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# Change management blueprint for contact centre digital transformation

By Roy Atkinson

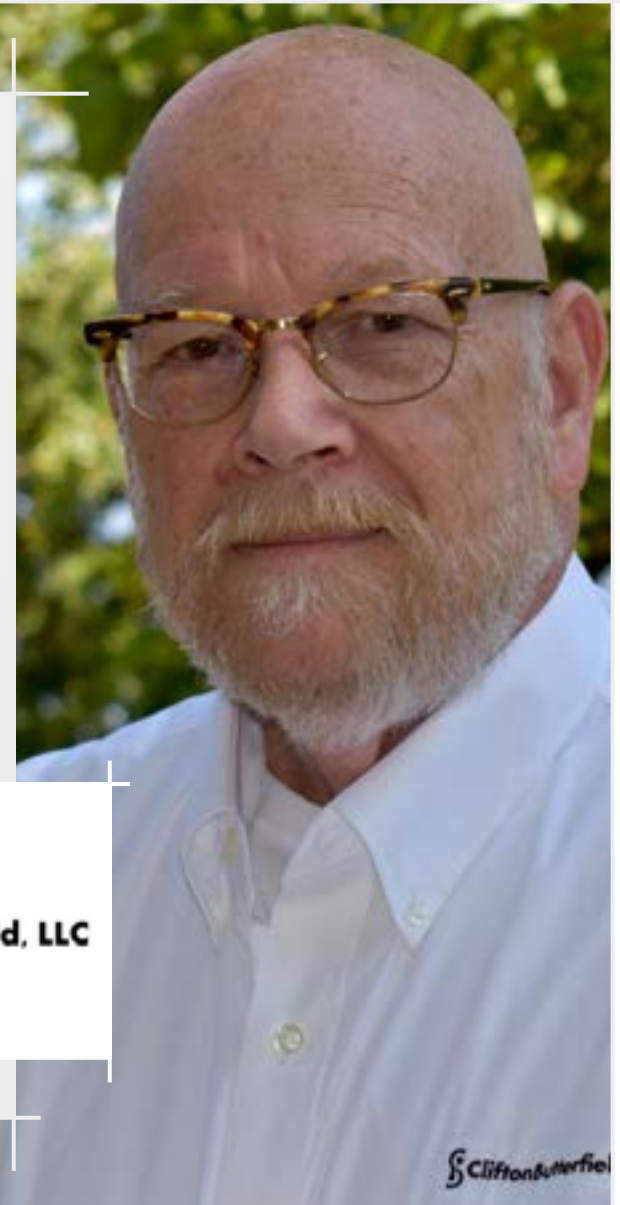
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In his role as CEO and Principal Advisor, Roy advises the technology and contact centre communities with expertise accumulated from decades of experience in IT, customer service, and business advisory positions. He is also a Fellow of the Institute for Digital Transformation. His specialisation on the connection between customer service and technology is a common thread in his writing, presentations, and research. He is recognised on many top influencer lists, including a Top 50 Thought Leaders by ICMI, Top 150 Global Customer Experience Thought Leaders of 2020 by SurveySensum, and Top 50 Customer Service Experts of the Decade 2010–2020 by Nextiva.



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# 2020: The accelerant of the digital transformation imperative

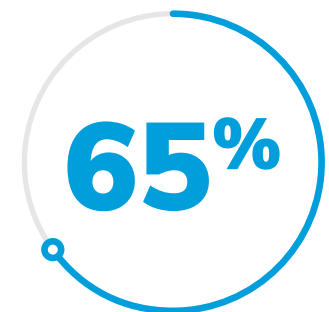
The COVID-19 pandemic put organisational change into hyperdrive. Businesses were compelled to move to work from home or hybrid working models, which changed the ways they distributed work and communicated. Agents could no longer turn to someone sitting next to them or raise a hand for assistance. The entire flow of work became dependent on technology.

Not only did businesses rapidly and radically shift in 2020; consumers shifted as well. In the United States, [e-commerce grew by 44% in 2020<sup>1</sup>](#) and [the global rise is estimated at 24.1%<sup>2</sup>](#), but supply chains were disrupted as demands on delivery companies soared. Customers had to deal with lengthy hold times or wait days—or even weeks—for an email reply. Governments adjusted regulations, mandates, and guidelines frequently and rapidly. Business agility and resilience became paramount, and many organisations needed to accelerate technology implementations and change their thinking and policies about remote working.

