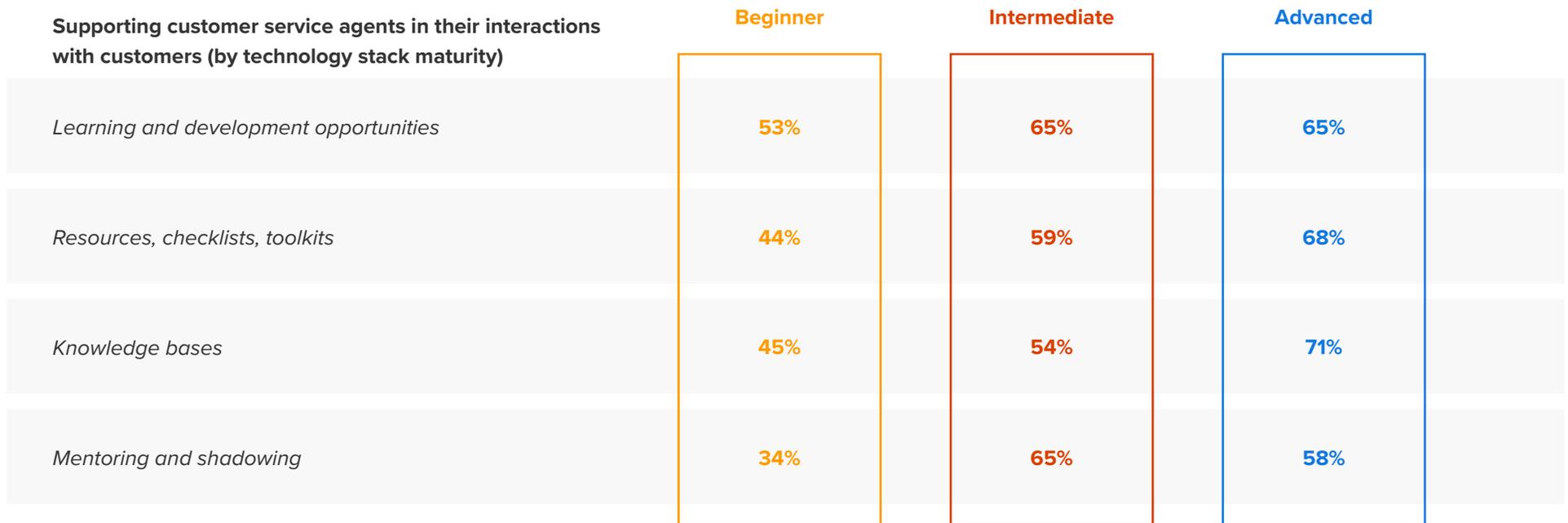


Figure 12

Supporting agents by making data actionable

As companies centralize their technology stack, more of them report taking action on agent data. While all organizations (regardless of maturity) say that leadership reviews engagement data, more Intermediate and Advanced organizations take action in areas like learning opportunities or initiatives than Beginners (Figure 13).

