Agent Performance

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Written by: Brian Cantor

To determine the appropriate performance management framework, organizations must consider the specific demands of their customers, the promise the brand is making to these customers, and the nature of the interactions that will be taking place.

Presented by:

talkdesk

Index:

Contributors:

This CCW Digital Special Report features insights, anecdotes and perspectives from several leading customer management executives and thought leaders.
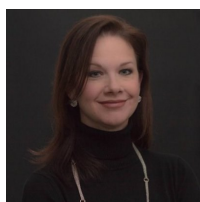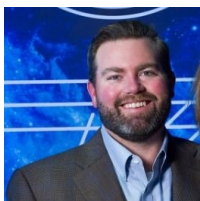
Gadi Shamia
Chief Operating Officer
Talkdesk

Jon Smith
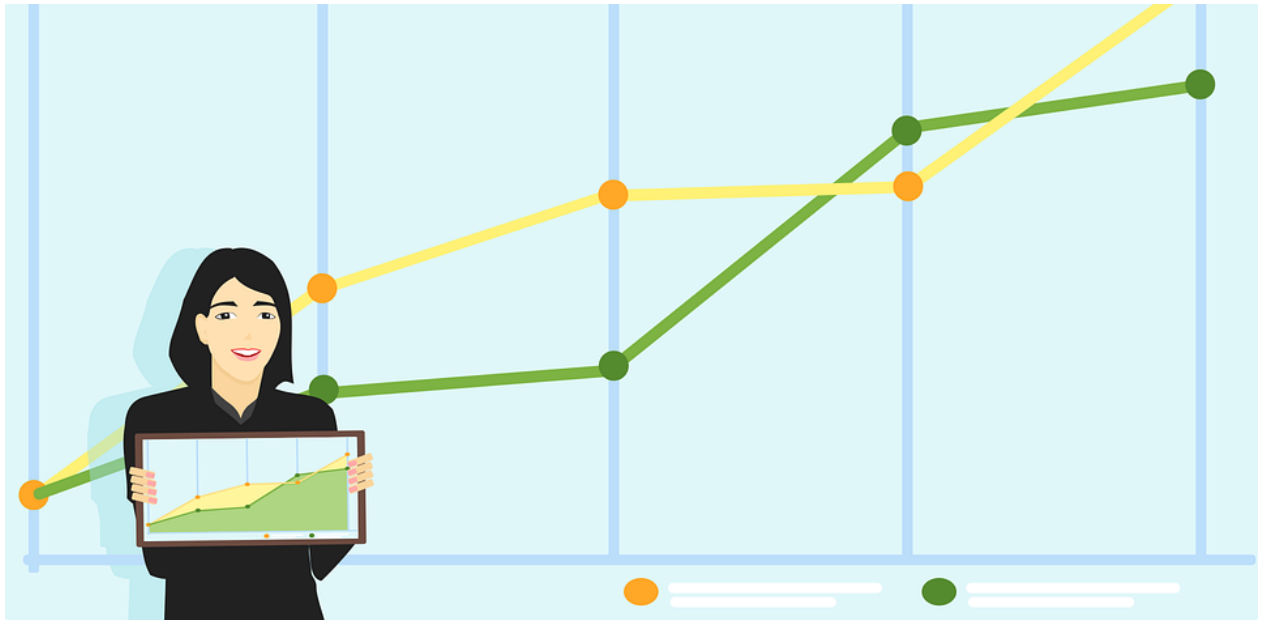VP Customer Support
MailChimp

Kelly Callahan
President and CEO
United Way Association of South Carolina

John McCormick
Director of Sales
Prezi

Contact Center Agent Performance:
No Room for Sacrifices

When thinking about performance, customer management thought leaders have historically focused on the supposed trade-off between "efficiency" and "customer centricity."

A business, in their eyes, could either emphasize fast, transactional interactions or elaborate, emotionally driven conversations. It, essentially, had to choose between quick service and meaningful connections.