The pandemic forced industry leaders to make major changes. In fact, 80% of businesses fast-tracked at least some digital transformation in 2020.<sup>4</sup> They adopted digital tools and technology to support strengthening cybersecurity, remote work, and customer and employee experience. Digital provided opportunities for improvement as well as future possibilities: new ways of working, channels of communication, automation, and benefits of new tools and data integration. Sixty-five percent of leaders now agree that companies must digitise in less than five years or face “doom.”<sup>5</sup> This sink or swim imperative is driving many organisations to evaluate and change their approach.



of customers say the pandemic raised their standards for customer service<sup>3</sup>



of leaders now agree that companies must digitise in less than five years or face “doom”<sup>5</sup>

# The contact centre is no longer the last touchpoint in the customer journey

The Institute for Digital Transformation's definition of digital transformation alludes to the underlying impact, and why organisations need to pay attention to their approach.

“**The integration of digital technologies into a business resulting in the **reshaping of an organisation that reorients it around the customer experience, business value and constant change.**”**

— The Institute for Digital Transformation<sup>7</sup>

## Benefits of change management

- Aligns stakeholder goals and expectations
- Maximises organisational readiness
- Enables large scale transformation
- Accelerates transition to future state
- Improves employee engagement

## From

- Infrequent upgrades
- Project based process improvement
- IT driven control and governance
- Resource heavy manual processes
- Rigid workforce management
- Fully human workforce

## To

- Rapid innovations
- Continuous improvement / quick cycles
- Business driven CX Centre of Excellence
- Digital first / digital centric processes
- Workforce agility / flexibility
- Hybrid workforce

If the result of digital transformation is a reorientation around customer experience, then the contact centre becomes more than just a touchpoint on the customer journey. Customer relationships can be made or broken through the insights, information, support, and communication by and through the contact centre. And the data generated by the contact centre can be shared with the larger organisation to construct a better 360-degree customer view.

What this means for contact centre leaders, is that the contact centre has an important impact on the business' bottom line: CX leaders have historically seen 3x higher returns vs. laggards.<sup>8</sup> Any transformation to the contact centre is risk and impact that will echo throughout the full business, organisation-wide, and top-to-bottom deep.



**3X**

CX leaders have historically seen 3x higher returns vs. laggards<sup>8</sup>



# Contact centre digital transformation fails without change management

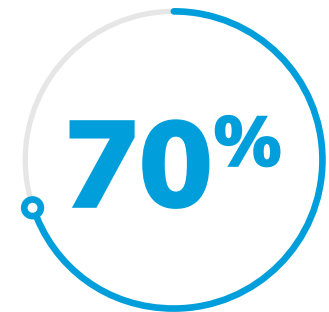
Industry reports have shown that most attempts at digital transformations are not successful. Technology implementations have too often proven difficult and not yielded the expected results. What the smartest organisations have discovered is that technology in and of itself does not produce positive change. Positive organisational change *enabled by* digital technology is far more effective.

“**Not just a technology initiative, digital transformation also has a heavy emphasis on redefining jobs, gaining organisational buy-in, and fundamentally changing processes, products, and service offerings.**”

— NICE CXone<sup>10</sup>

Note how this definition of transformation similarly highlights the concept of “reshaping of an organisation” with “fundamentally changing processes.” **Organisational change is the key difference between a digital technology implementation and digital transformation.**

Full-business changes of this nature cannot be made without commitment at the highest organisational level. This is an integral first step to well-executed organisational change management (OCM).



of complex, large-scale change programs don't reach their stated goals<sup>9</sup>

# 12 critical pillars for successful digital transformation



**Establish a powerful vision**



**Ensure accountability for actions**



**Leaders own and commit to change**



**Understand the scale, scope, endurance, and impact**



**Include stakeholders, employees, and IT as partners in change**



**Commit sufficient resources and capabilities**



**Establish clear goals**



**Communicate change transparently**



**Provide effective planning and program management**



**Address and mitigate resistance to change**



**Prioritise tactics**



**Measure outcomes and impact**



# The steps of organisational change management

Organisational change management (OCM) is a formalised action plan of tasks that supports a seamless transition from the way things are to the desired state, accounting for the least obstruction and disruption possible. OCM is an essential component of contact centre transformation from the inception of change because it helps identify risks and contingencies that might impact your ability to achieve your goal. Bringing it in as an afterthought may not be enough to rescue a transformation gone wrong.

## Elements to include in an OCM plan:

### **Vision**

What will the future look like and what are the organisational goals? Why are the changes being made?

### **Resources**

When undertaking fundamental changes of the kind described here, people need information, support, and an understanding of whom to go to when they need something

### **Skills**

Agents, supervisors and managers will need to know how to use the new tools in new ways. Training and ongoing coaching are essential

### **Incentives**

Employees will want to know what's in it for them. How will it make their work easier and better?

