

# Reducing Agent Effort Checklist

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

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

[hello@procedureflow.com](mailto:hello@procedureflow.com)

1-888-827-3918

ProcedureFlow

