

An eGain White Paper

Clone Your Best Agents

A 7-Step Approach



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In a world where competitive advantage based on products, and even operational efficiencies, has eroded, businesses look at **CUSTOMER ENGAGEMENT** as the **ONLY TRUE DIFFERENTIATOR**. In a recent survey of enterprises, sponsored by eGain, 77% of respondents agreed that **CUSTOMER ENGAGEMENT PLAYED A PRIMARY ROLE IN THEIR OVERALL BUSINESS VALUE PROPOSITION**.

Delivering good service is not easy, though. M&As, product life cycle compression, and outsourcing make it difficult, if not impossible, for customer service organizations to keep their agents up-to-date on best-practice interaction and customer engagement processes, service compliance, contextual sales, and product knowledge.

How can companies provide distinctive customer service and boost sales in this environment? **“CLONING” THE CAPABILITIES OF THE BEST CUSTOMER SERVICE REPRESENTATIVES** across the agent pool—in-house and outsourced—is a powerful approach that can **HELP IMPROVE THE QUALITY AND VALUE OF ALL INTERACTIONS** with customers. Starting with a unique Agent Cloning™ Framework, this paper shows you how to implement a cloning program to take your customer engagement capabilities to new levels.

Agents and the “moment of truth” in customer service

Customer interactions are the new battleground for competitive advantage. Businesses in all sectors are looking to woo, win, and keep customers by delivering memorable experiences at every touchpoint. All their people, process, and technology investments are tested at that moment of truth when the customer interacts with the business. Not surprisingly, they often fail the test.

Customer expectations are very hard to meet in this environment of product and service explosion, frequent mergers and acquisitions, and increasing regulatory oversight. Keeping all agents up-to-date on best-practice interaction and service fulfillment processes, service compliance, contextual sales, and product knowledge is an impossible task for most customer service organizations. It is even harder in virtual or outsourced setups.

Only a few “star” agents seem to cope and flourish in this demanding environment. As a result, service varies from interaction to interaction—the agent’s personality and skill largely determine the value of the interaction, both for the customer as well as the business.

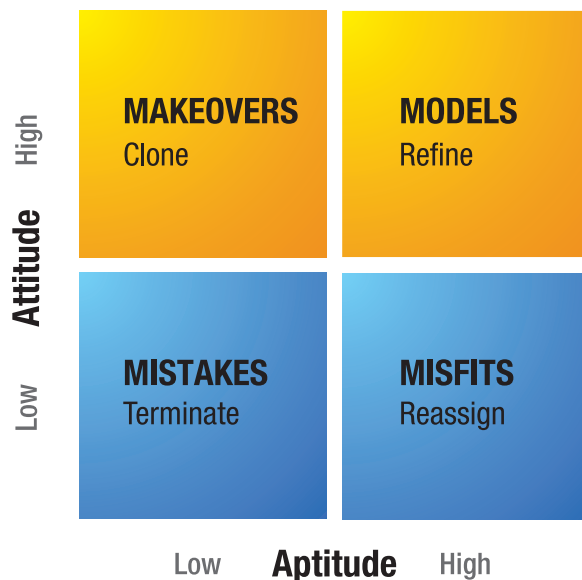
This paper presents **eGAIN’S AGENT CLONING FRAMEWORK**, developed through years of working on innovative customer engagement hubs with some of the world’s leading businesses. This framework is designed to help organizations dramatically improve the quality of their agent pool. Not only will it lead to greater customer retention, it will enable you to increase the return on assets locked in service operations as well as cope with attrition and outsourcing challenges.

Agent Cloning Framework

Most agent pools can be divided into four almost-equal buckets in terms of performance. Usually only about 25% or less of the agent pool falls into the high-performance category. The Agent Cloning Framework helps businesses provide predictably high-quality interactions at every customer touchpoint. It recommends letting go or reassigning the bottom half of the pool, and improving the top half with the help of the seven-step plan described in the next section of this paper.

The framework is based on the notion that attitude is more important than aptitude. Though aptitude is important (for example, experience in sales and customer service, verbal and written communication skills), attitude is a must. Aptitude can be augmented by knowledge and process enablement.

Our 7-step plan can improve the quality of agents who are lacking in aptitude as long as they have the right attitude for interacting with customers.



The eGain Agent Cloning Framework™

We recommend the following approach with the various categories of agents:

MODELS

- ▶ Retain, refine, and reward these high-attitude, high-aptitude agents. However, watch out for and manage “mavericks,” who may succumb to the “know-it-all” syndrome and deviate from the business’s evolving goals and processes.

MAKEOVERS

- ▶ Clone the skills of your “model” agents in this group with the help of the seven-step plan. This group holds great potential for improvement.

MISFITS

- ▶ Reassign these agents to roles that do not require them to interact with customers. As they are lacking in attitude, they are unlikely to ever become “model” agents.

MISTAKES

- ▶ Let go of these low-attitude, low-aptitude agents. They are unlikely to be of help to customers and will only do disservice to your company’s reputation.