### **Action plan**

Those affected by changes want and need to know what is going to happen and when it's going to happen

# Five key steps for contact centre digital transformation

**1**



**Prepare for change**

**2**



**Build coalition, establish partnerships**

**3**



**Align technology to transformation goals**

**4**



**Establish and implement change plans**

**5**



**Measure and improve**

## Step 1: Prepare for change

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### Define vision and establish goals

Your 'why' should be your transformation elevator pitch. It's something you can deliver in 60-seconds to get people aligned and on board with change. Your 'why' for change shouldn't be specific to your goals but should address the shared goals across your business and stakeholders.

For contact centre leaders facing change initiatives, customer outcomes will act as a compass that keeps every department in your company aligned on the same goal. Often, the 'why' is the heart of your customer experience strategy—or the best possible end-to-end customer journey for your company.

Once you have a clear vision established, the next step in the management of these changes is to clearly articulate and document the direction and goals of the contact centre transformation and to understand the full business scope of the changes required.



## Step 1: Prepare for change

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### Assess organisational maturity

Taking an honest look at where your company stands, and how capable or ready you are for your initiative can help you plan appropriately for the endurance it might require. Maturity models, like the NICE CXone example on page 13, use a set of formal criteria to examine your current state and can give an understanding of where your company stands in terms of various aspects and what changes you need to make:

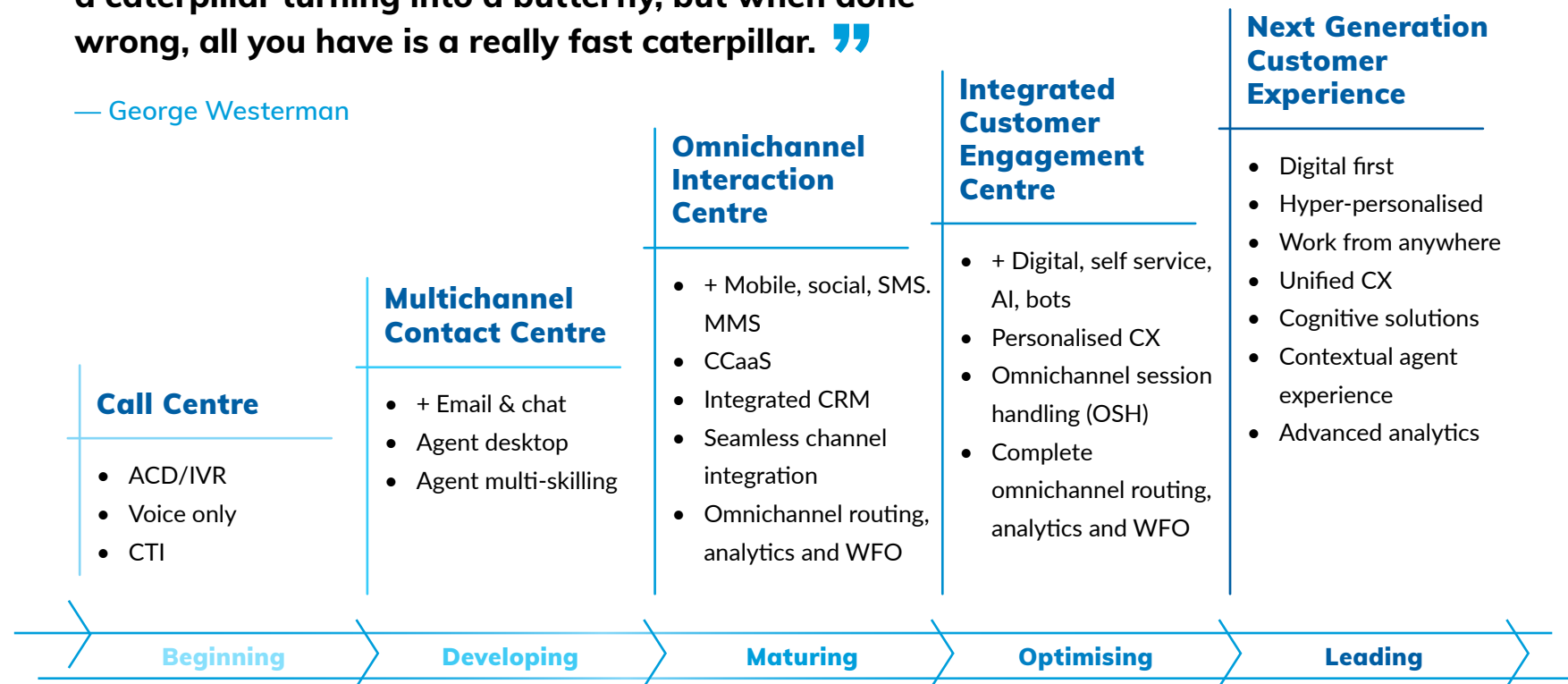
- **Customer**      Do you have the experience and channels in place to support the customer's expectations?
- **Employees**    Are you appropriately staffed to support changing volume, with the right skills and training?
- **Operations**    Do you have the processes, tasks, and tools for efficient and effective management of business?
- **Data**            Can you easily access and pull reports of data and metrics to assess trends, strategise improvements, and maximise business value or customer outcome?
- **Technology**    Do you have the right technology stack and integrations that support seamless customer and employee experience, operational and data requirements?

