



The secret to a better CX: an improved agent experience



Customer expectations are evolving. [65% now say](#) they expect customer service to be faster than it was 5 years ago and another 27% say that if they can't use the channel of their choice, it contributes to a negative experience.



Those expectations put pressure on agents to deliver better, faster results across a growing array of channels. Your customer service agents may have the desire and skill to rise to the task, but if they lack the tools required to do so, they'll still struggle to deliver the customer experience (CX) your customers want and deserve.

[One study](#) found that companies that excel at CX have 1.5 times as many engaged employees compared to those who struggle to deliver a positive CX, suggesting a clear link between how empowered your agents feel and the quality of the service they provide. Yet our [CX Benchmark](#) survey found that only 52% of agents feel they have adequate tools to do their job effectively.

What customers want and expect from brands is only growing and the agent experience needs to evolve alongside it.

4 challenges customer service agents face

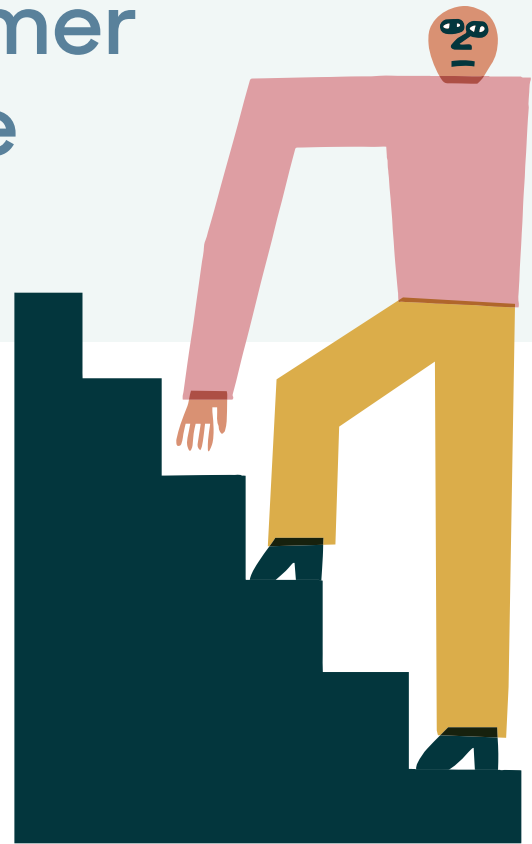
The customer experience gets a lot of attention when it comes to how we talk about business, and rightly so. CX is a key component in success for businesses of all types and sizes. But an important part of delivering exceptional CX gets far less attention: the agent experience.

Customer service agents are on the frontlines of providing the CX that business leaders insist is a top priority. Yet customer service today brings a unique set of challenges that they too often aren't properly equipped to address.

1. The omnichannel customer service experience creates silos

According to Forrester, 95% of customers now use three channels or more in a single customer service interaction. That presents obvious complications for agents. If a ticket starts on a messaging platform with one agent, then moves to a phone call answered by another, the customer will expect the second representative to understand the full context of their current situation and larger relationship with the company.

Making matters worse, we can't predict what new and emerging channels you'll be expected to add to the mix in the coming years. Any partial solutions your



company creates to address omnichannel silos now won't account for the challenge of incorporating future channels. You need to start thinking now about a full solution to unify all your channels— present and future.

2. Customer service processes are often inefficient

Now and then, agents receive queries they can't answer alone. If the process of tracking down the information they need to help a customer is inefficient, it slows everything else down. That especially poses a challenge when they have to go beyond their own department to get answers, such as when a customer issue requires getting data from billing, legal, or even a customer service agent working in a different location.

Agents don't generally have the power to change larger processes around communication and collaboration in the company. Yet they bear the brunt of dealing with any unhappy customers that result from dealing with processes that are needlessly slow and complex. They're held accountable for results, even when the details of achieving those results are out of their hands.

3. Agent workspaces are inflexible.

The easier it is for agents to find the right resources they need to handle a ticket, the more efficient they'll be. The interface of the customer service software they spend their days working in has a key role to play in their experience. When it includes the relevant information they need, they can get answers to customers faster.

But at companies that have a lot of customers and products, the information agents need to have on hand changes all the time. If the workspace always displays the same data and apps, agents still have to spend time digging through resources to find what they need. Without a way to customize workspaces based on contextual needs, agents inevitably waste time.

