THE DEFINITIVE CHANGE MANAGEMENT GUIDE

Transforming the Modern Contact Center

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Why change? Why now?

Contact centers are facing more challenges than ever in the rapidly changing business environment. And while there is data around every customer and agent interaction, many contact centers are not equipped to easily ingest, interpret, act on, and democratize access to these critical insights to deliver exceptional omnichannel experiences.

For many contact centers, there are still numerous operational limitations, silos, and speedbumps standing in the way of adopting agile best practices, maximizing performance, and optimizing both customer satisfaction and agent engagement.

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For too long, potential top-performing contact centers have been held back by these all too common roadblocks:

01 CHALLENGE

Incomplete or dated customer data

SOLUTION

To keep up with both the competition and changing consumer expectations, today's brands need tools and systems in place to be able to consistently capture, digest, and leverage the wealth of data generated during every customer touchpoint, both solicited and unsolicited and direct and indirect feedback.

Listen ▶ **Analyze** ▶ **Take Action**

With access to these invaluable near real-time insights, organizations can empower their agents to learn, grow, and deliver exceptional omnichannel experiences.

02 CHALLENGE

QA & coaching practices that don't deliver the desired results

SOLUTION

Most QA and coaching tools are built for the old world. Modern QA and coaching solutions are designed to support front-line growth, engagement, and performance, with a focus on enablement and enhancing the customer and agent experience, rather than enforcement.

03 CHALLENGE

Systems that fail to meet today's needs

SOLUTION

Many legacy solutions simply haven't been designed with remote, digital-first teams in mind. This impacts the agent experience, which in turn has a huge impact on the customer experience.

Better Agent Experience = Better Customer Experience

When contact centers can overcome these challenges, they will be positioned to be agile leaders. After all, exceptional omnichannel experience requires enabling and empowering the contact center to share the data across the organization so that changes can be made when and where they matter most.

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01 Charting your path to change

Transforming your contact center for the modern age starts here:

Step 1   **Define Your Why**

Change for change sake isn't productive. That's why it's critical to define your purpose — your reason for change. You need to understand what your team and your overall organization will get out of implementing change.

Consider both the potential costs and value of the changes needed.

Business Benefits of the Agile Contact Center

Reduce

- Agent attrition
- Contact volume
- Average handle time
- ...and more

Enhance

- Customer and agent experience, engagement, and satisfaction
- Agent productivity and performance
- ...and more

Accelerate Digital Transformation

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Step 2   **Gather the Right Information**

