The Ultimate CX Agent Guide

Hiring, training, onboarding, and measuring agents in a digital-first world

NICE · CXone

Customers embraced technology to manage all aspects of daily life and set off a digital disruption that forever changed how businesses interact with them. To meet new customer expectations, businesses adopted hybrid models that emphasize connecting with customers in digital channels and face-to-face. Not only do customers want you to be as digital fluent as they are–they expect more personal service, too.

According to Salesforce, as disruptive companies leverage breakthroughs in cloud, mobile, social, and artificial intelligence technology to deliver personalized, valuable, and immediate experiences, customers have more choices than ever. As a result, they grow to expect this superior experience from any business they engage with.[1]

Delivering highly personalized customer experience (CX) in digital channels seems like a contradictory proposition. Instead of connecting with customers in person and face-to-face, we build rapport screen-to-screen—webcams optional, thankfully. In 2020, agents moved from call centers to remote work, and customer preference for digital interaction soared even higher.

85%

87%

85% of CEOs indicate their organizations significantly **accelerated digital transformation** in 2020[2]

87% of service professionals say customers have **increased their use of digital channels**[3]

The switch to digital brought added complexity to call centers overnight. When customers collectively abandoned germy brick and mortars in droves, agent roles expanded far beyond providing last-line-of-defense support. They handled customers who were enraged about a billing error, worried about test results, needed help with an order or fulfillment. And, they did it across more than 25 different voice and digital channels.

Customer behaviors and the channels they use changed. But, what didn't? Expectations.

59%

59% of customers say the pandemic **raised their standards for customer service**[4]

FORTUNATELY, HER TRAINING PREPARED HER FOR DEALING WITH CUSTOMERS OF ALL KINDS
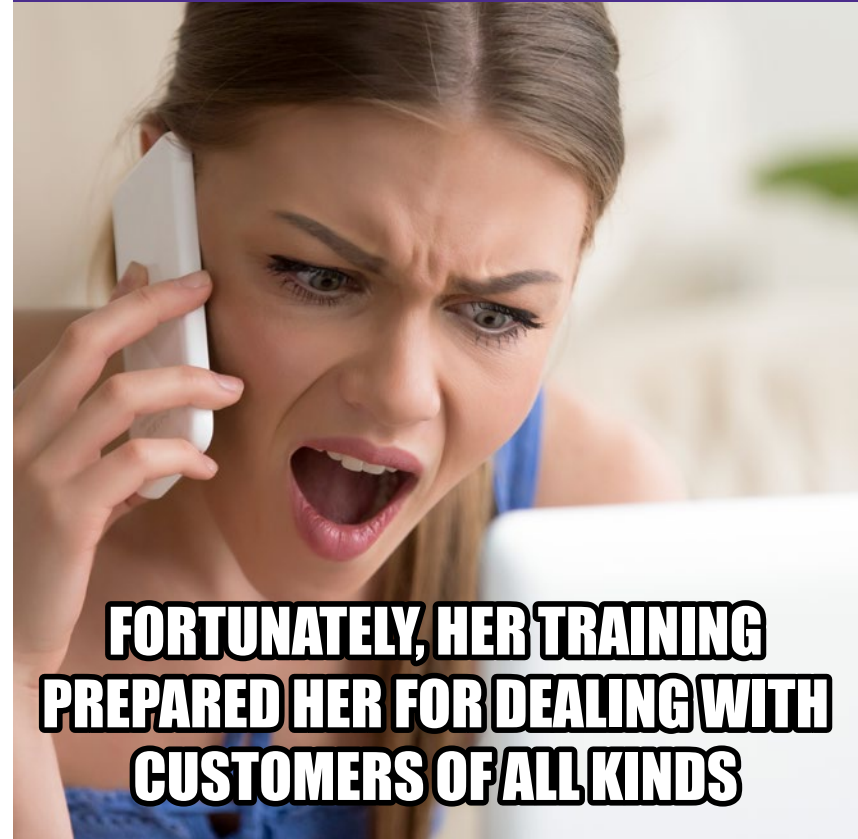
In fact, customers expect the same service levels—or even faster resolution—when using social media, chat, SMS, email, or any other digital channel. Customer expectations for both speed and quality,[5] and expecting to solve complex problems with one agent[6] adds a lot of real-time pressure to agents. Are your agents ready to transform CX in a digital-first business environment? Probably not, no matter what they say to your face.

Digital transformation expanded agent roles. Agents drive sales, assist marketing efforts, support fulfillment, answer questions, liaison between customer and company, and more.

Forrester Consulting research finds that 41% of respondents believe their employees are concerned that their existing digital skills may not match what their job will require in the future, and more than half (53%) said employees are concerned or feel threatened by the growing complexity of tasks they face and will face in the future.[7]

This agent skill shortage—combined with shifts in customer preference for digital channels, expanded agent roles, and remote work—underscores the need to develop new skills and retain developed agents. Your training program (or lack-thereof) can make or break your ability to build personal connections with customers in all channels, but especially in digital channels.

To help you navigate the workforce changes resulting from the digital shift, we've compiled advice from leading customer experience experts, success stories, and the latest research into the ultimate guide. Dig in and prepare to untether your workforce's full potential—your agents deserve it.