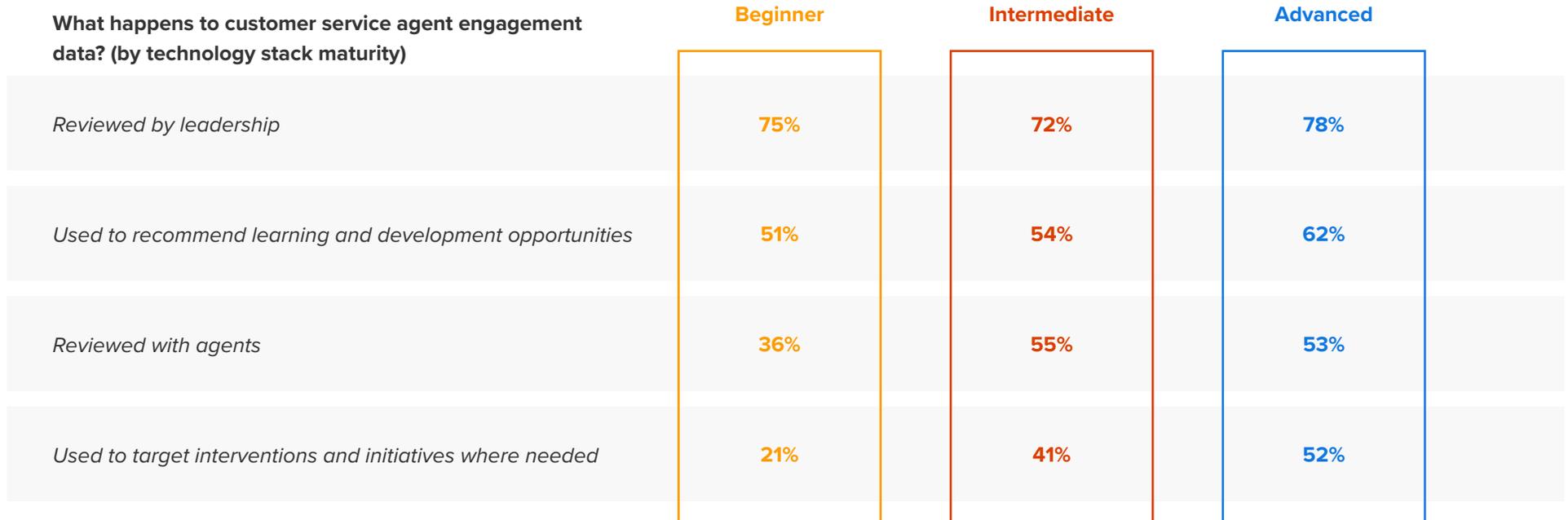


Figure 12

Supporting agents by reviewing more

Is there a correlation between customer service technology stack maturity and workload complaints? Results point to some shifting priorities when viewing the causes of poor customer service by maturity. For the Beginner and Intermediate groups, the leading causes of poor customer service are workload, poor tech and a lack of knowledge, in that order. However, for the Advanced group, the top cause of poor customer service is a tie between a lack of knowledge and poor tech, with workload being third (Figure 14).

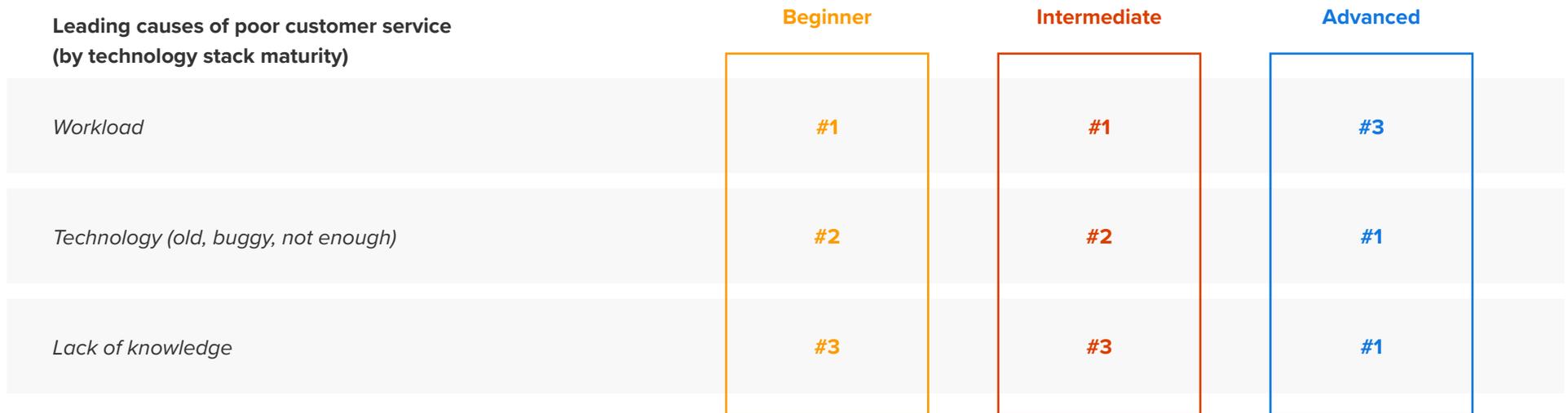


Figure 14

This could be explained by the greater number of ways Advanced organizations support their agents. Technology reduces repetitive customer service tasks through automation and omnichannel communication. Additionally, technology aids in collecting the quantitative and qualitative metrics used to evaluate and assess agent and process performance — assisting supervisors and leaders in knowing what support agents need most. Technology also helps agents access needed knowledge and information in real-time, creating more robust, accurate and informative customer support experiences.

By taking a proactive approach to agent assessment, Advanced organizations are seeing results in reducing the impact workload has on CX. The investments they’re making are paying off enough for Advanced organizations to focus on more advancing technology and knowledge management. Organizations with more advanced technology stacks are seeing the most improvement to their workloads, which is a really good reason to keep investing in technology.

In their own words

The data tells a compelling story: improving customer experience is an imperative for businesses to increase customer retention and drive revenue. Improving customer experience also has a direct and positive impact on customer service agent experience. Likewise, agents with more robust support and enhanced experiences have a direct and positive impact on customer experience. Mature customer service programs acknowledge the criticality of customer experience to their business and continue to invest in tech, processes and agent growth, while actively mitigating workload and knowledge burdens.