To get from where you are today to your future state could require a phased approach. Sometimes, a quick win or tackling your lowest hanging fruit first is the proof you need to establish success and gain alignment on larger initiatives.

# What is contact centre digital transformation?

“ When digital transformation is done right, it’s like a caterpillar turning into a butterfly, but when done wrong, all you have is a really fast caterpillar. ”

— George Westerman



\*George Westerman, Harvard Business Review: “Leading Digital: Turning Technology into Business Transformation” (2019)

## Step 1: Prepare for change

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### Analyse the impact

Transformation will affect some individuals more than others, and the committed participation of these key people will have a significant effect on the outcome.

Be able to answer every employees' "What's in it for me?" People—especially the key stakeholders—need to understand the tangible benefits that will accrue to the organisation as a whole and them individually. They need to be motivated to drive change that will benefit the organisation.

Working through surveys, focus groups, or questionnaires, seek to identify two groups of people: Your staunch allies and your toughest opponents. Consider them in your planning to ensure the outcome brings all perspectives on board. Listen to what they say—and revise your approach accordingly.



## Step 1: Prepare for change

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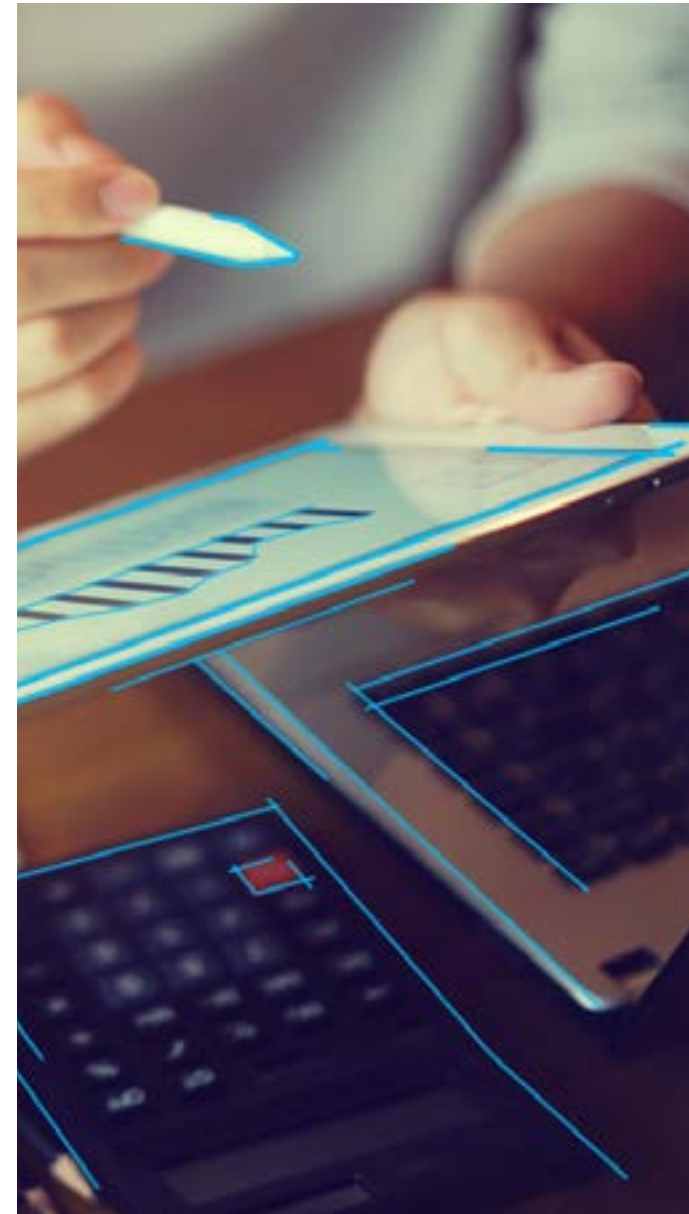
### Build the business case

To begin building a culture of support for your initiative, you might need to establish a formalised business case. The business case for transforming the contact centre rests on four pillars. To justify the investment, the transformation must:

- State the business problem
- Demonstrate the expected return on investment (ROI)
- Improve customer experience and employee experience
- Align with the organisation's strategic goals

A business case needs to include information on how progress and performance will be measured. There should be information about the current state, forecasts of the future state, and enumeration of the measures of progress from current to future.