Customers are unwilling to make that sacrifice.

They absolutely do expect speedy, frictionless interactions that produce resolutions on the first contact. CCW Digital's recent consumer preferences survey confirms "first contact resolution," "fast resolutions" and "low wait times" as three of the top 5 customer demands.

Customers are not, however, merely looking for curt, impersonal service that "gets the job done." They are also looking for engaging, personalized, high-quality interactions. They are looking for connections.

Friendly, engaging conversations and highly knowledgeable agents also rank as top customer demands.

Customers want to move through the interaction process quickly, but they resent the sense of being "rushed off the phone." They want to feel heard, understood and appreciated throughout the entire customer service journey. They want the business to design experiences that maximize value for customers.

If customers wish to "have their cake and eat it too," businesses must comply. They must design experiences that drive efficiency and customer centricity.

Their approach to agent performance, moreover, must focus on maximizing customer value.

Contrary to contact center convention, businesses should not be choosing between "efficiency metrics" like average handle time and "customer metrics" like Net Promoter Score. In many cases, the two are actually correlated.

Speedy interactions – as long as they do not come at the expense of quality – often increase customer satisfaction, loyalty and advocacy. In doing so, they ultimately lead to more revenue.

To determine the appropriate performance management framework, organizations must consider the specific demands of their customers, the promise the brand is making to these customers, and the nature of the interactions that will be taking place.

After evaluating these factors, the business can then determine the extent to which it should emphasize metrics related to speed, quality, accuracy, channel preference and resolution rate.

Most, ultimately, will play some role in the performance scorecard.

Most, after all, play some role in driving the universal performance priority: forming lucrative, meaningful relationships with customers.

> " Most commonly, however, agent performance is measured by a combination of traditional 'efficiency' metrics plus quality metrics like CSAT and NPS," says Gadi Shamia of Talkdesk. "One certainty is that agents are generally expected to offer more personalized, empathetic customer engagements than in the past."

Now Trending: Agent Performance in an AI-Driven World

For the most part, organizations are still devising their exact strategies for leveraging artificial intelligence.

Many have, however, reached a consensus regarding its likely impact on contact center workflow.

AI will empower self-service platforms to better handle simple, transactional matters. Customers will not need to wait for live agents to discuss basic billing or informational issues; self-service will help them conveniently get the answers they want — on their own terms.

With self-service covering a greater percentage of simple matters, agents will focus more notably on complex, unique, unpredictable issues. They will focus on issues that require critical thinking, emotional nuance and a "human touch."

This new contact center dynamic further emphasizes the need for a "no sacrifices" approach to agent performance.

Since the issues they are handling will be more specific, challenging and personal, agents will need to be able to "think and connect." They will require a greater degree of knowledge, as well as a greater sense of empowerment to make decisions that have not been scripted for them.

They will also need to adapt to customer nuances and emotions. These agents will indeed be asked to *connect* rather than merely serve.

By the same token, they will still have a job to perform. They will still have a full docket of interactions to manage. They, moreover, will still be serving customers who very much care about speed and effort.

Efficiency will still be a paramount concern.

This new contact center normal is not eliminating the need to deliver engagement that is simultaneously quick and complete. If anything, it is heightening the importance of the balance. Agents are being asked to do more – in less time.

To meet this lofty demand, businesses cannot let agents take their eyes off the prize. Businesses cannot suggest that it is permissible (let alone advisable) to sacrifice efficiency in the name of efficacy, or vice versa.

Agent Performance: The Key Challenges

Agent performance is, itself, a major challenge for contact centers.

Even if all the strategic and systemic stars align, there is no guarantee the agents will actually be able to achieve optimal results. Well-coached NFL teams do not always win Super Bowls, well-practiced speakers do not always present inspirational speeches at the podium and empowered contact center agents do not always deliver experiences that satisfy customer and business needs.

There is, however, an absolute guarantee that agents will not perform properly in a suboptimal contact center environment. If the management directives, processes and technologies are not predicated on driving agents to success, the customer experience will absolutely suffer.