But what do respondents think?
More importantly, given the opportunity to improve the customer experience over the next year, what would they change?



In open comments, the things respondents would change around customer service fall roughly into similar buckets. Generally, respondents want the following things:



Better trained and knowledgeable agents



Leadership engaging more with their direct reports



More performance reviews — both self-review and management review



Better communication and collaboration among agents



Staffing and retention issues addressed



Better and more advance technology and tools

These required-change buckets align with our quantitative analysis of what organizations are doing and where they could be doing more. Technology tools can address many of these concerns in one way or another. Having a centralized strategy for customer experience technology gives agents the ability to communicate and collaborate more effectively with each other. Tech and tools, especially ones that leverage newer innovations in AI or automation, can improve poor customer service, making it easier for agents to do their jobs, thus increasing agent engagement. Leaders who understand the importance of agent experience as it relates to customer experience increasingly invest in ongoing improvement of the critical elements of their customer service programs. The Advanced group in particular leans heavily on its managers to review, evaluate and improve agent performance. The open comments suggest that many respondents would like this to continue.



Q: What one change would you like to see in the next year to improve customer service agent experiences at your organization?

—Respondent open comments

STAFFING/WORKLOAD

“ I believe we need more people in customer service. Specifically, We need evening and weekend staff. Our current daytime staff is stretched too thin being called upon during evenings and weekends. ”

COMMUNICATION/LEADERSHIP

“ Adopt modern tools and technology that are usable, user friendly and productive. ”

TRAINING

“ More support for agents to deal with difficult customers/calls. ”

TRAINING/EVALUATION

“ More specific training for the customer service agent and more frequent checkpoints to address questions or performance issues. ”

TECHNOLOGY

“ Technology advancements and unifying systems to avoid confusion and allow agents to be more efficient while servicing our customers. ”

Conclusion

If your organization doesn't have a centralized strategy for customer service technology, the biggest thing you can do to support your customer service agents is develop a strategy. Just starting to implement a strategy can do wonders for your agent support. As we've seen when viewing survey results by maturity, while the statistical differences from Beginner to Advanced is impressive, even moving from Beginner to Intermediate produces measurable results.

The business case for developing a centralized strategy for customer service technology is evident. Well placed tech and tools can provide significant support to your customer service agents, making them more effective and able to provide excellent service to your customers. Organizations with centralized tech strategies leverage advanced technologies to their advantage, like omnichannel communications to reach customers where they are, or process automation and knowledge management that can make agent workloads more efficient. These capabilities give agents more time to reflect on their work, which leans heavily on managers to provide support. While everyone agrees that the customer experience is critical to business success, advanced organizations especially, are more likely to put more budget dollars back into technology, recognizing the gains they've made thus far when improving both the customer and agent experience.

Alongside manager support, technology does plenty to support both customers and agents. Giving customers the option for choosing a preferred outreach method (through omnichannel communications) means customers get answers on their own terms. Using a mix of tech-based interfaces (chatbots) and self-service options (FAQs, knowledge bases) reduces agent workloads by eliminating support needs that can more readily be solved without direct agent action.

Additionally, organizations with a centralized technology strategy are seeing their efforts paying off, turning their attention to other causes of poor customer service, such as technology and knowledge management. Organizations can support agents by providing the right technology as part of a centralized customer service technology strategy. In doing so, they'll create better agent experiences and better agents, who will do more to support customers and deliver great experiences.



Appendix

Demographics

Survey name

Improving Customer Service Agent Experiences

Survey dates

February 2022

Number of respondents

611

Respondent career level

Manager: 61%

Director level and above: 31%

Respondent gender

Male: 54%

Female: 44%

Transgender: 1%

Nonbinary: 1%

Respondent generation

Baby Boomer: 12%

Gen X: 31%

Millennial: 49%

Gen Z: 9%

Employee size

Less than 100: 13%

100-249: 9%

250-999: 14%

1,000-2,499: 15%

2,500-4,999: 13%

5,000-9,999: 13%

More than 10,000: 24%

Top represented industries

Retail: 17%

Finance and insurance: 12%

Business and professional services: 11%

Health care: 9%

Manufacturing: 8%

Software: 6%

Construction: 5%

Hospitality: 5%

All other industries make up less than 5% of respondents.

Workforce distribution

One country, one location: 26%

One county, multiple locations: 40%

Mostly one country, some global distribution: 14%

Highly distributed: 16%

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