How supervisors see me

How customers see me

How I want to be seen

How it's really going

Meet your expert CX coaches

Charlene Li
Founder and Senior Fellow, Altimeter

As founder of the disruptive analyst firm Altimeter and graduate of Harvard Business School, Charlene has cultivated two decades of expertise on digital transformation, leadership, customer experience, and the future of work. She has been named one of the most creative people in business by *Fast Company* and helps organizations disrupt the mold of their industries by providing business leaders with executive support, speaking, training, and advisory and board work. Charlene is also a distinguished author of six books, including the *New York Times* bestseller *Open Leadership*, and co-author of the critically acclaimed book *Groundswell*. Look for her latest book, bestseller *The Disruption Mindset*.

Jeannie Walters
Founder and CEO, Experience Investigators

Jeannie's role as Founder and CEO at Experience Investigators and Certified Customer Experience Professional (CCXP) promotes one mission: To Create Fewer Ruined Days for Customers™. Hundreds of companies, from small businesses to Fortune 500s, have relied on Jeannie's expertise to consult, train, and speak on how to improve customer loyalty and retention, employee engagement, and overall customer experience. Jeannie's writings have appeared in Forbes, CustomerThink, The Future of Customer Engagement and Commerce, and My Customer, as well as university-level textbooks. She was named in the Huffington Post as one of the "Top 100 Most Social Customer Service Pros on Twitter," in the Online Marketing Institute's "Top 20 Digital Marketing Strategists," one of DemandLab's "5 Women Who Are Leading the Charge in B2B CX," and as "One of the Top Customer Experience Influencers to Know" by CXPA.

Addressing the expanded agent role

Customers make purchases, solve problems, and get help through email, live chat, messaging, mobile apps, and social monitoring tools. According to Salesforce, customers turn to an average of nine channels to browse inventory, seek advice, and make purchases.[8]
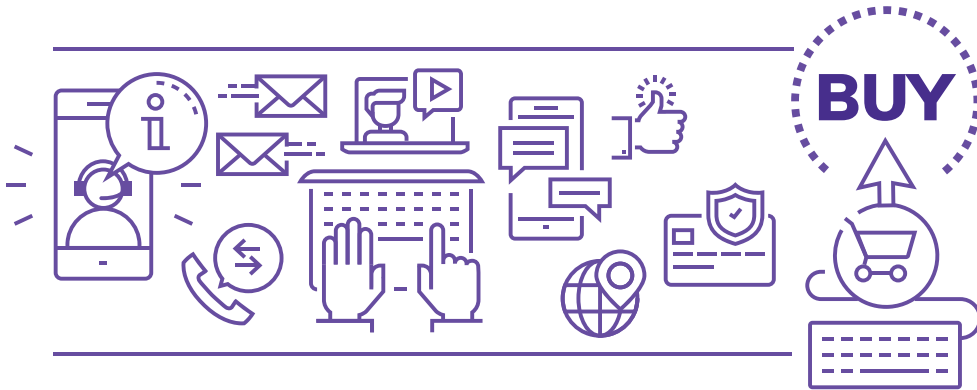
This means agent roles now expand far beyond customer service. The contact center is no longer one touchpoint limited to simple support. Agents are salespeople, marketers, customer service representatives, and more in their expanded roles. And they're often helping multiple customers in multiple channels asynchronously.

Me helping all the customers in all the channels 😫😓😭

The human connection

How do agents build connections with customers in any channel, especially angry ones?

Transferring their calls to another department isn't the answer. Agents need development on clear written and verbal communication skills, social acuity, and emotional intelligence, sometimes called soft skills.

75%

75% of agent's long-term success **depends on people skills**[9]

High performers in call centers or candidates with previous experience in sales, customer service, or marketing probably have emotional intelligence, but if they don't, no worries. You can teach it.

A customer might occasionally misinterpret friction in the journey as an agent who doesn't care. But, contrary to what a customer might think is happening as portrayed by this MEME—agents want to help customers.

WHEN A CUSTOMER CALLS IN SCREAMING

AND I TRANSFER THEM TO ANOTHER DEPARTMENT

In fact, ICMI data shows that helping customers is the No. 1 motivation for agents working in customer service. Training them how to facilitate complex interactions will keep them engaged.

Your interpersonal training needs to cover how to:

- Actively listen to customers
- Express empathy at the right time
- Manage high stress interactions
- Use sales techniques to convert prospects
- Solve common customer problems in all channels

Agents troubleshoot problems in real-time, cross-sell and upsell products, seek information for fast resolution, and build connections with customers in fast-paced business environments. How they manage these interactions drives CX, but has revenue impact, too. Forrester reports on average, when brands deliver a high-quality experience by communicating clearly, their customers are 2.7 times more likely to spend more with them.[10] The ideal workforce isn't just prepared on the technical aspects; to fully support the shift to digital, interpersonal skills are critical to providing great CX.

DO YOU THINK I CARE?

With proper skills training, agents can avoid coming off the wrong way.

Top ten agent traits for successful omnichannel agents[11]

Cosmopolitan
Unique, smart, individuals interested in gaming, network trends, politics, or current events.

Team Player
Problem solvers who enjoy collaborating.