4. Customer service data is fragmented

Fragmented data is a common consequence of those silos. In theory, companies have enough data to deliver a personalized CX to customers. In practice, that data is often inaccessible at the moment it's needed to make a difference.

Most of us have been on the customer end of this problem. Have you ever had to repeat an explanation of the same problem over and over again to different representatives at a company? That probably meant your customer data wasn't stored in a central location where each rep could access it.



How to empower agents to work better

Although common, these challenges aren't inevitable. Your company can equip your team with better tools and processes for doing their job effectively. It's a matter of choosing to build a stronger agent experience, so they're empowered to do a better job.

STRATEGY #1

Unify conversations across channels

Why it's important

Your customers don't care if you have a different department that provides chat support from the one delivering phone support, or if different agents specialize in different product offerings. They expect a unified experience in their interactions with your brand.

To provide customers with a consistent, conversational experience across channels, your agents need a unified system on their end. They need a quick and easy way to understand who the customer is and what their relationship is with your company each time they're assigned a new ticket. That requires a tool that delivers a 360-view of the customer for every interaction. Agents should be able to see what products a customer has, how long they've been a customer, and the past issues they've experienced.

And with customers increasingly switching between channels in a single customer service interaction, they



need a way to connect the dots between those interactions. If an agent started a ticket over email in California, one who continues it over the phone in Cleveland should be able to quickly and easily access all the information the customer has already provided.

How to do it

At many companies, the need to connect information between different channels, products, and departments can feel like it has crept up on you. Little by little, your company's processes got more complex, your team grew, and you added more tech products to your repertoire. All of which led to silos, which now keep your customer data and communications disconnected.

While tech may seem like part of the problem that caused all this disjointedness, it can also be part of the solution. You need a customer service product that brings all the information you have—from every

channel and source—into one view for your agents.

Having the means to connect the different products you use for each channel is valuable. It's even better if you can give your agents one place they can use different modes of contact. If they don't have to switch between channels themselves each time they reply to a customer, they'll have an easier time providing natural, conversational experiences to customers across channels.

The meal planning service Freshly offers support through several channels—calls, text messaging, livechat, iMessage, and email. To simplify the agent experience and provide better CX for customers, they made the move to [consolidate all their channels into one platform](#).

80% of the team at Freshly is now able to work across multiple support channels, and switch between them as needed. And it's brought much greater efficiency to their processes, resulting in improved response times and impressive customer satisfaction scores (CSATs).

STRATEGY #2

Enable collaboration

Why it's important

The customer service department can work hard to equip agents with the tools and information they need to help customers as efficiently as possible. But even if you have everything within your own department optimized to a tee, you can still face slow response times and upset customers if getting information from others takes too long.

For some tickets, agents will inevitably have to turn to outside departments to resolve the issue. If a software customer has problems with how a product feature is working, agents have to turn to the product department to get it fixed. When customers have a question about shipping times, an agent may need to check with the warehouse to get intel on a package's

status. If agents don't have a good, streamlined process for reaching out to other departments, it hurts efficiency and can lead to longer response times.

The problem is exacerbated by agents spending their days in a different channel than what contacts in other departments use to communicate. If your agents have to move from their customer service software to a different form of communication every time they reach out to another department, it reduces efficiency.

How to do it

One of the first and easiest ways to make collaboration easier on your agents is to provide them a way to contact employees in outside departments within the same dashboard they use for everything else. If they can get a message out to the product team or warehouse without having to switch to a different channel, it saves them the extra time and effort that toggling between various tabs costs them.

In addition, this makes it easier for agents to keep all the details about a ticket in one place. They don't have to manually add the information the outside contact provided to the customer's ticket if the interaction is already recorded automatically there. While the act of adding that information may only take seconds each time, that time adds up when you have thousands of agents working on hundreds of tickets throughout the year.

The ability to communicate with other departments where they are is another important factor in enabling collaboration. You'll get faster responses if the recipients receive your question in a channel they keep open throughout the day. So while agents benefit from starting the conversation within their helpdesk, it still needs to reach your other contacts in the channel of their choice. Whether that's email, Slack, or another platform, agents should be able to get a message out in the channel their recipient prefers, without having to leave their own dashboard.