By succumbing to some common challenges, today's organizations turn the already difficult task of agent performance into an utterly impossible one.

Unclear and inconsistent metrics:

Employees are fundamentally numbers-driven. They may appreciate the qualitative idea of customer centricity, but they require a quantitative structure to guide their behavior.

They require metrics.

Not simply a way to help agents "track" their behavior, metrics should establish a hierarchy of value. They should reveal what matters to the business, which in turn lets agents know what they must do to achieve success now — and rewards, promotions and opportunities in the future.

Unfortunately, many businesses fail to create a consistent, straightforward metrics framework. Some do not provide agents with transparent access to performance numbers. Some tell agents to focus on connecting with customers but then evaluate them specifically on talk time and call count. Some advocate for customer centricity yet issue bonuses without paying mind to customer-oriented outcomes.

By not creating a clear, consistent performance hierarchy that agents can follow in real-time, businesses do not simply undermine contact center performance. They also create internal frustration, which renders agents unsuitable for dazzling customers in the short-term and unlikely to stay with the business in the long run.

CCW Digital research confirms "unclear metrics" as a top cause of unproductivity and a top agent experience challenge.
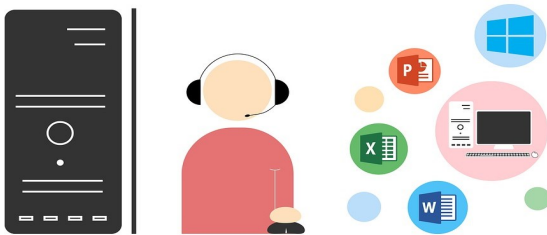
Performance standards in new channels:

Organizations struggled to establish a clear, consistent performance framework in the phone/voice channel.

Imagine the challenge of creating one that encompasses all contact channels!

Indeed, the omnichannel revolution has compounded the challenge of establishing performance standards.

Many organizations are still fleshing out engagement in newer, digital channels. What do customers expect in these channels? To what extent should service levels and response rates mirror those in the conventional voice channel? Is a quick, complete resolution as essential to a Twitter interaction as it is a telephone conversation?

As they work to understand performance expectations within individual channels, organizations also face the challenge of answering the omnichannel question. They must determine universal standards that apply regardless of channel. Customer-minded businesses are also wrestling with establishing metrics for the omnichannel experience itself, including ways to score the ease with which customers can move between channels.

Disintegrated technology:

Before beginning to offer a resolution, the agent requires contextual information about the specific customer and specific issue.

In many organizations, the process of acquiring this information is cumbersome, difficult or even impossible.

" Internal tools can have both positive and negative impacts on agent performance," says Shamia. "The data in these systems is usually critical to helping agents resolve customer issues, but most contact center agents need to access an average of eight disparate systems to resolve customer issues – this has a negative performance impact."

CCW Digital research confirms "disintegrated technology" as the #1 productivity challenge, and it is easy to understand why. If agents need to spend minutes accessing multiple, complicated, unconnected screens just to get context, they have no prayer of delivering an optimal experience for the customer. They will either need to impose an additional, unwanted waiting period on the customer or ask the customer to repeat information. Either way, the customer is being asked to exert more effort while enduring a slower experience.

" Agent performance and CSAT suffer when a customer fails self service, calls the contact center and the agent has no idea who they are or the nature of their problem," adds Shamia. "The customer has to repeat everything again and relives that negative experience, in addition to the frustration of an inefficient solution. Effective omnichannel integration happens when the context of the previous interactions is carried forward to subsequent interactions."

Quickly, yet meaningfully connecting with a customer is difficult enough for agents who have the information they need. It is an impossible task for those who do not.

Lack of knowledge – poor training:

Agent empowerment is the key to performance. Great training is the key to agent empowerment.

Unfortunately, some organizations struggle to deliver the training agents require. They gear training toward basic, generic procedures and scripts, ignoring the human competencies and brand-specific insights that help agents deliver meaningful value. Training cultivates agents who can answer common questions rather than those who can connect with customers.