Creative
Experts at balancing standard procedures with doing what's best for the customer.

Courageous
Confident communicators engaging customers in real-time, on a public forum, where everyone is watching.

Patient
Relationship builders who give customers time and attention to build connections.

Resourceful
Solution experts who proactively seek answers by doing extra research.

Empathetic
Great listeners who build rapport with customers.

Respectful
Professionals who don't react negatively no matter what a customer says.

Disciplined
Multitaskers who know how to prioritize and accomplish goals.

Curious
Critical thinkers who enjoy asking questions and seeking answers.

Using data to improve your workforce

With the massive digital shift, pouring over resumes to hire new agents who excel in digital communications might look like the best starting place, but it isn't. CX expert Jeannie Walters, CEO of Experience Investigators, spent more than a decade delivering virtual training from institutions like Georgetown University and LinkedIn Learning, to organizations like SAP Litmos and Zurick. She's got invaluable insight on creating effective agent training and experience programs. One tip she offers for effective customer experience, is to consider the agent experience:

> The employee experience should reflect what we want the customer experience to be.

Jeannie Walters

Founder and CEO, Experience Investigators

"Let's say your goal is reducing customer effort, but you have a process demanding huge effort from employees—that's misalignment."

Walters recommends mapping the customer journey to create an experience strategy as a first step. Using data to map your current customer journey to the ideal state for goal attainment will give you actionable improvements to agent process, technology, and training.

Short surveys can pinpoint customer frustration and gauge satisfaction metrics to track for raising CX levels. By monitoring customer opinions and sentiment, you identify where communication breaks down and what kind of training or coaching to give to your agents.

Tbaytel uses rich data to identify training opportunities

Telecommunications company Tbaytel prioritized CX and knew their on-premise ACD system needed updating to achieve their CX goals. Post-call surveys weren't integrated, and they couldn't customize functionality—agents had to manually transfer customers to the survey platform. The result? Dismal survey completion rates. Low customer data meant Tbaytel management didn't have insight on CX or agent performance. Tbaytel digitally transformed to NICE CXone and implemented an integrated post-call survey solution to automate the survey process, CXone Feedback Management. They now have a healthy survey take-rate and rich CX data supervisors use to measure and coach agents. "Data is captured on our corporate and agent scorecards, and we visually display the team's Post Call Survey (PcS) and Net Promoter Score (NPS) to all our frontline agents in near real-time," Manager, Customer Care Center Cosimo Valente says. "We use CXone Feedback Management for PcS and NPS trigger indicators to identify opportunities for coaching, training, customer relationship management, and process improvements. For example, if a customer is not likely to recommend Tbaytel based on the NPS, we listen to the call and assign an agent to contact the customer to gain more insight. We attempt to address any outstanding concerns and rebuild the relationship whenever possible." Giving agents feedback and coaching based on customer survey data achieves Tbaytel's goals of collecting data about customer service levels and improving agent engagement.

Read the full case study »

Look for areas of friction, high customer effort, and fragmented journeys using data such as customer satisfaction scores (CSAT), sentiment, first call resolution (FCR), and survey results, but also look at agent productivity metrics and agent feedback. In fact, formalizing an agent feedback mechanism like how you regularly survey customers is one way to mirror the experience.

But to effectively create impact, Walters advises closing the feedback loop, so employees see that their suggestions are taken—that their voices are heard. This will keep agents engaged, raise their job satisfaction, and in turn, can reduce attrition and ultimately enhance CX.

In addition to highlighting CX improvements, customer journey mapping will help you analyze and better evaluate your existing workforce. Some ideas that it can help inform include:

- Quantity and type of skills you need to backfill

- Interview questions to ask candidates or data to support promotion decisions

- Identify focus areas or new training programs for agents

- Create an ideal agent profile to support training and hiring decisions

WHEN YOUR COMPANY SHOWS THEY ACTUALLY LISTEN TO YOUR INPUT AND CARE.

Through mapping, you might identify a need to hire agents with Spanish language writing ability or discover your knowledge base needs updating to speed up first call resolution on the most common problems handled in your contact center. Mapping drives hiring decisions and training, too, because you'll hire agents with the right skill set and train them for interactions they'll encounter based on that mapped journey.

Evaluate your workforce

Once you map customer journeys, and figure out the ideal agent, don't assume hiring new agents is the solution:

35% | **35%** of companies are **challenged finding skilled agents**[12]

Hiring begins inside your call center. Your agents already understand customer needs, can identify barriers to first call resolution, and you know their strengths and weaknesses.

Training, with focus on improving soft skills, first call resolution, and communicating in digital channel will not only perfectly shape your workforce into exactly what you need, it supports their professional growth. An accessible training program increases agent confidence and job satisfaction.

Solving agent skill shortage be like:

Customer: My Whatchamacallit won't work 😭

Agent: Hmm, that's a tough one. Have you tried throwing up and then eating the throw up? 🤔

Build a better training program

Deloitte discovered that 53% of executives polled said that "between half and all of their workforce would need to change their skills" over the next three years.[13] Agents agree—55% of agents say they need better training to do their jobs well,[14] so it's alarming that only 9% of contact centers have formal ongoing training.[15]

9% of contact centers have **formal ongoing training**[15]

Delivering training is easier with so many remote options, and that's the direction contact centers are going: Data also shows that more than 60% of contact centers plan to continue increasing their remote work capabilities well into 2021.[16]

With this workforce trend, contact centers need flexible, on-demand training programs suitable for virtual environments. Walters recommends creating learning paths, or a collection of courses grouped together in a way that promotes mastery on one topic or program.