Although there is ample advice available on what to include in the business case, it's also important to think about how to present it, and to whom.



## Step 2: Build coalition and establish partnerships

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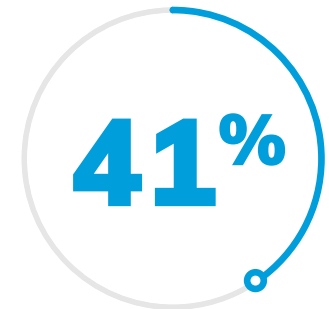
### Secure an executive sponsor

To move from the present to the desired state, gain a C-suite sponsor to rally the support for future change. Your vision and business case helps them see change as their responsibility and gives them a script for communicating and encouraging the disruption mentality needed to support the transformation.

Top executives and the board of directors must be convinced that this is the right move at the right time, and that it will yield business benefits. Since the contact centre is an essential part of the customer experience, this transformation is high-visibility and high risk.

Taking the business case to the C-level or board of directors is far more likely to succeed when you:

- Identify and consult influential allies within senior leadership
- Work with them to hone the business plan and message
- Give them the information they need to work with you



41% of CX leaders say primary challenge with improving CX is lack of shared senior management vision<sup>11</sup>



## Step 2: Build coalition and establish partnerships

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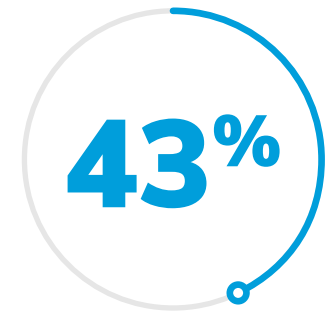
### Identify stakeholders and build coalition

Although setting the vision, strategy, and commitment comes from the top, the transformation can only be accomplished through the efforts of stakeholders throughout the organisation. The stakeholders must be moving in the same direction, guided by shared vision and strategy.

Awareness, acceptance, and advocacy need to flow from the top of the organisation to the front-line agents to accomplish success. The more fully developed your early planning is, the more likely you will reach your desired outcome, but you must be willing to adapt based on feedback.

“ **A transformation’s success also requires that people across the organisation have a specific role to play and that everyone knows how to carry out his or her part.** ”

— McKinsey<sup>13</sup>



of leaders say employees resisting cultural change is one of the largest impediments to improving CX and EX<sup>12</sup>

### Establish a partnership with IT

Because so much of the transformation revolves around technology, a solid working partnership with your organisation’s IT department is critical to success. Even if every new tool will be cloud-based, your IT team is still responsible for infrastructure and security.

## Step 3: Align technology to transformation goals

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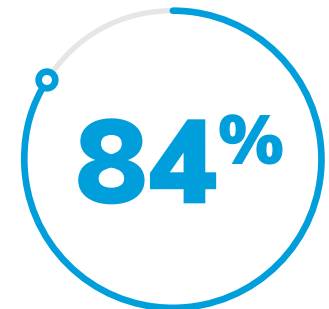
The technology decisions you make should examine not only what technology supports your goals, but also what will deliver the efficiencies and cost savings needed. Consider including a roadmap of how the reinvented processes, procedures, and tools will change how work gets done and—more fundamentally—the kind of work there is to do.

A few areas of maximum impact for digital transformation:

- Prioritise effortless self-service
- Virtual-first workforce of agents with expanded skills
- Effortless and seamless digital-first omnichannel

### Prioritise effortless self-service

One of the key shifts in contact centre strategy during recent years has been the emphasis on self-service. According to the NICE CXone 2020 Customer Experience (CX) Transformation Benchmark Survey of Global Customer Experiences, 84% of customers are “More willing to do business with companies that offer self-service.”<sup>14</sup>



84% of customers are “More willing to do business with companies that offer self-service”<sup>14</sup>

### Step 3: Align technology to transformation goals

Design flaws and information gaps in self-service can actually increase demand, according to [Call Centre Helper](#).<sup>15</sup> But when well designed and executed, self-service can reduce agent-assisted contact volume, including repeat calls and escalations.<sup>16</sup> Consider these tools and technologies to support effortless self-service:

#### Chatbots or virtual agents

Chatbots can be used for staff augmentation, such as basic coverage during off-hours and to handle the simplest, most frequent inquiries. As the bots learn and improve, they can be further integrated into the contact centre workflow, acting as digital partners to agents. Chatbots should provide correct information to customers, seamlessly connect the customer to a live agent, and integrate so that the information gathered in the chat is presented to the agent in real time.



