

# Boost the Service Rep Experience

**Unleash rep productivity to  
improve customer experience**

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CHAPTER 1

# The Reality of Today's Service Rep

## Is this your service rep's reality?

Damien, a frontline customer service rep at an insurance company, has been on the job for eight months. He's become accustomed to most of the protocols and procedures to deliver what his company considers "top-of-the-line service."

Damien's customers often are reluctant to call and talk to a live person, and so they try to solve their problems themselves through self-service. When they do call, they are more likely to have a complex problem. This has led to an increase in talk time over the past few years, and customer call volume is remaining stable.

Despite his experience on the job, Damien often performs workarounds that are not sanctioned by the company, places customers on hold and asks his peers for help. Worst of all, Damien's focus is split between navigating internal systems and listening to the customers.

The extra time it takes for Damien to find the right resources or escalate an issue causes some customers to express their frustration. Despite following top-of-the-line procedures, his experience trying to help customers resolve their issues is not easy or without effort.

Reps like Damien are expected to handle increasingly complex issues in a timely manner as well as provide a tailored, high-quality service experience. It's a tough balancing act.



**As a result, service leaders need to **improve service rep efficiency**, while simultaneously maintaining the quality of the customer experience.**

# The Reality of the Job Today

In the span of just one day, on average, reps experience:

## 8.2

different systems and tools used in customer interactions

## 23

colleague interactions (supervisors/peers) while resolving customer issues

## 130.5

different support interactions (systems and colleagues)



## Tools and systems to the rescue

In a 2018 poll of service leaders, 60.7% agreed that improving frontline productivity is more difficult than it was three to five years ago.

To combat this challenge, many organizations pursue various rep-facing technology projects.

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Over the past three to five years, service leaders added or updated an average of 8.6 new tools and systems to assist frontline service reps.

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Organizations introduce tools such as CRM, knowledge management and agent dashboards to make the lives of reps like Damien easier. But the disjointed nature of how these tools interact creates more hurdles. Too often, Damien scans his cluttered desk for notes with the appropriate steps to resolve a specific customer issue,

or opens a chat window with a colleague to ask in-the-moment questions. Given the various sources of information, processes and escalation protocols, Damien spends more time working internally than he does understanding customers' situations and solving their problems. In short, Damien struggles to provide a low-effort and quick interaction for customers because he's just bogged down.



**“No matter how many additional systems, tools and resources service leaders add to increase productivity, the average live service interaction takes longer than it did in the past.”**

Rick DeLisi, Principal Executive Advisor, Gartner

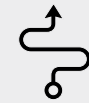
## Seven factors that impact rep productivity

Despite the investment in systems and tools to improve the frontline, service leaders see little return. Although these tools and systems should support and enable success, a majority (76%) of service leaders report they struggle with the planning and execution of these projects. These projects do not return the expected productivity gains.

To better understand how to run a more efficient operation without harming the quality of interactions, Gartner identified seven factors that impact rep productivity.



**Customer Pressure:** The demanding or emotional nature of customers who interact with reps



**Resolution Complexity:** The hard-to-answer or not straightforward paths to resolution, coupled with customer savviness



**Supervisor Support:** The quality of coaching and support reps receive from their supervisors



**Policy Adherence:** The expectations that reps will follow company policies and quickly adapt to changes in policy



**Training and Communication:** The applicability of training received, and the transparency from management about organizational or policy changes