Now that you have your why — your reasons pressing for change — it's time to explore what change is needed and across which parts of your company.
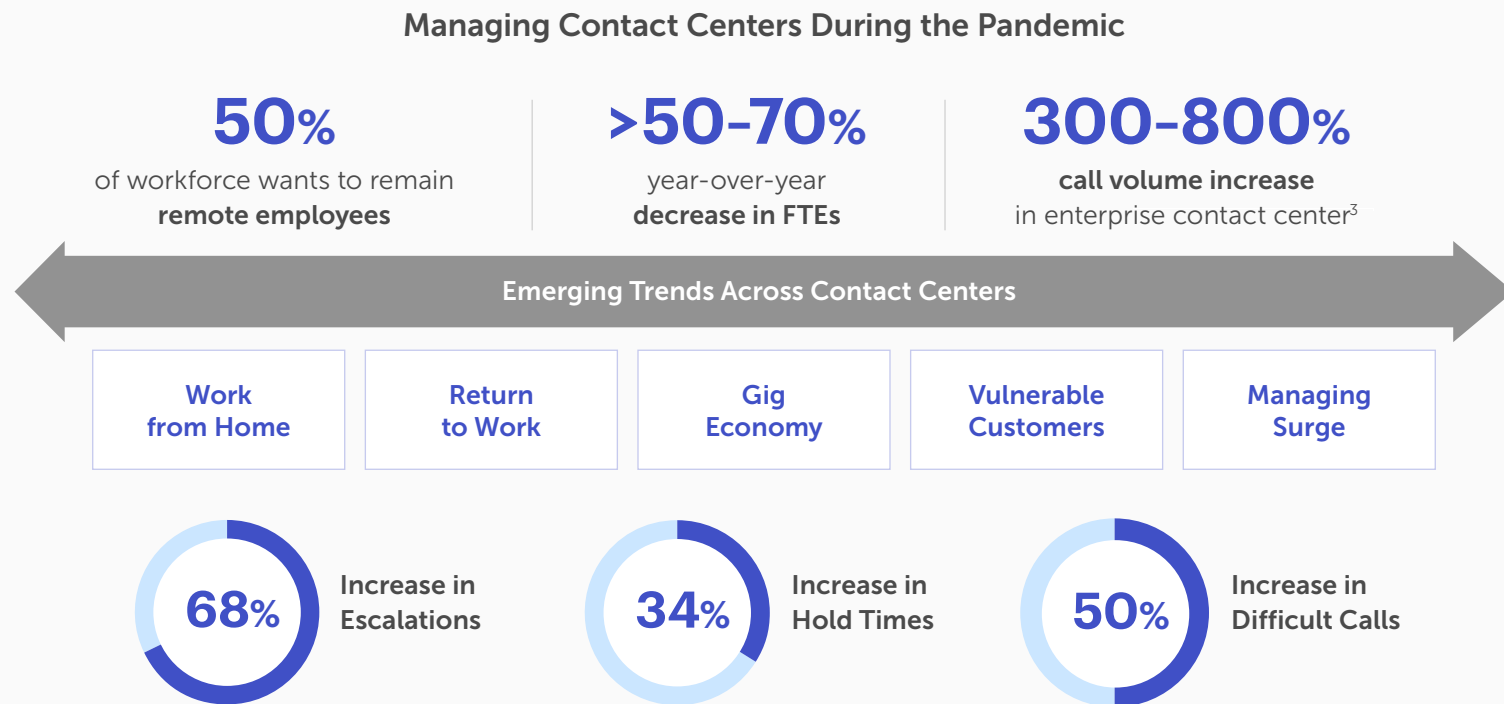
No matter the industry, the top drivers of change within organizations fall into three categories: people, processes, and technology.

Elements of Change — How Do You Start?		
People	**Process**	**Technology**
Key Questions for Internal Reflection		
Who are we? Who do we serve? How do we want to serve them? What's our North Star (building off of our Why from Step 1)?	**What is our culture?** How do we want to make our customers feel? What are the most important factors that make up the culture of our contact center and QA?	**How can we align our people, processes, and technology in support of our priorities?** Who owns each system? Who will be the champion for change? Who needs to be involved in the process of change management?

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Step 3   **Assess Your Current State**

Which teams, platforms, and operational considerations do you need to account for when thinking about making change? Document your key people functions across the contact center, along with your current systems and processes and how they come together in support of your culture, the customers you serve, and achieving your North Star.

The COVID-19 pandemic has significantly shifted the working world and the contact center at its core. Even now, well after the start of the pandemic, more than 50% of the workforce want to remain remote[1], requiring contact centers to formalize long-term strategies for a split workforce with in-office and remote. At the same time, call volume and difficulty have increased exponentially[2] while staffing has decreased. The ever-changing pandemic effects on the workforce dynamic is a critical consideration point in any change management effort.

Managing Contact Centers During the Pandemic

50%
of workforce wants to remain **remote employees**

>50-70%
year-over-year **decrease in FTEs**

300-800%
call volume increase in enterprise contact center[3]

Emerging Trends Across Contact Centers

Work from Home	Return to Work	Gig Economy	Vulnerable Customers	Managing Surge

68% Increase in Escalations

34% Increase in Hold Times

50% Increase in Difficult Calls

[1] https://www.pewresearch.org/social-trends/2020/12/09/how-the-coronavirus-outbreak-has-and-hasnt-changed-the-way-americans-work/

[2] https://www.pindrop.com/blog/flash-report-five-insights-of-covid-19-in-the-contact-center/covid-impact-on-total-call-center-volume/