Always a problem, this issue becomes particularly pronounced amid the new contact center normal. With agent focus shifting to more complex, unpredictable interactions, procedural knowledge is even less useful. Today's agents need to feel comfortable recognizing nuanced customer needs, before thinking critically and creatively about unique resolutions.

Organizations further undermine their training by ignoring the voice of the customer. They train agents on static knowledge, leaving them unable to understand what really matters to customers – and how those preferences are changing over time.

Customers can use self-service tools to access basic, standard information about the company and its products. They expect agents to deliver support that is dynamic and personalized.

The challenge of training goes beyond course material. Training, itself, can be the enemy of performance. Instead of leveraging automated tools and real-time, in-call support, many organizations remain committed to general classroom training. This training, which doesn't even provide agents with custom, nuanced learning, takes agents away from their desks – and from the customers they are tasked with satisfying.

CCW Digital research identifies training and coaching as the top investment focuses for workforce management, performance and the agent experience. Organizations clearly understand the importance of training, but if they do not correct the training they are offering, their investments will be for naught.

Lack of knowledge – poor accessibility:

Even the best training has its limitations. Agents will inevitably encounter questions for which they do not automatically know the answer.

They will subsequently turn to the company knowledgebase for assistance. The ease of navigating that knowledgebase has direct ramifications for performance.

Unfortunately, those ramifications are often of the negative variety. Company knowledgebases are cumbersome and unintuitive, requiring agents to exert considerable effort – and waste considerable time – acquiring information customers expect immediately.

Worse, they are not connected with the call desktop, analytics suite or CRM solution. They neither have the ability to "learn" based on past interactions nor guide agents based on the current interaction. The data remains static and impersonal at best and incorrect and out-of-date at worst.

Performance suffers as a result. Agents – even personable ones who can think on their feet – deliver experiences that are slower, less accurate and less personal than customers are demanding.

Poor workflow management:

Agents are at their most valuable when conversing – and connecting – with customers. It is a task humans continue to do better than machines. It is also a task that continues to yield tremendous value for the business.

In an optimized contact center environment, agents would spend most (if not all) of their time in nuanced, deep, "human" interactions with customers. It would yield the greatest ROI for the business, while also driving the greatest possible degree of agent satisfaction. Agents would in turn be happier, stay longer, perform better and ultimately produce a stronger contact center function.
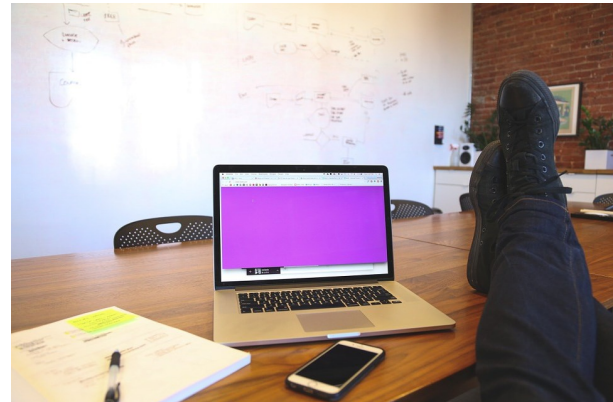
Few businesses actually create this ideal environment. They instead assign agents mundane tasks, including answering transactional calls, handling post-call work, performing data entry and participating in classroom training. Suboptimal scheduling compounds this matter, as agents sometimes spend time doing *nothing*.

By increasingly handling transactional matters, AI-driven self-service is helping to a degree. The interactions agents manage will be of a more nuanced, productive, valuable variety.

Unfortunately, reducing transactional call volume only addresses part of the issue. Organizations will still need to account for the menial, non-interaction tasks on which agents are currently spending time.

If not, agents will continue to perform below their potential.

Ineffective routing:

Certain agents are better-suited for certain customers and issues.