"It's hard to gain mastery over something with one training or one introduction," Walters says. Plus, it lets agents access them whenever they need, giving them control over their own learning and can help improve retention.

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Emergent workforce models impact hiring and training

These days, call centers can be fully remote, on-site, blended, or even gig workers. Most call centers have adopted a blended model that combines remote work with office-based work. Your workforce model impacts how you deliver training.

For instance, 62% of service organizations have brought employees from other departments into service and support roles.[17] These employees might not have customer-facing experience or proficiency at using the technology, which are areas of training you'll need to emphasize.

Consider the increasing use of gig-based agents who aren't full-time employees, but work based on a number of hours or a quantity of interactions. They are fully remote, must get up-to-speed quickly, and require stringent quality management to ensure consistent quality across gig and full-time workers. They're also more transient and can come and go quicker than full-time agents, so you can't use the same approach to train and coach them. Lengthy onboarding, scheduled training, or employee shadowing you'd provide to hybrid agents just won't work for gig workers.

To train a gig worker, you need a templated on-demand training approach. You might implement an incremental skill-based leveling, where gig workers train, take assessments, or other qualifications on lower-impact interactions before up-leveling to the next tier of training and more complex work. Incentivizing the training keeps trained gig workers motivated and engaged.

Ensuring you have the proper training model to support all agents in your workforce is vital to building out a successful training program.

Onboarding Agents: Welcome aboard, digital-style

The typical online onboarding program

Once you've acquired the talent, onboarding takes center stage. A strong onboarding process can result in higher retention and productivity. The best onboarding programs extend throughout the employee's first 90 days—and may even extend out for a full year—to ensure new hires are fully supported as they ramp up to full productivity.[18]

Creating a virtual friendly program ensures it's useful no matter your current or future workforce model.

Virtual friendly agent onboarding tips:
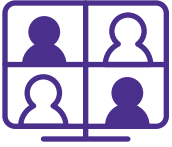
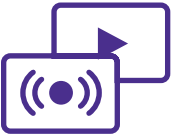Host live video orientation in groups virtually where remote agents can interact with peers, ask questions, share personal tidbits, and make personal connections.

Intermix live sessions with pre-recorded training. Pre-recorded training works best for topics where it might be beneficial to access later so agents can self-service their questions or get refreshers as needed.

Leverage unified communications tools, like Microsoft Teams, to cultivate post-group training breakout sessions and Q&A and where trainers and supervisors conduct daily check-ins on new agents.

Schedule a series of one-on-one video introduction meetings where new hires can meet managers, coworkers, technical support, and employees from around the company to help agents know who to contact and gain a better understanding of the full business.

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Onboarding directly impacts agent retention and productivity, so making it more about people and less about process and paperwork will keep your agents engaged. ICMI research shows 31% of contact centers focus on processes, and only 2% of onboarding time is spent on training high-value skills.[19] To resolve increasingly complex issues, more of onboarding should be spent training agents on people skills like problem solving, multitasking, and emotional intelligence.

2%

2% of onboarding time is spent on **training high-value skills**[19]

Walters agrees: "If we just hire people based on technical skills and that's it, there's this wonderful human element that contact center workers do that will impede carrying out that CX mission," she says.

The onboarding experience is intense. New agents grapple with rapid learning while adjusting to the business culture and job. The first few weeks on the job influence agent retention and job satisfaction,[20] so having a structured onboarding process sets expectations and keeps agents from being overwhelmed.

A CALL CENTER WITH EVERYTHING BUT THE HUMAN TOUCH

Checklist: The six stages of onboarding[21]

1 | **Project management:** Plan the agent journey through onboarding, breaking it down into steps

2 | **Preparation and pre-boarding:** Complete background or reference checks and brief staff who might take part in it, like training buddies

3 | **New hire paperwork:** Provide online to reduce errors and save time. If benefits packages are shared in advance, it makes benefits selection process much more convenient for agents

4 | **New employee orientation:** Create a schedule including breaks and Q&A so they can give feedback. Provide that agenda in writing so new hires know what to expect on the first day. Make sure you tell them how their role aligns with company goals and what they need to know about the work environment and business culture

5 | **Employee training:** Deliver training on processes, systems, and high-value skills like problem-solving through bite-size learning and microlearning in visual and written formats so learning is tailored to each agent's learning style

6 | **Productivity and performance:** Measure new hire performance to see where training is retained or needs refreshing or how to coach them. Ask them to complete a short survey about the onboarding process, so you can optimize it based on real-time feedback

Onboarding influences agent engagement and retention, which ultimately reduce call center costs. So it's to your benefit to formalize a proper onboarding process.

Get technical

Although you should emphasize the people skills in your onboarding, you do need to make sure your agents are trained and feel comfortable with all the technology and systems they'll use on the job.