[3] Pindrop 7/2020, Insights from COVID Contact Center

Step 4   **Garner Support from and Achieve Alignment with Internal Stakeholders**
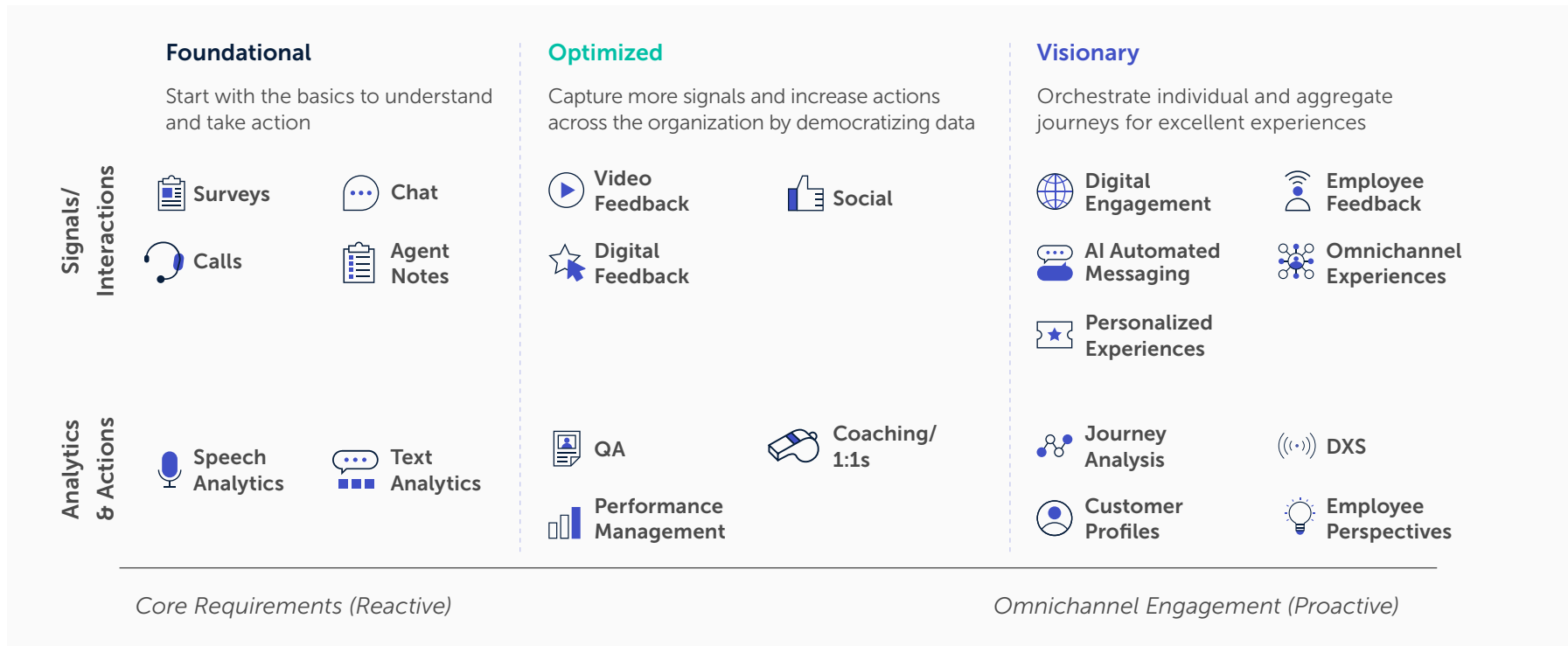
Engage and enlist support across your organization by bringing all of your key team members into the process and be transparent:

- Front-line team members (agents)

- Contact center leads

- Agent advocates

- Executives

- Cross-channel team members (insights, digital, social, employee experience, customer experience, and more)

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Bring together a roadmap for change that benefits your agents, customers, and organization.

	Foundational		Optimized		Visionary	
	Start with the basics to understand and take action		Capture more signals and increase actions across the organization by democratizing data		Orchestrate individual and aggregate journeys for excellent experiences	
Signals/ Interactions	Surveys	Chat	Video Feedback	Social	Digital Engagement	Employee Feedback
	Calls	Agent Notes	Digital Feedback		AI Automated Messaging	Omnichannel Experiences
					Personalized Experiences	
Analytics & Actions	Speech Analytics	Text Analytics	QA	Coaching/ 1:1s	Journey Analysis	DXS
			Performance Management		Customer Profiles	Employee Perspectives

Core Requirements (Reactive) — *Omnichannel Engagement (Proactive)*

The path to advancing your contact center in digital maturity and automation requires strategic and tactical planning. While it's not a race to the finish line — or in this case, the visionary stage pictured above — your commitment to building the proper foundation will play a critical role in the success of your change management efforts. To get started:

Focus on the foundation

Your organization is not alone in making this transition, so choose partners who can highlight and implement cross-industry best practices.