Many organizations fail to recognize – and take advantage of – this reality. They route calls based on random (or very rudimentary) rules, doing nothing to ensure "fitness" between the customer and agent.

Performance suffers as a result.

Agents are unable to make the best possible connections with customers. They also lack the knowledge to deliver the fastest, most worthwhile resolutions. Agents spend more time on each call and do not even deliver significant value for the customer.

It is not enough to emphasize customer centricity as an objective. A performance-centric company leverages processes and technology to foster the best possible connections between agents and customers.

Agent Performance: The Key Opportunities

The stakes of the contact center are significant, which means the cost of succumbing to the aforementioned challenges is exorbitant.

It also means the value of improving performance is substantial.

By allowing issues like poor training, unclear metrics and disconnected systems to fester, the organization stands to undermine its customer experience strategy. It will anger customers, frustrate agents and essentially hand competitors the key to victory.

By seizing opportunities to improve performance, the contact center turns those points into positive ones. It will satisfy customers, empower agents and outperform competitors.

Numerous such opportunities exist.

Establish the "why," Let metrics tell you "how":

Metrics are not simply valuable for "scoring" performance. They are useful in uncovering needs, trends and opportunities. They identify the behaviors and patterns that drive success.

They, quite simply, help the business contextualize performance.

Organizations must take advantage of this reality in their contact centers. They should use metrics to not only assess current results but identify the practices that are helping or hindering those results. They should emphasize correlations.

Rather than relying on "average handle time" due to the assumption that speed matters, customer-centric organizations will begin by focusing on a desired outcome like CSAT. They will condition agents to view this metric (CSAT or similar) as the ultimate barometer of their job performance.

Due to transparent reporting, agents will always know how well their work (as individuals and as part of the company) is translating into customer happiness.

The business will, moreover, make a full slate of intermediary metrics (AHT, ASA, FCR, accuracy rate, call back rate, etc) available in a dashboard (if not a public, company-wide leaderboard). Agents and supervisors will have a clear, real-time window into how their performance in these areas compares to other agents.

More importantly, they will see how their performance in these areas translates into big picture results and feedback.

If an agent with high average handle time also has low marks from customers, the agent is taking too long to solve problems. The agent will understand the problem, and the supervisors and trainers can help provide a remedy.

Beyond measuring and reporting based on outcomes, customer-centric organizations ensure these key metrics inform incentives and promotions.

> **"**
> Call center agents have traditionally been at the very low end of the corporate employee pay scale," acknowledges Shamia. "To motivate and empower agents, companies should tie compensation and incentives to performance metrics – especially related to CSAT."

Spotlight: The United Way of South Carolina

"We measure our average handle time, our SLA, our abandonment rate," says Kelly Callahan Cruise of United Way. "Further, we also want to make sure that we're answering enough calls. If we're not answering them efficiently, we're missing some people that [we want to be helping].

"What we also measure is a little bit more complex. We measure how we've been able to improve a caller's life. Par t of our measurement of success is when we find out that a caller has put food on the table or is out of homelessness and has moved into transitional housing. That's important to us.

"Then, even further, what also measures our success is the amount of data that we're able to gather from these different channels that [community agencies can utilize] when they're seeking grants or resources to help meet needs in the community."

Training in four questions:

In theory, training is the gateway to great performance. In practice, it is one of the biggest performance bottlenecks. Organizations are offering agents the wrong training, and the customer experience is suffering as a result.

To revamp their training strategies, organizations should build an agent development model in conjunction with four key questions:

1. What does it take to be a good contact center agent in today's environment?

This question considers the notion of connecting with customers without sacrificing efficiency. It pays attention to ideas like emotional nuance and empathy, devising creative and custom solutions, spotting trends in customer sentiment, considering opportunities for up-sells, and interacting with customers across channels.

2. What does a good contact center agent need to know about *our* business?

Core product and procedural knowledge may not be the heart of customer centricity, but it is still a necessary part of the learning process. The key is to present this information as an "asset" to help fundamentally customer-centric agents feel more comfortable engaging. It should not be a "script" that mandates exactly what they must say.