Your technical training should cover:

- Workflow and process
- Proper use of systems and technology
- How to search for and evaluate information in customer records
- Basic data analysis and research online
- Communication in digital environments
- Multitasking and organization
- Time management and prioritization
- Common messaging platforms and collaboration tools

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Virtual Shadowing: Learn before your turn

Contact center onboarding often includes "learn before your turn" shadowing where new agents get up to speed by following an experienced agent. With today's technology, you can easily emulate the in-office shadowing process. With tools like Microsoft Teams, Zoom, and Slack, training buddies can chat remotely in real-time. Agent mentors can share screens with new hires in Teams and Zoom, making collaboration and learning easy.

Mock evaluations where new agents can act as the supervisor and evaluate digital customer interactions is another powerful way to get agents up to speed. This exercise has many benefits beyond teaching them how to respond to common customer interactions. It exposes new agents to what their own evaluations will look like, behaviors needed to achieve first-contact resolution, and the critical performance metrics on which they'll be measured.

Also consider incorporating "ride alongs" where new agents can listen in live or access a library of real-life digital interactions to learn how agents handle typical or hostile interactions and apply empathy.

Through virtual-friendly onboarding, ongoing knowledge checks, and good communication, you can successfully train agents you've never seen in person.

Angry customer: Your product is more disappointing than an unsalted pretzel.

Seasoned agent: I completely understand your frustration. I also find unsalted pretzels extremely disappointing.

Me in listen-only mode:

Everboarding:
Beyond one-and-done training

Training is a journey, not a destination, but that's not the typical approach in call centers.

50% of agents receive
<2 hours of ongoing training
per month after onboarding[22]

Ongoing training, or everboarding, is a business strategy based on learning science. It acknowledges that people need exposure to content multiple times to retain it, and one-time training is ineffective. When delivered through a single agent interface, everboarding ensures even remote agents feel their contributions are valued and managers are invested in their development.

Agents need performance transparency so they can identify knowledge gaps in their interpersonal skills or system expertise and get feedback to bridge those gaps. Your technology can provide agents with instant updates, visibility to their scorecards, and push coaching packages to address their specific weaknesses. Bite-size, specific training encourages retention, and helps agents meet their KPIs.

Leverage microlearning and bite-size training

Think of microlearning as targeted, brief explanations that fill knowledge or skill gaps. These should focus on one key objective, limited to the most essential aspects needed to achieve the desired outcome. The optimal attention span for an audience is approximately 20 minutes, or slightly less.[23] Take advantage of the 20-minute attention span between calls, during occasional downtime, or after peak interaction hours when they're not distracted. Some call center technology enables you to automate scheduling of bite-size learning during idle time.

Walters offers a great tip: "Instead of serving up monthly training, let agents pick and choose learning based on their individual needs," she says.

But onboarding and ongoing training are only part of your agent's success. Management plays a critical role.

To make everboarding easier, we built you a package of supervisor and agent training programs.

Download the pre-built training now

Your agents want engaging bite-size training, otherwise you're susceptible to this MEME alternative:

ME FIVE MINUTES INTO

AN HOUR-LONG TRAINING SESSION

Bite-size training is effective, short, and not boring!

Hands-on and personalized agent coaching

After onboarding, remote and hybrid agents stay connected when managers and supervisors hold regular evaluation debriefs, coaching sessions, and one-on-one agent-welfare checks. Coaching fosters confidence and boosts performance rates. In fact: 70% of variance in agent engagement scores and motivation stems directly from management.[24]

Managers and supervisors should reinforce how the agent's performance aligns to business goals at every opportunity. A structured and objective framework for coaching sessions centered around how an agent is hitting their unique goals aligned to the business objectives is a great idea.

Through quality management (QM) tools, such as call recording or performance monitoring, you can better identify where agents need improvement on individual and team goals. Delivering personalized, bite-size training immediately keeps their learning on track.

But, because agents feel a lot of pressure to reach KPIs, without the positive reinforcement, sometimes managerial oversight can feel like Big Brother.

No, I don't think you're hovering.

To keep agents feeling nurtured, the dialogue of coaching sessions can be two ways: Supervisors can open the floor for the agent to discuss what's top of mind or to practice mock interactions where the agent wants help. Consistent, objective, and actionable feedback combined with frequent coaching unique to each agent shows the manager is invested in every agent's growth, performance, and well-being.

It's also a good idea to occasionally check in and ask, "How's it going?" via messages in Slack or Teams, and to balance opportunities for improvement with kudos on their hard work. Of course, if you're thinking supervisors barely have enough time to coach as it is, you're right:

7% Customer service leaders only have about "**7%** of their time available for **deep work, like training and coaching**"[25]