The next section of the paper walks you through the seven steps that you can use to ensure your model agents stay that way and your makeover agents evolve into model agents.

Seven steps to cloning your best agents

1: Create your framework by defining “Best Agent DNA”

As you have probably heard before, it’s crucial to begin by defining the goals of your customer service organization and ensuring that they are in line with the goals of the business. A common challenge is to balance focus on customer experience with the need to keep operational costs in control.

Once your goals are in place, identify what makes your best agents “best.” Define, what we like to call, “Best Agent DNA.”

If you have outsourced agents, educate the outsourcer on your cloning framework so that they can develop a sound strategy for best agent replication. Enable them further with the following strategies:

- ▶ Have “models” coach their best agents to create “models” within the outsourcer.
- ▶ Work out what’s best to outsource in order to maximize success. Some of the factors to consider are
 - ▶ **Types of inquiries:** Simple versus complex, time-sensitive versus non-urgent.
 - ▶ **Interaction channels:** Outsourcing written communications may be a safer bet initially.
 - ▶ **Customer value:** It is better to outsource low to medium value customer queries.
 - ▶ **Interaction objectives:** It may be better not to outsource calls involving contextual sales before working out kinks in the process.

2: Create plan, setting goals and time lines

The next step is to pick the right processes and tools to capture and embody the agent DNA you want to clone. Here are some key considerations.

- ▶ What changes are the most important? For example,

- ▶ Improved writing skills.
- ▶ Improved sales skills.
- ▶ Better customer relationship development.
- ▶ What tools can you use to achieve them? For example,
 - ▶ A “living, breathing” knowledge base.
 - ▶ Email workflows.
 - ▶ Guided help during the interaction.
 - ▶ Call scripts.
 - ▶ Online or traditional class-based training.
- ▶ How will you know you have achieved them? Will it be through
 - ▶ Customer satisfaction surveys and ad hoc customer feedback?
 - ▶ Formal performance assessment?
 - ▶ Peer awards?
- ▶ When will you conclude?
 - ▶ When you’ve reached the desired metric.
 - ▶ At a date set by seasonal traffic.

3: Identify models and makeovers

Now you are ready to analyze your agent pool.

Identify the “models”

We recommend a balanced scorecard measurement. Measure front-end factors (e.g., problem complexity, current sat, risk of loss), not just end results (FCR, % escalated, AHT, ASA, etc.). Make sure metrics are aligned with business intent—Wal-Mart metrics and Nordstrom intent are not compatible! Also consider

- ▶ Industry-critical competencies
- ▶ Best customer satisfaction
- ▶ Best technical expertise (for example, engine repair, cell phone diagnosis scenarios)
- ▶ Most familiarity with regulatory process (most important in financial services and health services organizations)

Identify the “makeovers”

These are agents with good attitude that need improvement in aptitude.

4: Capture and embed expertise from “models”

Your goal should be to do away with the need for “20-pound agent brains.” Set up ways to propagate Best Agent DNA “organically” during the course of handling interactions. These include

- ▶ A common, easily available knowledge base to store “expertise.” Set it up such that model agents can contribute to it while handling interactions. Multimodal content access (FAQ, browse, search, guided help) will make it easy for the makeover targets to easily emulate the models.
- ▶ Automated best-practice processes across channels to ensure consistent handling of interactions. It will also free agents to focus on the interaction.

5: Capture and embed regulatory compliance

Keep regulations in mind as you set up tools and processes. Supervisory loop and archiving are especially important considerations. We recommend the use of tools to automate all compliance-related processes.

6: Empower agents with tools and processes

The easiest way to empower agents to solve customer problems and take the right decisions is to provide them with good knowledge management tools.

Support interactions with

- ▶ Links to related material.
- ▶ Directed search.
- ▶ Case-based reasoning.
- ▶ Scripts.

Implement best practices that empower agents.

- ▶ Provide an agent desktop based upon common tasks.
- ▶ Minimize tabbing and number of active applications.
- ▶ Make contact histories available to agents.
- ▶ Maintain customer “memory” across channels.

With advanced tools, provide agents the ability to

- ▶ Know the process and intricacies associated with the current interaction.
- ▶ Know when to go “off script.”
- ▶ See and use opportunities to upsell.

“Broadcasting” information about interesting cases helps to keep agents interested as well as informed.

7: Measure, celebrate, and iterate

Adaptive management through analytics is critical for the success of any initiative.

- ▶ Use “control” and “test” groups for benchmarking.
- ▶ Measure metrics with a meaningful context (e.g., “within 6 months, makeover agents score 20% higher on sat for complex issues”).

Make sure the makeover group knows how much progress it has made. Many agents say that when they do not have feedback, “I have no idea whether I am doing things right.”

Most people thrive on recognition of a job well done. Celebrating success is a simple but important step for your organization and, ultimately, for your customers.

A Final Word

Focus on ROI, not just cost, of your agents. The customer service organization is the ultimate front-end of the business—it is the interaction that customers want. See it as an opportunity to create a memorable experience for the customer, and to treat your agents as your best brand ambassadors.

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