**Product Complexity:** The technical details of products and services, as well as the number of different offerings

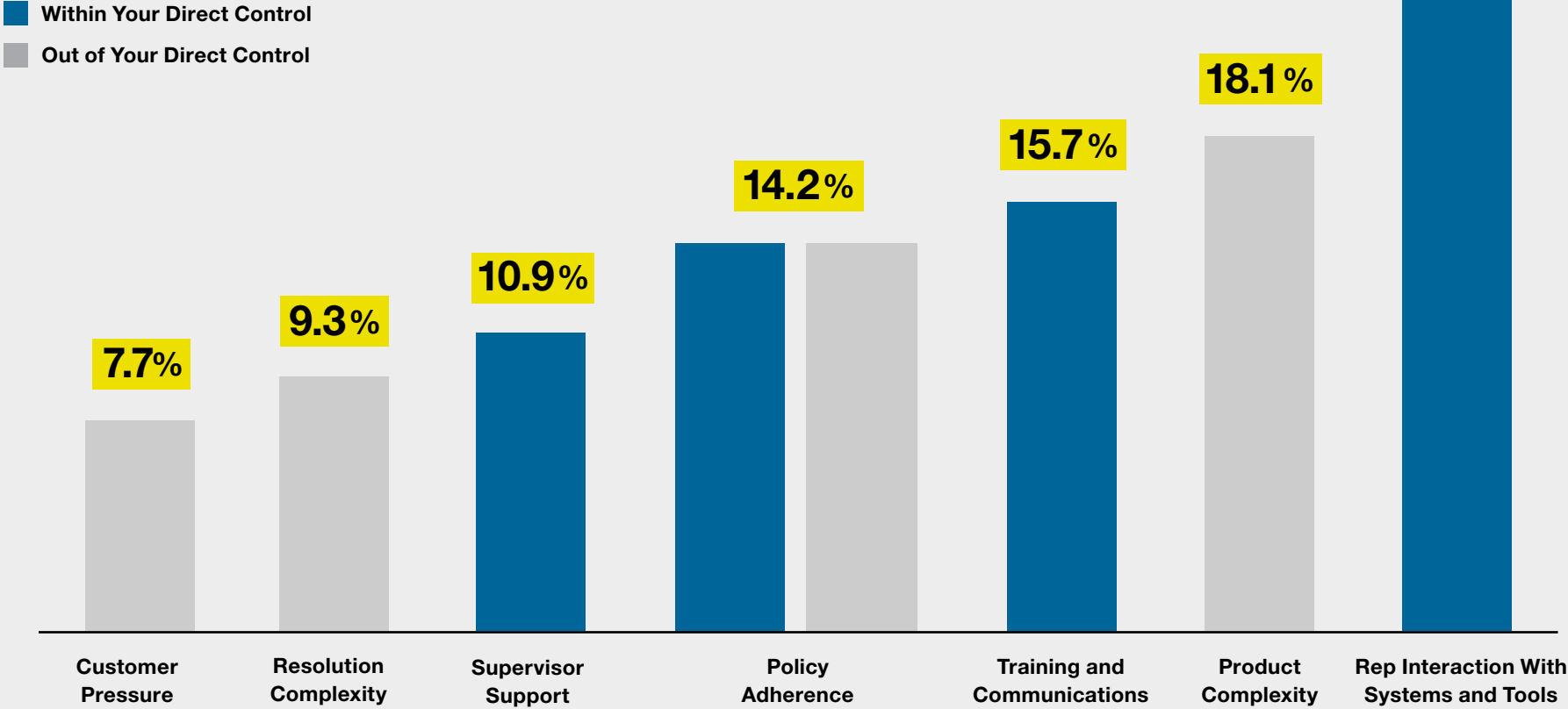


**Interaction With Systems and Tools:** The ability of systems and tools to enhance reps' issue handling, simplify rep work and enable focus on customers

# What Matters

## Most?

Relative Impact of Factors on Productivity  
(Percentage Variance Explained)