Expand by capturing more signals

The key to really understanding and improving customer and agent experiences is listening to each and every experience.

Move beyond the contact center

Transition from executionary to visionary to create premier omnichannel experiences.

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02 Executing on your vision, with real-world examples

The process of QA as we've known it is flawed.

For one, the manual processes of reviewing customer feedback and interactions make it impossible to go through — and learn from — all of the insights you're receiving from customers at scale to identify trends. The small samples QA teams produce simply can not offer a full picture of your company's performance.

That translates to inconsistent, imprecise coaching, with companies lacking a clear understanding of both the customer and agent experience.

As a result, contact center teams are in the dark, confused, and unable to do what they want to do — best serve their customers.

Siloed technology makes it difficult to understand why customers are calling, chatting, and communicating and even more challenging to get ahead of issues before they arise.

Evolving your contact center efforts for the modern era means that no customer interaction slips through the cracks, every exchange is better than the last, teams are engaged, and the company overall is continuously learning and innovating as a result of near-real time contact center data.

4 Key Competencies of the Modern Contact Center

01   **Listening at Scale**

02   **Analyzing and Predicting the Next Best Move**

03   **Taking the Right Actions**

04   **Ensuring Accountability**

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Step 1   **Capture 100% of customer and agent interactions**

Companies that lack a complete view of the end-to-end customer and agent experiences are not only inadequately set up for agile decision making, they're ill-equipped to know what's influencing the customer and agent experience, identify opportunities for improvement, and implement meaningful changes. Instead, root cause issues — such as unclear policies, website errors, or flawed customer service training programs — go unattended to, and customers and agents experience the same setbacks, frustrations, and disappointments.

Fortunately, modern contact center solutions exist and are being used to enable teams to analyze every customer interaction across channels (inclusive of direct and indirect signals) to bring all of that data together to get a comprehensive customer view.

When one of Medallia's clients, an international telco brand, partnered with Medallia to bring together all of the company's contact center data, support data, web analytics, and digital feedback, the organization was able to uncover underlying website and WiFi errors that were affecting the quality of customer calls and experiences, and, ultimately, the company's ROI. By digging into these challenges, the telco was able to reduce monthly call volume by 5% and save upwards of 160K€ per month.

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Step 2   **Uncover the truth behind every interaction to address issues at scale**

With so many factors that can influence the overall contact center experience, how can you know with certainty what's working as intended and what's potentially having adverse consequences? Leading brands are using advanced analytics and AI to analyze every interaction and create predictive suggested actions to impact interactions for the better. For instance, AI-powered tools are being used in near-real time to:

- Proactively optimize contact center scripts for increased lead conversion

- Unlock emerging trends and sentiment to detect opportunities for growth and improvement

- Anticipate and respond to customer pain points across channels — before they become major concerns

When T-Mobile set in motion a bold new approach to prioritize customer satisfaction over cost as the key indicator of performance, the company's care team pivoted to a new focus on listening intently to customers, acknowledging and deeply understanding their pain points, and setting a goal of resolving customer issues on the first call.

To bring this vision to life, T-Mobile needed a set of tools that would give their team the agility to identify, address, and solve customer pain points as soon as they arise.

By collaborating with Medallia, the company was not only able to capture customer feedback and metrics instantly to solve problems in the moment and implement changes to prevent problems from reoccurring in the future, they were also able to democratize access to these insights across the entire organization — enabling everyone from the frontline to the CEO the chance to hear about customer experiences in near real time. T-Mobile's customer-centric mindset has accelerated the path from customer pain point to solution, and the company was able to deliver $45B in revenue — up 4% year over year — and a 25-point increase in NPS over four years.

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Step 3   **Capitalize on opportunities to save time and drive operational and process efficiencies**

If some of your company's important customer interactions are slipping through the cracks — despite your best efforts and intentions — you're not alone.