However, the right technology can streamline supervisor tasks so they have more time for coaching agents. Using AI to support scheduling and forecasting, supervisors schedule embedded training that enhances agent skills during what would have otherwise been idle time. Agents need this coaching and continuous training or they won't be equipped to achieve your CX goals. And technology makes training way more effective for agents, too.
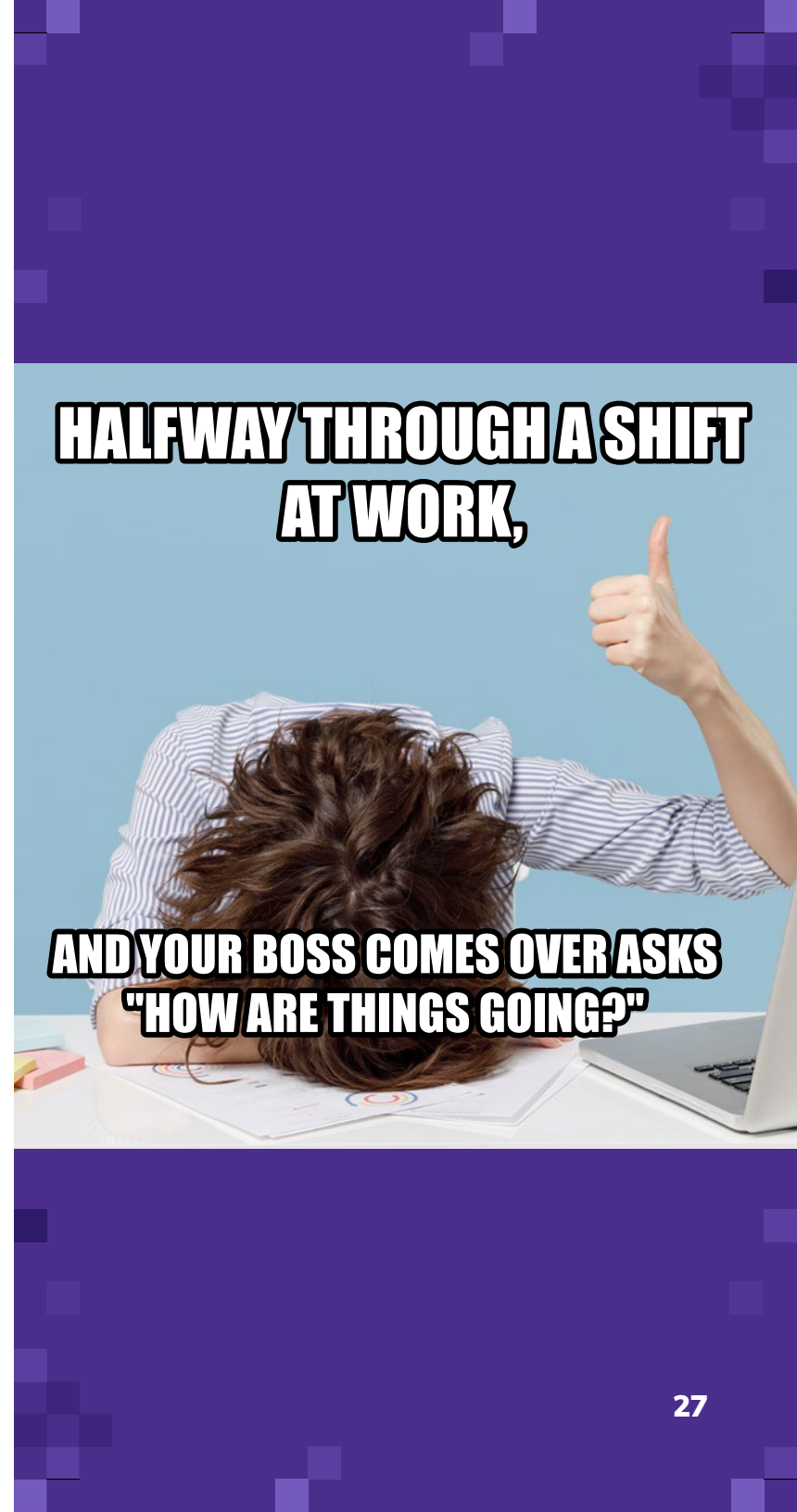
HALFWAY THROUGH A SHIFT AT WORK,

AND YOUR BOSS COMES OVER ASKS "HOW ARE THINGS GOING?"

Technology is your agent's sidekick

Even with all the training in the world, it's important to know that agents can't be everywhere and everything to customers without the right tools.

60% — **60%** of agents **lack tools they need** to deliver meaningful CX[26]

"We've asked these agents who have sometimes only been there a few weeks, 'Learn everything about the product and the company and make sure you can answer all these questions,'" Walters says. "It's not fair! Having these tools is an amazing way to extend and advance their skills."

HIGH CUSTOMER EXPECTATIONS WITH ZERO TECHNOLOGY OR TRAINING.

WHAT COULD GO WRONG?

Integrated technology can help with the heavy lifting. It can:

- Automate scheduling of training to grow agent skills quickly

- Deliver bite-size training to agents based on how they're performing

- Provide context on customer interactions that agents can use to personalize CX and influence first contact resolution

- Offer information the agent needs, even anticipating customer questions so they have answers to possible questions

- Empower agents to find answers on their own through knowledge bases and collaboration tools

- Train them on interpersonal and problem-solving skills that might be hard to train or learn

Delight customers seeking first contact resolution by giving agents the tools they need to solve their problems in real-time.

Empower agents so they know where to go for answers

Speed up internal communication and collaboration in your center using a messaging app like Microsoft Teams if you really want to give CX a boost. Getting help by email takes dog years, but in Teams, you can start a voice or video call, or chat instantly. Meet and chat in real-time to help resolve customer issues faster. Or use the tool to support microlearning, as a feedback mechanism, or for other collaboration.