**Of all these factors, one has the largest impact on rep productivity: Reps' interactions with systems and tools.**

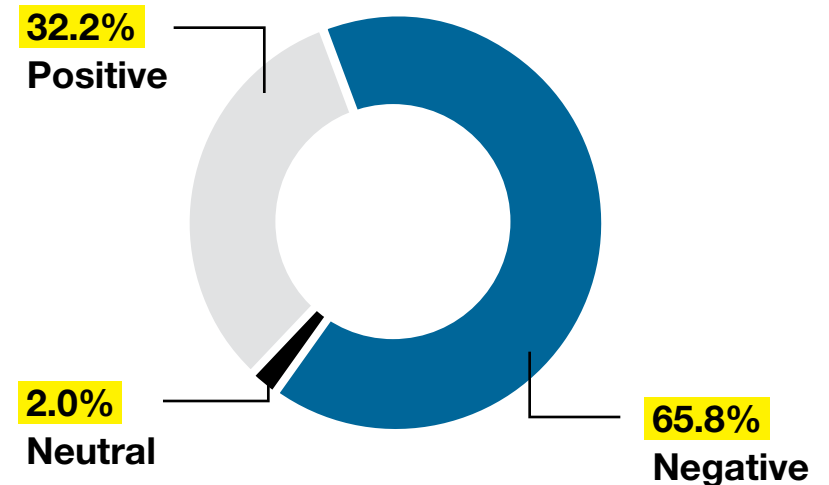
n=2,024 frontline reps from 351 teams, 29 companies  
Source: CEB analysis; CEB 2018 Frontline Rep Productivity Survey

Adding systems and tools without clear guidance from reps or ensuring that they will be a good fit within the service rep's process is more of a hindrance than a help. The good news? Rep interactions with systems and tools are affected by service leadership. To make improvements, service leaders must first understand the current state of the rep experience and then uncover how to optimize the job.

When surveyed, a majority of frontline reps describe their systems using negative words. Reps associate tools as being a problem rather than a way to get to a solution. "Less than one-fifth of reps think all the systems and tools help them focus on customers during their interactions," says DeLisi.

Service leaders have their work cut out for them. Not only do systems and tools have the greatest impact on rep productivity, but they are also the biggest areas for improvement, according to reps.

### Frontline Rep Description of Systems and Tools



#### Top 5 Negative Words Used to Describe Systems and Tools:

- Frustrating
- Confusing
- Complex
- Inefficient
- Difficult

n = 2,024 frontline reps from 351 teams, 29 companies.  
Source: CEB analysis: CEB 2018 Frontline Rep Productivity Survey



CHAPTER 2

# Shift From Customer Experience to Rep Experience

Service leaders spend considerable time thinking about the customer experience and how it translates into increased loyalty. They talk about why it's important to feel empathy for the customer, but often fail to turn that around to think about their own reps who sit on the frontline. Reps are crucial to ensuring a high-quality customer experience.

“The success of the service organization comes down to two people, the rep and the customer, and service leaders are neither of those people,” says DeLisi.

**“Instead of asking how to make reps more productive, service leaders should consider what’s standing in the way of reps’ focus on helping customers.”**

Rick DeLisi, Principal Executive Advisor, Gartner

This requires service leaders to embrace a new concept, one that Gartner calls the rep experience.

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Gartner defines the rep experience as the interactions of frontline reps with systems and tools required to resolve customer issues.