This question underscores that dynamic. It views knowledge as an enhancement, rather than as a substitute, for the agent's "people skills."

3. What does a good contact center agent need to know about *our* customers?

In a customer contact context, knowledge is about more than familiarity with the company and its processes, products and systems. It is also about a legitimate understanding of its customers.

Great training programs rely on the voice of the customer. They leverage insight from customer feedback, analytics and buying behavior to ensure agents know who customers are and what they really want.

They also emphasize adaptation. The agent should be able to detect a specific customer's demands – and tailor the experience accordingly.

"

It comes down to understanding what the customer needs, and making a conscious effort to train our agents to look at an issue as a customer on the other side versus just a ticket," said Jon Smith of MailChimp during CCW Online this year.

(3. continued)

" We have metrics that we ask our agents to adhere to, but we also allow them to utilize their experience to determine when a quick call is needed and when it isn't," adds Callahan Cruise.

She notes that United Way agents are trained to "move through transactional calls in a nimble way to [answer the questions] and get the customer off the phone in a quick manner."

With other calls, agents know to "put the brakes on -- this is a crisis call, this is something that is going to take a while."

4. Can we automate re-training?

Customer demands, customer profiles, products, engagement platforms and brand missions all change over time. As the ultimate ambassadors for businesses, agents must constantly adapt.

The problem is that classroom re-training is the enemy of productivity.

Organizations must therefore ponder efficient, if not completely automated, options for re-training.

Achieve Complete Integration:
When advocating for integration, some thought leaders suffer from tunnel vision. They focus on integrating channels or departments or contact center systems.

To truly elevate performance, businesses must ensure *everything* is integrated.

The organization must commit to a completely omnichannel experience – on the front-end and back-end. The customers should be able to move seamlessly between channels, and the business must be able to access real-time data about that customer in all channels.

Systems, particularly the CRM, knowledgebase and contact center platform, must also be integrated. Upon "receiving" an inbound interaction, the agent should instantly have precise details about the specific customer, the customer's most recent interactions, the actual (or at least likely) issue, and knowledge about how that problem is solved.

> "
>
> Talkdesk Callbar drives productivity because there's no screen switching - all the contextual information is on one screen," says John McCormick of Prezi.

This systemic integration, it is important to note, should not merely occur within certain departments or functions. In the era of omnichannel customer centricity, interdepartmental systems should also be integrated. The product team should have instant access to customer feedback and support inquiries. The sales team should know exactly what the marketing team is promoting. The contact center should know what business initiatives could yield increases (or changes) in call volume.

This sweeping degree of integration will impact performance on two fronts. It will eliminate the time agents "waste" collecting data and information, thus automatically improving speed and efficiency. By giving agents access to better information, it will also empower them to create more valuable experiences for customers.

Make Routing Intelligent:

"Making connections" is a fundamental goal when engaging with customers.

Routing can play an instrumental role in creating these connections.

All organizations must create an *omnichannel* routing chain. Customers should be able to instantly switch to a new channel, and agents should have a clear window into who is switching (and why they are switching).

Where relevant, they should also leverage issue-based or personality-based routing.

Issue-based routing connects customers to agents best-suited for their specific problems. It eliminates the "switchboard agent" role and ensures every moment spent conversing with an agent brings the customer closer to a resolution.

Personality-based routing connects customers to agents best-suited for their specific personality types (or emotional state). With self-service increasingly resolving transactional "problems," this idea of a personal connection becomes more relevant. Customers are seeking agents who *understand* them.

Initiatives related to training and systems give agents the competencies and tools they need to perform. Intelligent routing puts agents in scenarios in which they are most likely to perform well.

Embrace CX Automation:

As 2018 arrives, "automation" is quickly becoming a contact center cliché.

Clichés often become clichés for a reason, and "automation" is no exception.