Get your copy of the **“Chatbot Starters Guide”** to learn about types of chatbots, solutions that might work for you and get more best practices.

[Download](#)

### Step 3: Align technology to transformation goals

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#### Comprehensive, up-to-date knowledge base

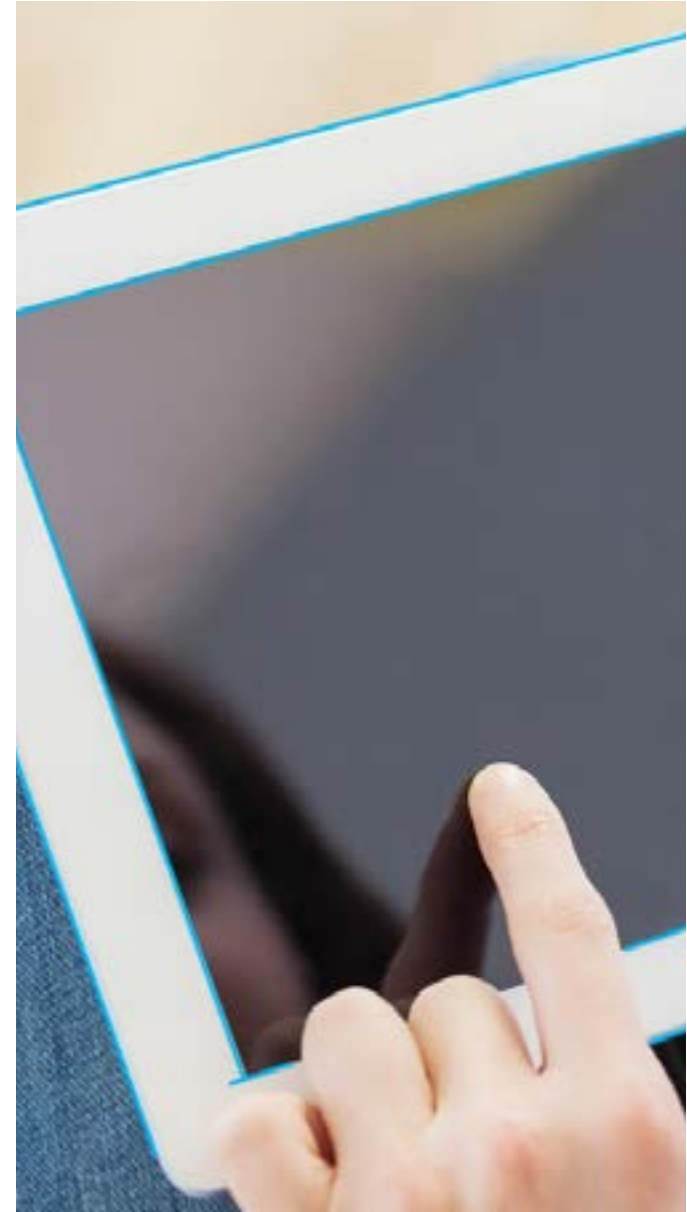
Traditionally, customers and agents have found answers by searching the organisation's [knowledge base](#). Their success depends on the accuracy of the knowledge and ease of findability. Having to choose among multiple results—or finding none at all—slows customer interactions down and both decreases customer satisfaction and increases costs.

AI and machine learning tools can digest existing knowledge and data much faster than humans and can help steer agents to the best response faster and more accurately. Providing consistent answers and solutions for customers is an integral part of building a better customer experience.



Learn more about the role of self-service in the eBook,  
**“Effortless service, happier customers.”**

Download



### Step 3: Align technology to transformation goals

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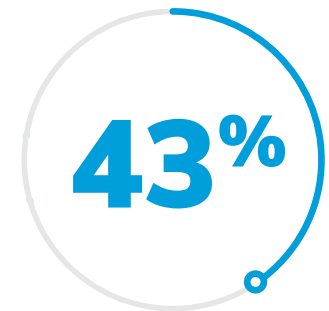
## Virtual-first workforce of agents with expanded skills

Self-service automates routine interactions leaving what's inherently more complex for the agents. These interactions can involve account access, payment and collections, product defects or damage, and other queries that involve policy interpretation, customer service guidelines, even external regulation and compliance questions, such as data privacy.

These complex contacts have always existed but were a relatively small percentage of overall volume. When complexity becomes the rule rather than the exception, agents will need additional skill sets and tools.