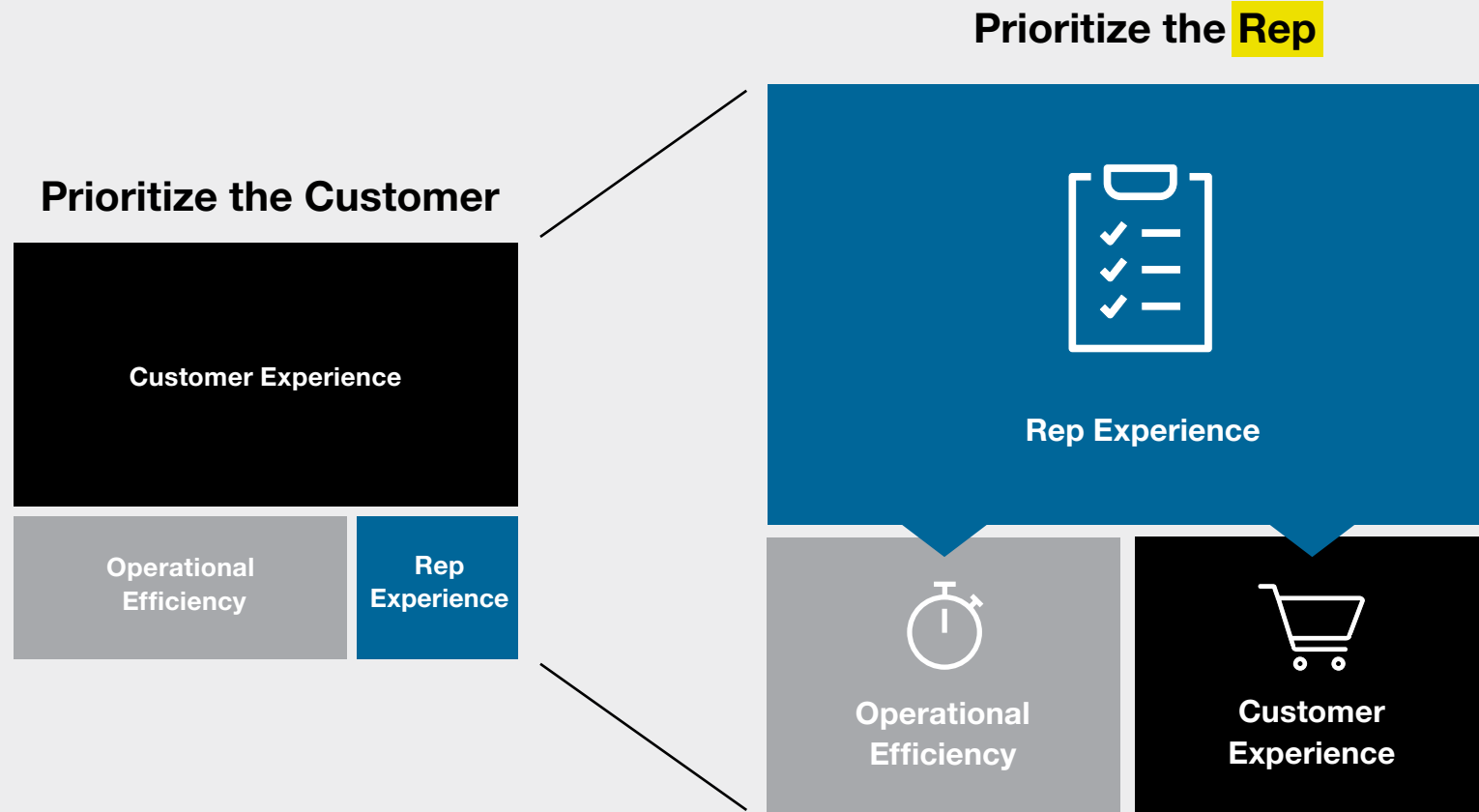
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To shift focus from the customer experience to the rep experience, service leaders must understand that by improving the rep experience, the organization will see improvement in operational efficiency as well as the customer experience.

# The Rep Experience

## Above All Else

Comparison of Service Leader Mental Models



**Conclusion: Make it easier for reps to focus on the customer.**

Source: CEB analysis

This shift does not mean the customer experience is not important. Rather, it's essential to dedicate more resources to the rep experience so that the rep is better able to serve customers.



**“Customer experience with live channels is driven by the **experience of the frontline rep** tasked with solving their problem.”**

Devin Poole, Senior Executive Advisor, Gartner

## Tame the complexity

To relentlessly support Damien and frontline reps, service leaders should lighten the load during live interactions.

“If service leaders don’t understand what gets in the frontline’s way, then they cannot make the required changes to improve the service experience,” says Poole.



**Gartner identifies two ways to tame the complexity and enable frontline reps to focus on helping customers. Service leaders should **identify and remove barriers to rep productivity and uncover creative, quick-hit wins** that will impact reps’ day-to-day experience.**

A photograph of an office environment. In the foreground, a woman with long dark hair is seated in a bright orange office chair, facing away from the camera. To her right, another woman with dark hair, wearing a blue and white checkered button-down shirt and a dark skirt, stands and looks towards the seated woman. The background shows office desks with computer monitors, a printer, and desk lamps. The lighting is warm and professional.

CHAPTER 3

# Identify and Remove Barriers to Rep Productivity

Many organizations already have customer experience measures in place. They collect voice of the customer (VoC) data through surveys and observation to identify customer pain points. To improve rep productivity, try focusing your VoC collection methods internally to listen to your own reps.