Performance-minded organizations are leveraging automation on the front-end and back-end. They are using it to empower engagement, specifically by creating self-service tools that are more intuitive, adaptive and helpful.

They are using it to create better routing rules.

They are deploying it to optimize scheduling, particularly as contact centers wrestle with volume management in an era of multiple contact channels and at-home agents.

They are implementing it to handle post-call work, including CRM data entry and feedback analysis.

They are adopting it for training purposes, including developing re-training courses and improving knowledgebase navigation.

They are also using it to "coach" agents during calls, offering recommended responses and guidance during points of difficulty.

> " Any time rote tasks can be offloaded from the agent and automated, the result will be higher agent productivity," says Shamia.

By promoting efficiency in some situations, automation opens the door to more emotional interactions in others.

Improve Workspace Design:

"Happy agents = happy customers. Optimized workspaces create happy agents.

By leveraging open seating, noise management solutions and modern furniture, contact centers create warmer environments for agents. These agents feel more content at work and thus represent more ideal "ambassadors" during interactions with customers.

" Contact center environments should be bright, fun places to work, not drab sweatshops where agents are packed like sardines," declares Shamia.

Not simply an exercise in "happiness," flexible work environments also have a more direct, practical benefit. They offer space for collaboration, which creates better opportunities for sharing feedback and knowledge.

Innovative Contact Center Metrics: A "Cheat Sheet"

Make no mistake; contact center performance is ultimately defined by core "outcomes" like customer satisfaction, loyalty and revenue.

Intermediary metrics, however, play an immensely important role in diagnosing performance, identifying challenges and un-covering opportunities. They reveal "why" outcomes are where they are now — and what steps a business can take to achieve improvement down the road.

Traditional metrics like average handle time and first contact resolution are undoubtedly important in this quest. They accurately reflect and measure much of the work an agent handles on a day-to-day process.

They, accordingly, help identify opportunities to improve agent performance — and drive better overall business outcomes.

They do not necessarily tell the full story. And insofar as they pre-date recent developments within the customer contact landscape, they do not account for the nuances of the modern customer experience function.

Conventional contact center metrics may say a lot about a typical contact center agent, but they do not chronicle every facet of performance in today's age of omnichannel customer centricity.

Forward-thinking organizations are thus look beyond traditional metrics when assessing performance. They are looking for new scoring systems that better reflect the reality of engaging customers in today's landscape.

In the spirit of elevating agent performance and boosting customer centricity, CCW Digital has created a "cheat sheet" of innovative, if not "radical" metrics for monitoring contact center performance:

Screens to profile:

How many systems/screens must an agent access before gaining complete knowledge about who is calling, why they are calling, why they have called previously and what they likely want right now? (Alternative: "Seconds to profile")

Screens to knowledge:

Once the customer has asked a question, how many knowledgebase screens must the agent manually navigate in order to acquire the right information? This can be used as an assessment of the agent (should they already know the answer) as well as of the system (is it helpful enough). (Alternative: "Seconds to knowledge," "Questions to knowledge")

Scheduling Optimization Quotient:

Divide the average time an agent spends between calls by the time an agent is available for new calls.

Personalization Meter:

A measurement of the extent to which the agent is "personalizing" interactions. This can be issued as a "grade" (following management's qualitative review) or as a score (by using analytics to compare overlap between interactions).

Agent Preference Rating:

How many channels/touchpoints did a customer access before reaching the live agent?

Agent Redundancy Rating:

What percentage of an agent's calls could/should be handled in a self-service environment? (Alternative: What percentage of those calls started in a self-service environment?)

Self-service completion rate:

Divide the number of customers who resolve their matter in self-service by the number that start addressing their issue in self-service.

Specialty Routing Score:

What percentage of an agent's interactions are in the agent's area of specialty/expertise?

The Special Report Series

Our readers are action-oriented and results-driven: they do not simply want to learn about challenges — they want to leverage innovative thinking to achieve unprecedented success. As a result, we introduced the CCW Digital Special Report series to transform today's challenges into tomorrow's opportunities. Featuring insights from world-class executives and exclusive research, the reports dive deeply into pressing CX and contact center topics. New reports - each focusing on a unique topic - will be published twice monthly.