STRATEGY #3:**Create custom workspaces based on context****Why it's important**

As your business gets more complicated, finding the right information for the growing list of issues customers get in touch about becomes more challenging. A good customer service product can help you put the most useful information front and center in the interface. But for companies with an array of products and potential customer issues, the information an agent needs to do their job well changes from moment to moment based on the context of a customer's situation.

Any time agents have to go digging to find the answer to a customer problem, it takes time. 25% of Zendesk customers said having to search for information outside of the product led to slow resolution times. In order to work faster, agents need improved accessibility to the right information for each particular ticket that comes in—even as those specific needs change.

**How to do it**

The ideal for efficiency is to automatically deliver agents the exact information they need for every ticket that comes in, right in their main interface. That may sound like an ambitious goal, but with the right tools you can get pretty close.

To start, you need to make sure customers provide the most important details the agent needs to solve the problem from when they first get in touch. Spending time sharing information that isn't relevant to solving the issue doesn't do them or the agent any good, it just creates more work for everybody.

By creating custom ticket forms for all of the main categories of tickets that come in, you can tailor the questions a customer will see based on the type of problem they have. As a result, your agents will only see the information that's helpful to solving the problem, which they can then review and analyze more quickly.

Your agents probably already make good use of macros, creating pre-written answers for all the most common customer problems that come in. But when they have so many macros that finding the right one becomes a time-consuming challenge, you lose some of the efficiency that they were designed to create. If your customer service software can automate the process of recognizing which macros are most likely to be relevant based on the details of the ticket, it can deliver up a shorter list that the agent can quickly skim to spot the right one.

Similarly, savvy agents that use apps to add functionality to their workspace and improve productivity can find it increasingly challenging to access the right app quickly as the list they use grows. But a custom workspace can automatically reduce the number of apps visible at any given time based on the ticket details, so agents don't have to wade through unrelated ones.

STRATEGY #4:**Prioritize customer centricity****Why it's important**

The rise of omnichannel support means that customers frequently have multiple touch points with a company in the course of dealing with one issue. That can mean encountering several agents over a number of hours or days, spanning multiple channels.

At companies that haven't developed customer-centric processes, this can create an all too familiar scenario: customers that have to repeat the same details over and over again. That's a waste of your agents' time, and results in upset customers to boot. But as customer journeys get more complex, preventing the issue becomes more complicated.



Businesses today have enough customer data to deliver personalized experiences that take into account the person's full relationship with the company. Where they too often struggle is in making sure each agent can access all the customer data they need to deliver that personalization. That includes not just the details they've provided about the current ticket, but also useful information like past issues they've had and what other products they've bought from you.

If agents can't tap into the customer's journey, they can't see that information.

How to do it

The moment an agent opens a ticket, they need a way to learn important customer details. The right customer service software makes it easy to store basic customer data like contact information, language, and the products they have. But just as importantly, you want the option to display details of past interactions, any important notes about the customer past agents might have made, and all the details the customer has shared about the current ticket.

In addition, your company probably has a lot of useful customer data that's locked away in other software products you use. Making sure you use a customer service software that enables easy integration between all your products will ensure your agents have access to all the data they need, not just the pieces of it recorded within your customer service software.

That's potentially a lot of information, so your agents also need a way to organize it all so they can view the most important data first. For example, the last five interactions are more useful than those from a

few years ago. And any notes a past agent deemed important about the customer should likely be given priority as well.

Providing truly personal support when customers have a complex relationship with your company depends on having the right customer data, and accessing it in a way that's organized for efficiency. Doing that can make the difference between an angry customer repeating the same information for the 10th time, and a loyal one who constantly feels like your company knows them personally and handles their issues with care.

The agent experience determines the customer experience

Once someone becomes a customer of your company, your agents become one of the main ways they interact with your brand. For many customers, the way your agents do their jobs day by day defines how they see your brand, and plays a key role in their decision to keep buying from your company.

When you empower your agents to work more efficiently, you improve their daily experience by cutting down on wasted time and frustrating tasks. You give them the means to deliver on customer expectations and provide more personal, conversational experiences to your customers. That results in happier employees, who will represent your company better. And it empowers them to deliver faster and more useful answers to your customers.



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