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### Instead of voice of the customer, think voice of the rep.

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Focus groups, surveys, sidejacking and observation can be turned inward to uncover a better picture of the rep's experience with systems and tools. Although pain points in the rep experience will be different for each company, using customer experience measures is a great way to truly understand and remove the day-to-day obstacles that reps encounter.

At Zeta Company, a pseudonym for a global provider of information services, valuable information from the frontline is captured through support resources already in place at the help desk. The concept of a help desk is not revolutionary, but using each interaction to capture trends in pain points provides increased value. This is an easy way to capture voice of the rep (VoR) using a support resource already in place.

When Monique, a frontline rep at Zeta Company, doesn't know how to access a previous service interaction, she calls the help desk. The help desk rep explains how to find notes from the previous service interaction. Monique then can get back to the customer quickly and with the right information. The role of the help desk doesn't end there; now the help desk rep will classify this type of call — in this case, lack of awareness of system functionality — so that trends can be uncovered. Perhaps Monique is the third rep to call the help desk today with this issue. By capturing this information, the help desk can understand trends and prioritize fixes.



Implementing this scalable way of learning about the rep experience requires a slight investment. Zeta selected high-performing service reps who were familiar with systems and processes to staff the help desk. These help desk reps used a framework to categorize and prioritize the most common issue areas that need improvement. The framework is important because it provides a way to classify the root cause of each rep issue and aggregate potential next steps for improvement.

This help desk leverages reps' daily experiences to create targeted opportunities for frontline improvement. And Zeta realized great results:

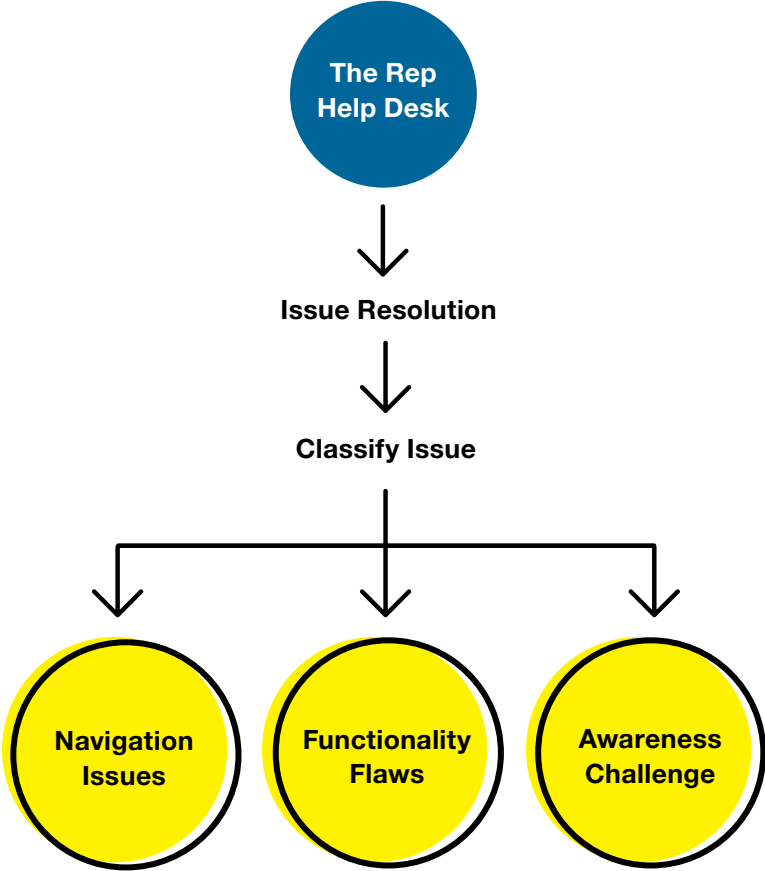


**In the course of six months, Zeta saw a 52% reduction in calls to its help desk because of the fixes put in place to decrease pain points in the rep experience.**

### In the Moment Voice of the Rep

#### The Rep Help Desk Overview

Selection of a high-performing rep, familiar with navigating and leveraging support infrastructure, ensures other reps get high-quality guidance from the rep help desk.