40%

40% of employees say **digital collaboration platforms are the top factor** for sustainable remote work[27]

Collaboration tools reduce the time to train and onboard new hires, and on average, workers save 15 minutes per day by having features and information sources at their fingertips.[28] Using a shared workspace doesn't just improve CX because agents have better internal communication—it drives worker satisfaction and reduces attrition rates.

Knowledge really is power to deliver great CX

There's always one know-it-all at any business, but for the rest of us, there needs to be a place to find information fast to resolve problems in real-time. 53% of contact centers use a knowledge base, and 38% are planning to add or replace it.[29]

53% | **53%** of contact centers **use a knowledge base**[29]

Agents need training on how to navigate your knowledge base, what to do if they don't find answers, and how to add to it for better knowledge-sharing. And a first-rated knowledge base ensures customers can find the answers themselves, freeing agents from answering routine questions.

PEOPLE KEEP ASKING ME

THINGS THEY CAN GOOGLE THEMSELVES

AI to support agents 24/7

Supervisors can't ride along with every agent interaction like AI can. AI-powered bots with robotic process automation can act as a full-time agent assistant. These bots lower per-interaction and training costs and can improve CX.[30]

Today's bots use natural language processing (NLP) and semantic analysis, not only to figure out what a customer is saying, but also gauge the meaning behind it, like frustration levels. When sensing customer frustration, the agent assistant bots can cue an agent on in-the-moment behavior changes that influence customer satisfaction, which acts as built-in reward reinforcement. AI training is proactive and always present, so agents receive unbiased, effective coaching daily whether they're remote or office based.

Full customer context for personalized interactions

In 2020, Forrester surveyed over 250 contact center leaders to understand what issues are hindering their ability to drive customer satisfaction and improve their bottom line. The findings show 70% of contact centers lack access to relevant customer data at the moment of agent interaction.[31]

> Agents are a critical way to build lasting relationships with customers. And to get this right, customers expect you to know them.

Charlene Li
Founder and Senior Fellow, Altimeter

DO YOU EVEN KNOW ME?

Maybe not "share some hot wings" know them, but at least recognize where they're at in their journey. "Customers want you understand the path they've taken and acknowledge that you know who they are," Li says.

Having that customer data readily available by integrating your CRM gives agents a view of customer information like purchases, recent web pages, interaction history, sentiment, and customer journey information. It gives them the information they need to build a human connection—the stuff technology just can't do. Train your agents on finding and using customer data to build rapport.

Li says when you get it right, customers are absolutely delighted and amazed: "If your agent can say, 'It's great to hear from you. Are you calling about that web search you were doing online?' Customers are blown away," she says.

And agents are equally delighted to provide that level of service.

My customer told me they love me.

So, I guess you could say things are getting pretty serious.
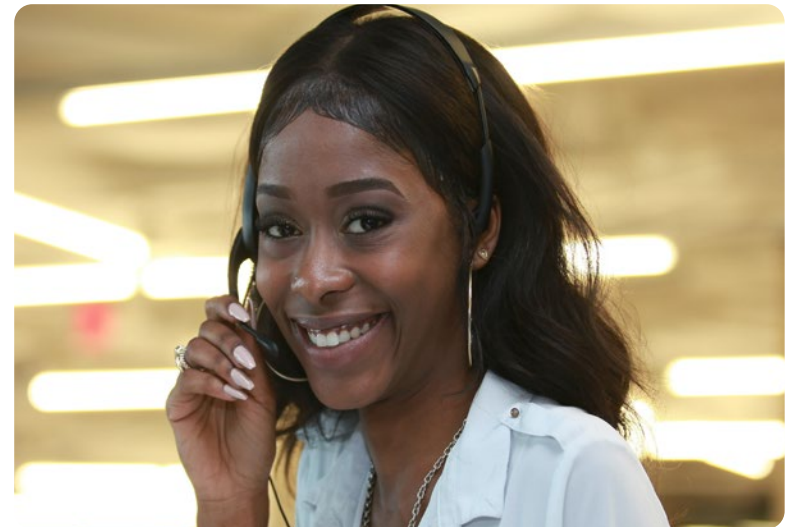
Measurement: Monitoring agent success

So how do you know your agents delight and amaze? You can't oversee every interaction like a bot can, but you can set metrics to track performance and productivity. It's vital to measure your training success by developing KPIs that measure agent performance and customer satisfaction. If you considered customer journeys and expectations, your agents' KPIs will reflect that. Define that ideal customer experience, then build KPIs around it so agents know what to focus on.

Some metrics important for tracking success in today's digital landscape include:

CX Success

Net Promoter Score (NPS)

A measure of a customer's long-term loyalty.

Customer Effort Score (CES)

Results of a survey on how much effort it takes a customer to get their issue resolved indicates customer loyalty.

Customer Satisfaction (CSAT)

Measures the short-term happiness of customers reaction to a specific interaction.

Agent Success

First Contact Resolution (FCR)

Declining rates indicate moments of friction in the customer journey, including when agents don't have the answers and how issues should be addressed.

Occupancy Rate

How much time agents spend with customers—low rates signal low productivity and high rates signal burnout.