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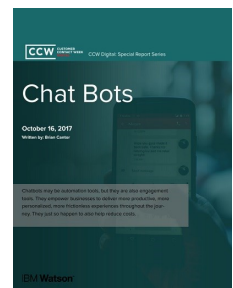
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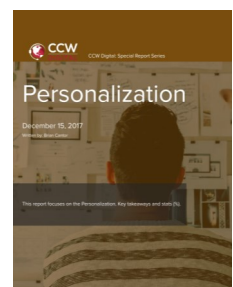
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Updated as of 11/8/17

Publish Date	Report Topic	Sponsorship Deadline
Jan. 2	2018 Predictions	Dec. 15, 2017
Jan. 15	Retail CX	Dec. 20, 2017
Feb. 1	Omnichannel	Jan. 18, 2018
Feb. 15	Travel Disruption / CX in Space	Feb. 1, 2018
Mar. 1	CX Automation	Feb. 15, 2018
Mar. 15	Agent Experience	Mar. 1, 2018
Apr. 2	Brand Reputation	Dec. 15, 2017
Apr. 16	Outsourcing	Mar. 30, 2018
May 1	Luxury	Apr. 13, 2018
May 15	Agent Performance Pt. 2	Apr. 27, 2018
Jun. 1	Customer Journeys	May 18, 2018
Jun. 15	Self-Service	Jun. 1, 2018
Jul. 1	FP3 Experience	Jun. 15, 2018
Jul. 15	Outbound & Proactive Engagement	Jul. 2, 2018

2018 Special Reports Calendar

Publish Date	Report Topic	Sponsorship Deadline
Aug. 1	Actionable Analytics	Jul. 19, 2018
Aug. 15	Customer Complaints	Aug. 1, 2018
Sep. 4	Chatbots Pt. 2	Aug. 21, 2018
Sep. 17	eCommerce & the Digital CX	Sep. 3, 2018
Oct. 1	Learning & Development	Sep. 18, 2018
Oct. 15	Remote Agents	Oct. 2, 2018
Nov. 1	Future Workspaces	Oct. 18, 2018
Nov. 15	Knowledge Management	Nov. 2, 2018
Dec. 3	Live Chat	Nov. 16, 2018
Dec. 17	CX Automation Pt. 2	Dec. 3, 2018

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About the Author:

Brian Cantor, Principal Analyst
Customer Management Practice

Brian Cantor authors the special reports series. In his role, Brian leads all customer experience, contact center, technology and employee engagement research initiatives. Citing this proprietary research, Brian authors the special report series.

Brian additionally serves as managing editor and director for CCW Digital, which is the largest web publication and community for customer experience professionals. CCW Digital's articles, commentaries, infographics, executive interviews, webinars and online events reach a community of over 140,000.

A passionate advocate for customer centricity, Brian regularly speaks on major CX conference agendas. He also advises organizations on customer experience and business development strategies.

Meet our Analysts:

Brian Cantor

Principal Analyst &
CCW Digital Director

E: Brian.Cantor@iqpc.com

Michael DeJager

Principal Analyst,
Experience Design Series

E: Michael.DeJager@iqpc.com

Lisa Schulman

Senior Analyst,
CCW Series

E: Lisa.Schulman@iqpc.com

Nadia Chaity

Senior Analyst, Customer
Delivery & CCO Series

E: Nadia.Chaity@iqpc.com

Amber Morgan

Senior Analyst,
CX Series

E: Amber.Morgan@iqpc.com

Get Involved:

Simon Copcutt

Head of Strategic Accounts

E: Simon.Copcutt@iqpc.com

Max Ribitzky

Business Development
Director

E: Max.Ribitzky@iqpc.com

Don Alderson

Digital Strategist

E: Don.Alderson@iqpc.com