### Streamlined tools and desktop

A unified desktop that facilitates agents supporting multiple channels and even multiple interactions at a time, provides access to integrated customer data and agent support tools in one place will help save 16% of agent time spent looking for data across four to seven apps.<sup>18</sup>



43% of contact centres experienced an increase in contact complexity the past year<sup>17</sup>

## Step 3: Align technology to transformation goals

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### AI-enabled WFM system

A virtual-first workforce needs on-the-go tools and mobile apps for easy scheduling and staffing. Moving to an [AI-enabled WFM system](#) leverages existing data and predictive scheduling and routing to reduce effort and increase accuracy. AI-powered tools can surface trends across time, helping you ensure proper coverage through annual or periodic peaks and troughs in demand, through work-from-home (WFH) or hybrid working or work-from-anywhere (WFA).

### Improved ongoing training focusing on soft skills

Increased complexity means agent soft skills and traits like empathy, critical thinking, and strategic problem solving will be in higher demand. These are skills that can be trained if they are done so regularly and over time. AI-powered tools can help supervisors assess the performance of their team and automate creation and scheduling of bite-size training programs embedded into the agent desktop. These training programs can be scheduled during downtime to enable higher productivity.

### AI-powered real-time guidance and feedback

[AI-powered tools](#) provide fast, accurate coaching for agents navigating complex issues. They can notify supervisors whenever their support is needed and can cue an agent on behavioural changes that can impact the outcome of the interaction, such as practicing empathy or active listening. These tools are a helpful and easy way to integrate ongoing soft skill training.

With emerging workforce models of work from home/work from anywhere (WFH/WFA) and distributed teams, AI-powered coaching can increase agent confidence and engagement, improve consistency, and performance and decrease onboarding and training time.

### Step 3: Align technology to transformation goals

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#### Effortless and seamless digital-first omnichannel

Today, more customers are using digital channels. 87% of service professionals say customers increased their use of digital channels in 2020.<sup>19</sup> But, supporting customers in the channels where they want to be supported is only part of it. 80% of customers expect the same level of service regardless of where they engage.<sup>20</sup> Customer data and interaction history should transfer along with the customer, reducing customer effort and aiding quicker resolution. Other technologies that support cross-channel reduced effort should be considered:

#### Next-generation interaction channels

Give customers multiple ways to connect with you, especially ways that are based on their most used accessory—their mobile device. Your channels beyond voice and email may also include social media (Twitter and Facebook for example) and messaging apps (Messenger, WhatsApp, Signal, etc.).



87% of service professionals say customers increased their use of digital channels in 2020<sup>19</sup>



80% of customers expect the same level of service regardless of where they engage<sup>20</sup>

### Step 3: Align technology to transformation goals

#### Intelligent routing

Rather than prompting customers to choose from among limited voice menu options by pressing phone number keys, natural language processing (NLP) allows customers to speak naturally. Call routing with built-in NLP processing can understand the customer's needs and route them to the correct agent or channel for the quickest response.

#### Biometric authentication

Rather than having to depend on a customer to have account numbers on hand or remember the answers to security questions, [biometric authentication technology](#) can authenticate via a fingerprint on a mobile device, a previously collected voiceprint, or facial recognition. This is a quick secure, and lower customer-effort way to authenticate.



Interested in learning more about understanding and integrating digital channels into the customer journey? Get **“The Innovator’s Guide to the Digital-first Contact Centre.”**

Download



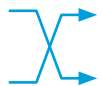
## Step 4: Establish and implement your change plan

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### Establish change plan

A change plan is a framework or working draft of the specific milestones needed to address change. Your initial change plan should be reviewed by stakeholders and is a starting place from which to fill in gaps or “pressure test” your understanding.

It's important to understand that change management is not project management, and within digital transformation there could be several key projects. Determine the projects on which change management is contingent and work with stakeholders to define requirements, assign project managers, set goals, and ensure accountability.



#### Change Management

Applying processes and tools to manage the needs of people as you get from current to desired state.



#### Project Management

Assigning tasks and activities to achieve the project requirements on time and on budget.