Desktop Activity Trends

Track customer metrics against agent actions to understand opportunities to improve training, process, and resource gaps.

KPIs that seemed important before digital transformation might take a backseat now—it's more important that you hire agents skilled at reducing customer frustration more than lowering average handle time if you're focusing on CX. Agents who meet their goals on these new KPIs are building strong customer connections.

But Walters advises not to get hung up on one metric. "There's no such thing as one magic metric," she says. "You really have to figure out what goals you want to achieve, then build metrics around them." Achieving KPIs doesn't just show how well agents are building connections with customers, it grows their skills and confidence.

Aside from the customer metrics, a telltale sign of your success in training is agent feedback. Surveys make agents feel valued but shed light on what improvements you need to make in the onboarding process, software, or training program to better support remote workers.

YOUR BOSS WHEN YOU'RE ABSOLUTELY CRUSHING IT.

Don't be that boss.

Meeting KPIs is fun

Perhaps "making meeting KPIs fun" sounds as easy as nailing a duck's foot to the floor (metaphorically speaking, of course). But it's possible to motivate agents through incentives or gamification to deliver on those new KPIs, and it affects employee engagement. The alignment of roles, responsibilities, and performance with business goals is the No. 1 contributor to high agent engagement levels.[32] Creating KPIs that inspire engagement through healthy competition is easy if you gamify it.

Li says: "People don't want to get paid more. They want to be recognized. They want to feel like they matter, that they make a difference. And we want people to understand our purpose, our strategy, who we're serving, and their personal role in making that strategy happen."

Gamification is applying elements of game playing, such as point scoring and rules of play, to activities like training, meeting sales goals, or team building. In contact centers, you can create games to measure KPIs, like increasing sales by 10%. Divide agents into teams that include remote workers, and they'll have more visibility to management and peers.

When you create friendly competitions for prizes and other rewards through gamification, it's easier to measure agent KPIs. You'll keep them focused on achieving your CX goals by making customer support fun, and they'll get recognized for high performance whether they're remote or in-office workers.

HireRight increases agent engagement by 80%

HireRight, the world's largest provider of pre-employment screening services, was on a mission to improve agent engagement. Their legacy on-premises Avaya system with multiple disparate solutions influenced agent job satisfaction. Agent engagement was at a gloomy 10%. So how did they go from 10 to 80? With CXone Quality Management. "We increased the number of scorecard assessments completed by 141%," Global Quality Supervisor Janie Dellinger says. "We noted improvements in almost every area of agents' overall satisfaction. Job satisfaction improved by 15% and agent engagement jumped 80%!"

HireRight used CXone Performance Management to motivate agents and improve performance using gamification. "We run contests which allow the agents to improve their metrics and receive a reward if they hit specific goals," Janie says. "It has absolutely driven further engagement." Adding gamification drives agent engagement. When tied to their metrics, agents can self-evaluate and course-correct, increasing job satisfaction.

Read the full case study »

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Agent scorecards and self-evaluations

Keeping score is fundamental with gamification, so it's a logical step to use scorecards that allow agents to track their progress in real-time. Scorecards are a tool used for measuring and monitoring quality assurance (QA) and performance metrics for individual agents. These metrics are usually set in advance and align with company goals. Without scorecards to accurately measure performance, contact center managers and agents won't have a clear picture of agent performance or where they need to improve. Online access to scorecards keeps them informed on their progress in real time.

QM tools like scorecards help call centers understand all customer experiences across channels and identify areas for improvement through agent performance and evaluation. With other QM tools like agent-centric evaluation and automated workflows, you reduce evaluator efforts while giving agents access to best-practice examples. Agents get a fair picture of their performance, and that feedback prepares them for more complex customer interactions.

If agents conduct self-assessments on their own interactions along with an evaluator, they gain insight or discover new ways to handle customer contacts that lead to faster resolution. Self-evaluation is a powerful QM coaching tool that leads to delivering consistently great CX.

Undeniable link between CX, omnichannel expertise, and revenue

With customer experience a top business priority, it's critical that contact centers become connectors, friction removers, and places where answers and empathy are readily available.[33] Hiring and developing agents with interpersonal skills necessary for digital, keeping them motivated to meet customer-centric KPIs through gamification and coaching, and retaining them long term by providing tools that empower them to handle complex customer problems doesn't just boost customer satisfaction. It directly impacts revenue.

Contact centers contribute to profits (or don't). Remote channels—voice and digital—have become steadily more crucial in managing customer relationships and generating revenue. Even before the pandemic hit, these customer touchpoints occurred two to four times more frequently than traditional in-person interactions, and the spread continues to widen.[34] In a digitally transformed world, agents with interpersonal skills are in high demand. To keep the best agents, call centers must invest in continuous training that builds on their natural talents and equips them to handle more challenging tasks.

Digital transformation underscores the need for call center agents to deliver consistent, great CX in an omnichannel, dynamic environment. Hiring, training, measuring, and retaining the best agents who are experts in communicating in a digital first marketplace drives customer retention and revenue.

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DIGITAL CUSTOMER CONNECTIONS
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Learn more about how technology enables agent engagement, productivity, and ease of onboarding and everboarding.

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