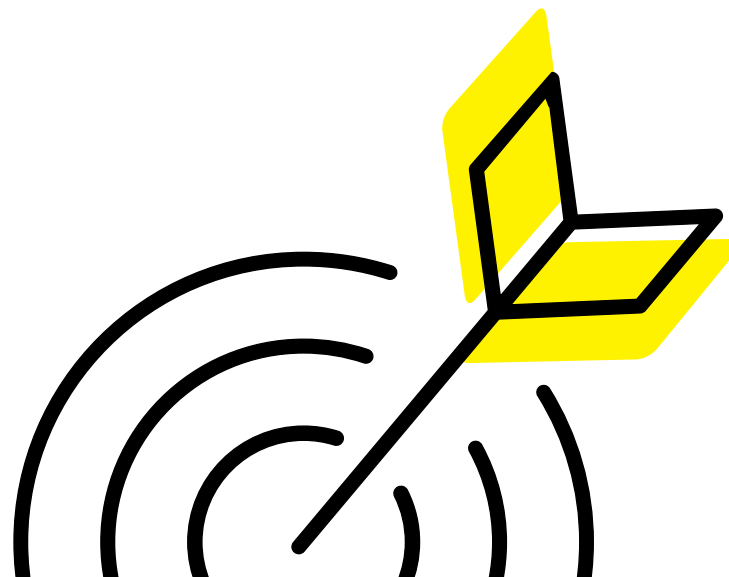
Source: Zeta Company; CEB analysis

Conducting focus groups is another common tactic that can be deployed internally. These groups provide an opportunity for organizations to uncover unarticulated pain points in the rep experience — directly from reps.

A laboratory technology manufacturing company we'll call Theta, conducts rep focus groups to identify unnoticed sources of rep effort. The key difference from a traditional focus group is that Theta asks reps questions at each step in a system's workflow as opposed to just "What is the problem?" By stepping through the workflow, Theta helps reps recall specific barriers to accomplishing their jobs. Reps are also asked to quantify the effect the barriers have on their performance, the customer and the business.

Let's say a high-performing frontline rep has worked for Theta for a year. Given his time on the job, he might see high-effort activities as status quo for the job, not realizing they are pain points. When led through each of the steps in a common workflow, he is able to identify specific barriers and steps or tasks that are unnecessarily complicated or unhelpful. He quantifies the effect these barriers have on his call length and his ability to focus on serving the customer, resulting in a prioritized list of barriers for removal.

These two examples show how easy it is to generate actionable VoR with existing VoC collection methods. No matter how VoR information is collected, understanding the rep experience is key for service leaders to unburden frontline reps.





CHAPTER 4

# Quick Wins to Improve the Rep Experience

After listening to reps, service leaders may find many types of pain points in the rep experience. Typically, the most apparent areas of improvement require the biggest lift and take the longest to implement. These top-of-mind projects, such as making CRM updates, involve more stakeholders, are less likely in the direct control of the service leader and take longer to demonstrate impact.

Service leaders can't possibly know what changes are needed without getting up close and personal to the rep experience. **To identify near-term actions service leaders can take to help reps focus their time and attention on the customer, service leaders should consider two approaches:**

- 1 Study reps as they work.**
- 2 Create channels for reps' voices to be heard.**

### **Study reps as they work**

It's been said before — it's hard to make improvements if you're not actually sure of what's going on. This applies to all employees who have any stake in the customer service function, for example, partners from IT, process engineering or operations.

Often, these cross-functional relationships lead to misalignment in technology expectations that result in the proliferation of unnecessary technology and rep-facing systems. This misalignment creates additional burden on reps. When designing or upgrading rep-facing systems, most cross-functional stakeholders take a top-down approach. They focus their attention on efficiently mapping technologies to business processes. This results in systems and tools that are not attuned to the ways in which reps actually work.

