

Reducing Agent Effort Checklist

<input type="checkbox"/>	<p>You have a good understanding of agent effort and regularly measure and monitor it. For tips on how to effectively measure agent effort, check out this blog.</p>
<input type="checkbox"/>	<p>Agent Effort is prioritized at the senior management level. Leaders are highly aware of the difficulties faced by agents.</p>
<input type="checkbox"/>	<p>When an agent receives a call, they see the name of the person who's calling and their account information. This could include things like their account number, or previously purchased products.</p>
<input type="checkbox"/>	<p>If agents have a question, they know where they can find the answer. Agents can find information quickly and easily when they need it.</p>
<input type="checkbox"/>	<p>Your technology is stable and gives agents few, if any problems. Agents don't have to regularly restart applications, and don't experience long loading times with systems.</p>
<input type="checkbox"/>	<p>Your training program gives agents the knowledge and skills they need to do their job effectively. Agents finish training with confidence in their abilities to help customers.</p>
<input type="checkbox"/>	<p>When a call is transferred from one agent to another, notes are carried over with proper channel integration, so agents know what the problem is before saying hello. When each channel operates in isolation, both agents and customers are frustrated.</p>
<input type="checkbox"/>	<p>Communication with agents is a priority, and agents are kept in the loop with important business changes. For example: product updates, pricing changes, or new corporate policies.</p>
<input type="checkbox"/>	<p>Your technology is integrated, and agents don't have to use more than 6 different applications to do their job. Your technology stack may include: a CRM, workflow, email, chat application, telephony, and utility application.</p>
<input type="checkbox"/>	<p>You have one single source of truth, and documents are kept up to date. This means no duplication of data, and only one current version of important documents.</p>
<input type="checkbox"/>	<p>You have a call back number that agents can use so customers don't get frustrated waiting in a long queue. Agents don't have to speak with as many frustrated customers and can get straight to the driver of the call.</p>
<input type="checkbox"/>	<p>You have a quick and simple escalation process for agents that puts customers at ease. Your policies and procedures for escalations aren't arbitrary or hard for agents to deliver.</p>
<input type="checkbox"/>	<p>Agents are multi-skilled and can handle a variety of different call scenarios. Agents are confident and prepared for whatever is thrown their way.</p>
<input type="checkbox"/>	<p>Your new agents have access to the same best practices and processes as your more tenured agents. New employees don't have to find workarounds or shortcuts.</p>
<input type="checkbox"/>	<p>You regularly gather feedback from agents to see how you can further improve. You leverage things like surveys, and face to face conversations with agents.</p>
<input type="checkbox"/>	<p>When agents regularly report they're experiencing a high level of difficulty in one area, management evaluates and improves the workflow. Leadership is removing roadblocks to agent success.</p>

Want to get started reducing agent effort in your contact center?
We can help!

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