Increasingly, best-in-class brands are leveraging tools to automate service recovery workflows, enabling their contact center to make things right with customers immediately after negative experiences. become major concerns

By teaming up with Medallia, Brightstar, the global leader of end-to-end device lifecycle management solutions and the world's fastest growing device protection provider with over 500 agents handling more than 60,000 claims per month, was able to apply Medallia's AI-backed Text Analytics to get to the root cause of issues, automate workflows to get critical insights in the hands of contact center agents and employees who could prioritize and drive change, and deliver an impressive 25% reduction in calls per claim while increasing the company's NPS score by 25 points.

"

By finding deeper insights and understanding the root cause behind claims, we learned that many clients had issues with the length of the document review process. Based on that feedback, we began automating the claim document review process, which has helped us shorten the claim journey by an entire day for most cases.

Brian Powers,
Chief Experience Officer at Brightstar

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Step 4   **Create a culture of continuous improvement that's fully embedded within your organization to drive customer and agent satisfaction**

When agents are motivated, empowered, and engaged, both agent and customer KPIs are primed to soar.

That's why customer-centric and agent-centric organizations are taking these two key actions:

- Finding new ways to recognize and reward agents in the moment by aligning performance reviews with direct customer feedback

- Switching from dated customer service training practices and cumbersome QA approaches and adopting near real-time QA and incorporating this feedback into 1:1 coaching

Stronger QA lead to increases in FCR, cost savings, and QA scores

Since implementing Medallia's Contact Center Suite to use in-the-moment customer interactions to provide meaningful coaching opportunities and streamline the QA process, Revzilla has seen a 15% increase in first-call resolution (FCR), achieved $200K in annual labor savings, and a 3% gain in QA scores.

" Our managers can now run more effective coaching programs and we've seen a measurable uptick in the quality of our service delivery, which enables us to resolve more customer inquiries with fewer staff and drive more revenue.

Patrick Roscoe, Director of Customer Experience at Revzilla

Better agent recognition and rewards result in lower agent attrition rates

By leveraging Medallia's Contact Center Suite to capture near real-time customer feedback to overhaul the company's customer service training and engagement offerings, Swanson Health Products saw a 25% reduction in agent attrition within the first year of using the platform.

" Agents love receiving the recognition and more tailored coaching and this has translated into higher levels of engagement, improved service delivery and a 25% improvement in attrition rates.

Greg German, Customer Service Center Manager at Swanson Health

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03 Optimizing for key business outcomes

Change isn't easy. Transforming the contact center for the modern era takes time and a commitment to continuous iteration and improvement.

By investing in this important effort, however, you will realize tremendous value and impressive results.

Business Benefits

Optimize Customer & Agent Experience

Leverage the power of interactions to attract, onboard, and engage agents to fuel your company's success while building loyalty among customers.

Accelerate Digital Transformation

Use near-real time agent and customer insights to uncover technology gaps, guide investments, and drive adoption and innovation.

Boost Performance & Productivity

Unleash your contact center team's greatest potential with tools that foster innovation, engagement, coaching and continuous learning.

Drive Revenue Growth and Loyalty

Deliver Meaningful Results

Harnessing the power of AI to automate analysis and predicted next steps will free your team up to put rote work aside and focus on putting actionable insights into motion. And leveraging near real-time agent and customer insights will provide you with the intelligence you need to:

- Uncover and address technology gaps
- Guide future tech investments
- Drive further digital adoption and innovation
- Introduce near real-time 1:1 coaching versus manual processes that take days or even weeks to accomplish
- Streamline coaching and training workflows
- Get an analysis of agent feedback to understand and optimize agent satisfaction
- Follow up with at risk customers at scale
- Introduce rewards and recognition programs that motivate agents to self-manage performance and continuously improve

Watch Your KPIs Soar

- Save time
- Increase productivity
- Reduce costs
- Improve agent retention
- Increase customer satisfaction, experience, and loyalty metrics
- Improve your customer effort score

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Choosing the right change management partner to transform your contact center

Empower your contact center to learn from — and improve upon — every interaction to deliver better customer and agent experiences

If there's anything we've learned over this rapid period of changing customer behaviors and expectations coupled with accelerated digital transformation, it's that the contact center experience is integral to optimizing the omnichannel experience. That's why now is the time to commit to implementing changes that have an impact, adopting agile systems and processes that can help enhance both customer and agent outcomes, and investing in modern solutions that meet the needs of your team and, importantly, your customers.