Projects within a contact centre transformation plan might include:

- Technology implementation
- Internal communication of change
- Training employees and end-users on new technology
- Systems integration and/or data governance

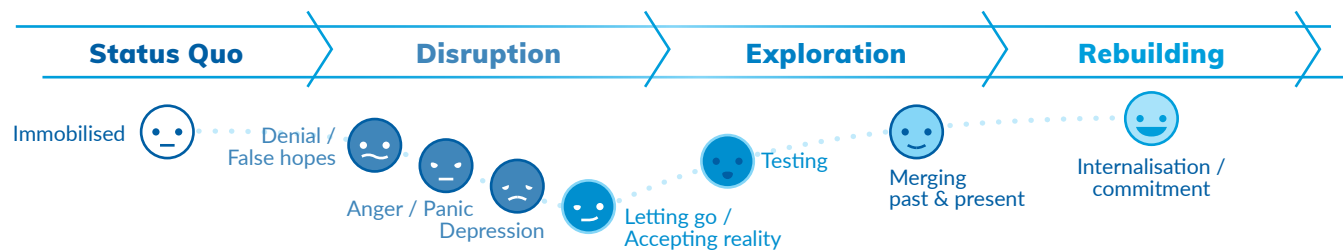
When working with your stakeholders to evaluate the plan, be sure to assess and address budget, time and resource requirements needed to achieve each project.

## Step 4: Establish and implement your change plan

### Manage expectations with transparent communication

One of the greatest keys to success is communication, especially when the stakes are high. You must overcome fear, uncertainty, and doubt. It is important to remember that communication is a two-way street; listening is at least as important as disseminating information.

#### What employees experience during change initiatives<sup>21</sup>



### Training and ongoing coaching for change

Training on how to use and engage with any new tools and technologies and process changes should be included in the change plan.



#### Cybersecurity

It's everyone's job to safeguard the organisation's assets, but public facing employees such as contact centre agents are at high risk for social engineering and phishing.



#### Data protection and privacy

Everyone should be clear on the roles and responsibilities of the organisation—and specifically the contact centre—in privacy protection and regulatory compliance.

## Step 4: Establish and implement your change plan

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In the digital workplace the skills humans possess will become increasingly important. It is incumbent upon organisations to hire and train for these human skills, including:



**“Soft skills,” or interpersonal skills**, such as empathy, patience, and understanding



**Written and verbal communication** appropriate for each channel



**Critical thinking**, that is, using the cues and context to assess or analyse the situation and make logical decisions without letting emotions or personal biases influence the outcome



**Cultural sensitivity**. Certain words, phrases, or references can be problematic or even offensive in other nations and cultures.

Digital tools offer a way to increase coaching and training that is not bound by the time constraints to which managers and supervisors are subject.

## Step 5: Measure and improve

The improvements produced through digital transformation will be evident when the effects are measured in these three key areas in conjunction with each other:

- Customer experience
- Employee experience
- Financial results

Not all the below KPIs for measuring contact centre digital transformation success may be relevant to your organisation. The metrics you choose should track back to your overall goals and show positive movement because of transformation.



### Customer experience

Repeat customers  
Customer churn  
Satisfaction scores  
    Net Promoter® Score (NPS)  
    Customer Satisfaction (CSAT)  
    Customer Effort Score (CES)  
Customer sentiment analytics  
Customer journey analytics



### Employee experience

Turnover/Attrition volume  
Employee Satisfaction (ESAT)  
eNPS (Employee advocacy)  
Employee operational data  
Employee “pulse” surveys



### Financial results

Revenue  
    Repeat buying / upsell  
    Customer Lifetime Value (CLV)  
Cost savings  
    Reduced attrition/rehiring \$  
    Reduced onboarding/training \$  
    Reduced escalations  
    Reduced WFM time  
    Increased forecast accuracy

# Prepare to launch

A contact centre transformation requires strong leadership and proper preparation to succeed. To recap:

- A digital transformation is about new ways of working and new ways of thinking as much as it is about tools and technologies
- Building the narrative is essential to articulate the expected advantages and results
- Elements of the narrative should include time and cost saving changes stemming from technology, such as coaching and WFM
- Build the business case based on the narrative, but include specific measures that will be used to ensure positive change and ROI
- Have a solid communication plan based on the specific needs and preferences of your organisation
- Gain stakeholder buy-in and advocacy by leveraging influencers within the organisation who are champions for your success

If you come away from reading this saying that transformation is bigger than you thought, you are already on the path to success. But, roll your sleeves up with confidence! Because leading a project with such high impact will undoubtedly be a career highlight.



## Digitally transform your contact centre.

**Begin your digital transformation today. Explore how you can transform your business with unified, cloud contact centre software. See how NICE CXone helps you enable better agent and customer experiences and forge relationships that last.**

[Watch demo](#)

# Sources

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With NICE, it's never been easier for organisations of all sizes around the globe to create extraordinary customer experiences while meeting key business metrics. Featuring the world's #1 cloud native customer experience platform, CXone, we're a worldwide leader in AI-powered contact centre software. Over 25,000 organisations in more than 150 countries, including over 85 of the Fortune 100 companies, partner with NICE to transform—and elevate—every customer interaction.



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