**“Shift away from the highly visible toward the highly achievable. Most organizations have the biggest opportunity through the smaller, but easier, changes.”**

Devin Poole, Senior Executive Advisor, Gartner.

Instead, these stakeholders should focus on how frontline reps work and how they use systems and tools. This understanding provides the basis for informing technology projects.

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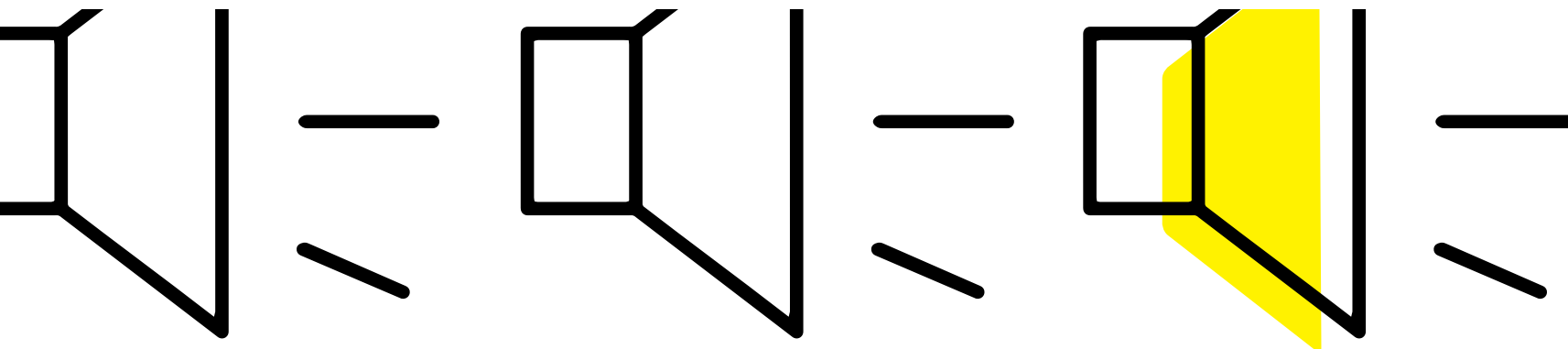
Apollo, a pseudonym for a large retail company, deployed a new service role, called a “Translator,” that focused on turning rep needs into workflow realities.

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At Apollo, the Translator was from IT, but the role could apply to any stakeholder tasked with improving the rep experience. The Translator spends a majority of his or

her time observing frontline rep interactions with systems and tools and uncovering nonobvious rep needs and potential solutions. Given his or her extensive knowledge of the job, the day-to-day hassles and the reps’ feedback, the Translator then reports back to leadership. By voicing reps’ needs — and advocating for the right projects and initiatives — workflows, processes, systems and tools can be updated or eliminated altogether.

As in Apollo’s example, embedding a Translator from across the business is an excellent way to ensure partnerships that have the singular goal of improving the rep’s experience. Our next example shows how a Translator, or observer, can focus on specific pieces of the rep experience and identify particular areas for improvement.

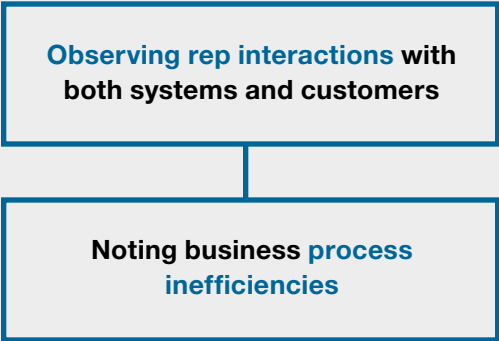


# Meet the Translator

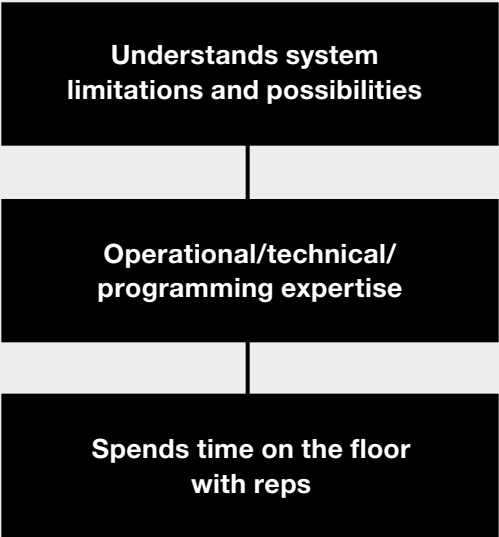
Communication of Frontline Workflow and Related Needs