The Medallia Difference

Unleash your contact center team's greatest potential with tools that foster innovation, engagement, coaching, and inclusion

The trusted partner of more than 220+ contact centers worldwide, supporting 19 languages and 21 dialects, and with dozens of integrations with leading contact center technologies, Medallia's Contact Center Suite is purpose built and designed to:

✔ Support any contact center where you are right now with a set of flexible, intuitive, and modern voice of the customer and agent solutions that meet today's needs while also helping organizations grow and evolve over time

✔ Capture 100% of customer and agent interactions

✔ Make it easy for enterprises to take quick and effective action on omnichannel customer and agent feedback by applying the most advanced AI capabilities on the market

✔ Automate alerts so your organization can take the most impactful next steps and close the loop

✔ Drive integrated learning via near real-time coaching to front-line agents

✔ Empower leaders from the C-suite to the front-lines to transform company culture and customer experiences by continuously capturing, understanding, and acting on ongoing agent and customer feedback

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Medallia's Contact Center Suite is an easy-to-use end-to-end solution that breaks down silos to seamlessly gather the right data and proactively surface actionable insights to continuously drive efficiency and improve customer and agent experiences that fuel growth in loyalty, retention, and upsells.
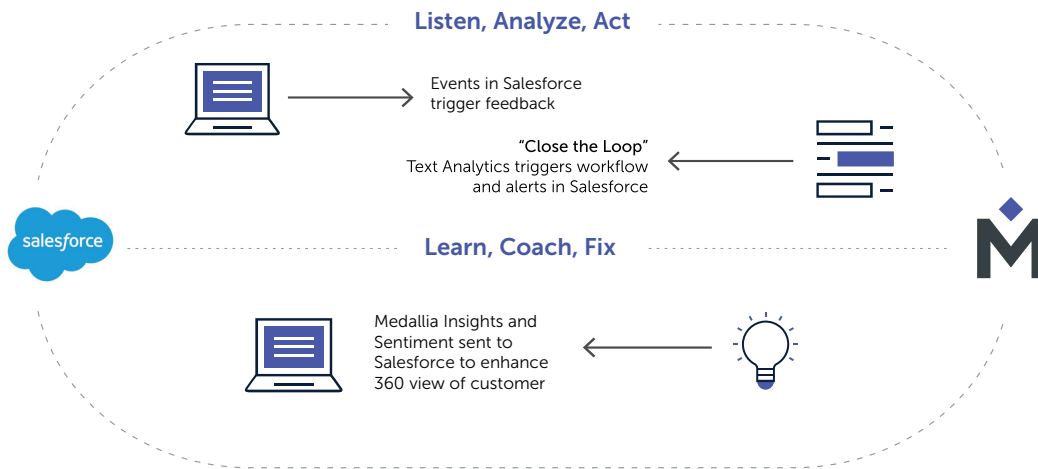
By providing actionable reporting and analysis, Medallia's Contact Center Suite enables best-in-class brands to:

- Identify key drivers, patterns, and insights which can be leveraged to achieve gains in critical metrics, such as average handle time (AHT), first-call resolution (FCR), and more

- Identify cost savings opportunities

- Make broader changes that impact both the customer experience and the operations of the contact center

