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Getting ready for the Universal Agent

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Having agents that can handle 'any call from anywhere at any time' sounds like the Holy Grail for call centre managers. But before you can go all Martini with your agents, there are many hurdles to overcome. Here Cindy Curtin, Director of Product Marketing & Communications at Jacada offers some advice

If your company has a contact centre, chances are you have heard or said the term "Universal Agent" in a meeting recently. There is not yet a standard definition for universal agent. To some, a universal agent is one who can handle both inbound and outbound interactions. To others, it is one who can handle interactions in a variety of channels, whilst others see it as one who can handle a variety of call types, regardless of complexity, product type or required skill set.

The truth is it is an agent who can operate with whatever level of flexibility your company needs. It's a trendy concept: having agents that are able to handle any call from anywhere at any time on any topic is the Holy Grail of contact centre efficiencies.

It's no surprise then, that the idea is gaining momentum. If there is one place where greater efficiencies are needed, it's the contact centre. Some industries, like telecommunications, are challenged by a rapidly-growing product set that requires agents to be able to service multiple products, such as video, voice, and data services. The competitive nature of other industries, such as retail banking, requires agents to attempt to turn every service enquiry into a sales opportunity.

Clearly the contact centre agent is being asked to do more, and more quickly, with more complexity and less time.

Therefore, it seems like the universal agent model is a great idea as it creates obvious efficiencies, allowing agents to play a variety of roles. The model can also increase customer satisfaction as customers can receive resolution for multiple enquiries from one agent. This also reduces communication costs, since one customer is not placed into multiple queues for different requests.

However, implementing an effective universal agent model has its hurdles. Firstly, you must find and train agents with broad skill sets. Secondly, for the universal agent to be successful, you must address a significant operational problem that threatens all of the benefits that prompted you to move towards universal agents in the first place.

What is that operational problem? Let's think through what it means to be able to handle any call from anywhere at any time on any topic. Firstly, a universal agent must know all of the transactional processes that could take place in the contact centre. Secondly, a universal agent must be proficient in the use of all the tools necessary to handle any type of customer interaction. That means he/she must understand every application (billing, inventory, CRM system, etc.) and, more importantly, how each call flows through those applications. Added onto that are all of the tools through which they can communicate with the customer (live chat, email, Instant Messaging, voice).

Not only is this a lot to know, it is a lot to do. The agent's desktop can be complete chaos, with dozens of open applications and tools, each of which contains important – but siloed – information. In other cases, there may be only a few applications on the desktop, but they are not aligned with the call flows, so agents waste several minutes navigating through cumbersome applications because they cannot quickly access what they need. Therefore, unless you streamline the application processes and combine the applications into one, easy-to-navigate desktop view, the improvements in agent utilisation that you gained by implementing the universal agent model will be negated by the inefficiencies that result from process and application overload.

Implementing a unified service desktop which enables the agent to access process-specific tools, best addresses both of these problems by providing a single point of access to all the mission-critical applications and tools required by the agent to effectively complete a customer interaction. This also allows contact centres to match particular sets of process flows.

The unified service desktop is designed to present only the information and tools that are in context to the current conversation, which makes the universal agents more efficient and effective. For example, an agent for a communications service provider that normally handles wireline services will most likely have wireline applications and a wireline service knowledge base displayed prominently on his/her desktop. Should that agent need to take calls for another centre that handles Internet service, using a unified service desktop, the agent would change their role to "Internet service calls" and the script, available applications and knowledge base would all change to support Internet queries.

Finding and implementing a unified service desktop solution should be considered critical path for a universal agent programme. While researching your options, make sure you understand the key attributes of a well-designed unified service desktop:

- It should leverage your existing applications – the last thing you want to do is "rip and replace" your big CRM or billing and inventory systems and create a bigger mess.
- It should be thin-client – particularly if you are considering outsourcing, off-shoring or at-home agents, as you don't want to have to install and consistently update applications on every single machine.
- It should be easily adaptable – and able to be personalised to reflect the tastes and, more importantly, the role of the agent. The desktop should dynamically change to present different content and tools depending on the role that a universal agent is playing.
- It should be driven by call type – you should be able to allow agents to actively choose their role depending upon the call type, or configure the system so the correct desktop for the call type is automatically displayed based on a selection made in the IVR system, the phone number dialed or driven by rules in a skills-based routing tool.

Flexibility is a key characteristic of successful universal agents and the systems that support them should match this with diversity. There is no point embarking upon a universal agent programme only to shackle the agents with a chaotic desktop and laborious processes, which will quickly eat up your efficiency gains. Start with the desktop. You will make your life – and the lives of your universal agents – much easier.

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