## Embedded Observation and Study of Reps



## The Translator



## Communication of Rep Needs



**This idea is best applied to nearly ANY role responsible for improving the rep experience.**

Source: Apollo: CEB analysis

## Watch multiple reps

Many organizations observe reps, typically following a single rep through the course of a day or two. Webster Bank did something a little different. Instead of only watching one rep, Cynthia, they watched Cynthia and her co-workers Jade and Micah perform one workflow. Webster Bank is onto something here — watching multiple people do the same thing not only gives you more insight into how reps get things done, but also shows patterns across reps that help uncover true obstacles in the observed workflow and solutions for improving the rep experience. Watching different people do the same thing gives insight into what works and what doesn't. And as a service leader, the “what doesn't work” is the place to start.

**Gartner for Customer Service & Support Leaders can access the Rep Experience Observation Toolkit.**

## Create channels for reps' voices to be heard

Aside from putting stakeholders on the frontline, service leaders have the opportunity to position reps to give feedback and take part in the improvement of their function. This second approach enables reps to contribute solutions that improve productivity, engagement and the quality of customer service interactions. Companies may empower reps in different ways based on system accessibility, investment and implementation.

Fidelity Investments, a financial services company, created a companywide online community for its reps. This platform enables reps to work together to solve issues and improve operations. Fidelity provided all reps with access to a forum where they can ask one another how to solve certain customer issues and share best practices. This question-and-answer space enables reps to help one another when they're not tied up on the phone.

Fidelity's second use case for the forum is that it creates an appropriate place for reps to leave feedback on annoying and tedious processes, problems they have with systems and other obstacles that prevent them from getting their job done. This feedback is discussed among the larger group of reps on the forum, coupled with ideas for improvement. The best ideas, agreed on by the reps, are then passed for consideration by management. From there, management determines next steps for implementation and keeps the rep community apprised of progress. At Fidelity, reps feel more empowered, their ideas lead to fixes and gained efficiencies, and management is confident in the investments.

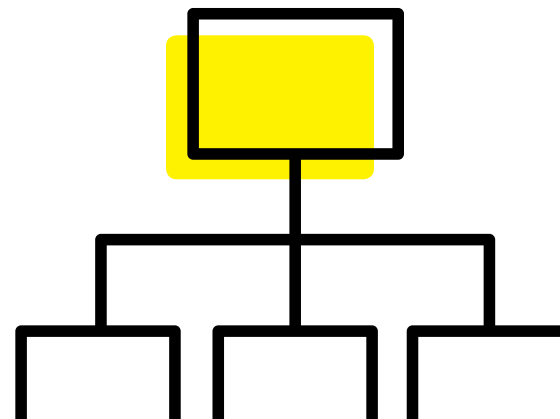
The idea behind Fidelity's rep community can be easily captured in other formats, many of which could be less resource-intensive. This could be done similarly to a restaurant comment card or an online survey received after making a purchase. These methods leverage reps' experience and empower them to be a part of the effort to make the service organization better.

As these examples demonstrate, it's clear that no single process, tool or system will magically fix rep productivity. Instead, service leaders should shift their focus to the reps to help build tools, processes and policies that revolve around their existing workflows. Service leaders should learn reps' natural workflows to identify how to best support productivity and quality.

### Trade-off not required

Service leaders do not have to think of productivity and quality as being a seesaw relationship. In fact, focusing on the rep experience is likely to improve both.

What is important is that improvements to the rep experience trickle down to improve the productivity of the service operation and the quality of the customer service experience. Any positive movement in a rep's perception of their ability to easily help customers can have a positive effect.







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