- Pinpoint opportunities to improve customer effort and reduce churn

- Uncover root causes of underlying issues

Medallia's Contact Center Suite
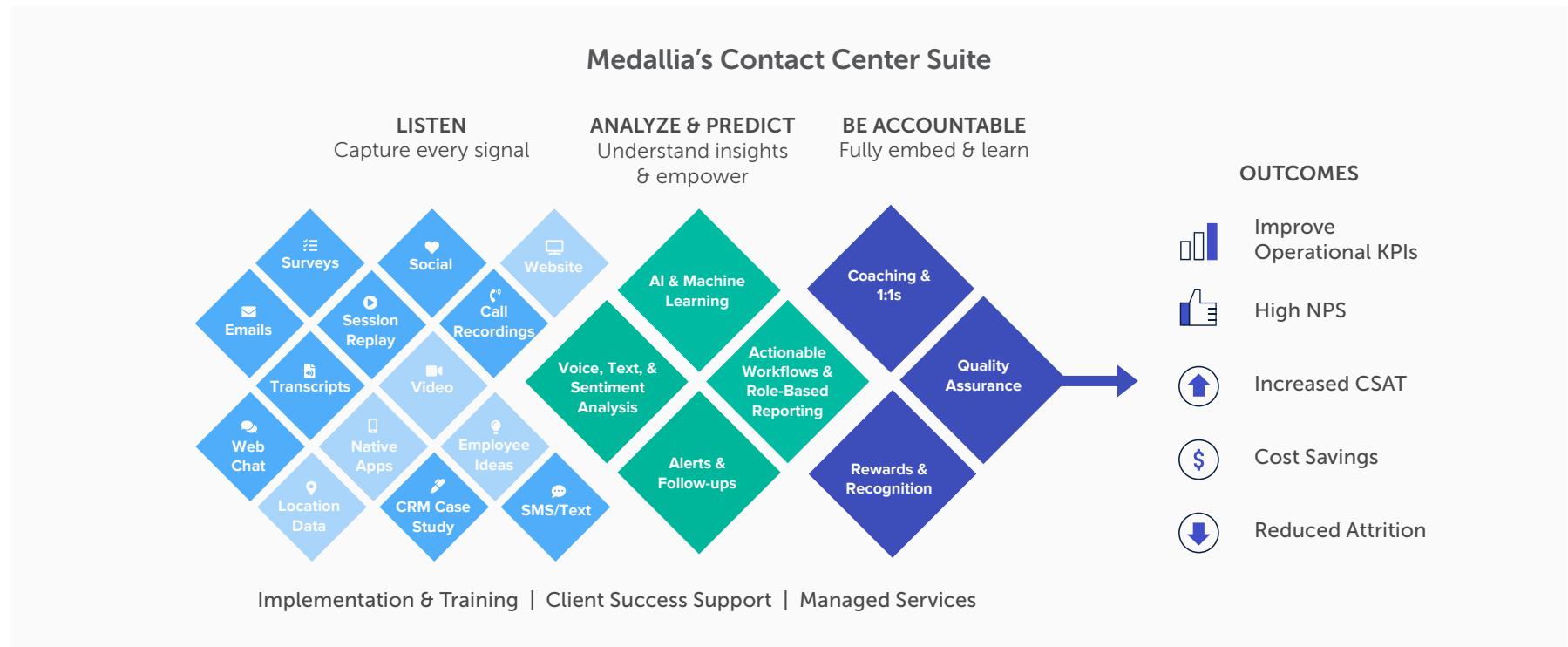
Medallia also partners with leading providers our clients rely on to serve their customers, including Salesforce™. These established and tested integrations make the onboarding process more streamlined than ever before.

Salesforce + Medallia closed loop service = 🙂

Listen, Analyze, Act

Events in Salesforce trigger feedback

"Close the Loop" Text Analytics triggers workflow and alerts in Salesforce

Learn, Coach, Fix

Medallia Insights and Sentiment sent to Salesforce to enhance 360 view of customer

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Contact Medallia Today for a Free Contact Center Change Management Consultation

If you're ready to empower your contact center to enable organization-wide improvements while driving agent performance and customer satisfaction, reach out to our experts to learn about how Medallia's Contact Center Suite can help your team leverage insights from 100% of your customer interactions across channels, delivering gains in loyalty while reducing your costs.

Meet with a Medallia Expert →

Additional Resources

Check out these guides and videos packed with expert advice to help you transform your systems and processes for the future of the contact center.

- **eBook:** Contact Center and Digital, Better Together

- **eBook:** Get Powerful Insights from Every Call

- **Blog:** How to Improve Contact Center Performance Under Pressure

- **Webinar:** Digital and Contact Center: 1+1=3

- **Webinar:** Agents Are People, Too: How E-Commerce Brands Are Revolutionizing Digital CX

About Medallia

Medallia is the pioneer and market leader in Experience Management. Medallia's award-winning SaaS platform, the Medallia Experience Cloud, leads the market in the understanding and management of experience for customers, employees and citizens. Medallia captures experience signals created on daily journeys in person, digital and IoT interactions and applies proprietary AI technology to reveal personalized and predictive insights that can drive action with tremendous business results. Using Medallia Experience Cloud, customers can reduce churn, turn detractors into promoters and buyers and create in-the-moment cross-sell and up-sell opportunities, providing clear and potent returns on investment. www.medallia.com

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