ICMI™ TOOLKIT

The Road to Agent Experience Maturity:
A Self-Assessment

INTRODUCTION

Agent satisfaction is vital for customer experience, but based on ICMI's latest research, many organizations and leaders are challenged to keep agents motivated and engaged for the long-haul. In recent years, the focus in the contact center industry has primarily been on improving the customer experience (CX), but what's often not adequately addressed is the importance of prioritizing the agent experience (AX). Without a consistent strategy executed to address people, processes, and technology as it relates to enhancing the agent experience, contact centers will continue to see challenges with attrition and a lack of engagement, all of which are direct causes of poor customer satisfaction.

In this toolkit, we'll provide you with a framework that you can use to enhance your agent experience while improving the overall effectiveness, and impact of your contact center. Using this toolkit, you can assess your team's level of AX maturity, so you can identify continuous improvement opportunities and become more proactive. With the step by step resources of this toolkit at your disposal and a reliable strategy in place, you will enrich the AX within your contact center, to better align people, process, and technology efforts more successfully.

Let's begin the adventure of enhancing AX and maturity.

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PART 1: ESTABLISHING A FRAMEWORK FOR AX MATURITY

CUSTOMER CARE DIRECTOR

WHO OWNS AX?

WORKFORCE MANAGER

IT DIRECTOR

According to Gartner, more than 90% of organizations view CX as their primary source of differentiation. Organizations are hyper-focused on creating unique and superb customer experiences, but these same organizations often neglect to give the same attention to the employee experience. In fact, ICMI's latest research shows that only 50% of organizations prioritize employee experience, and largely in passive ways, like anonymous/blind engagement surveys.

The issue with engagement surveys is that they don't get to the primary goal, which should be about improving the employee experience to enhance overall employee satisfaction. This is no less true at the level of lines of business, like the contact center; arguably, it's more important, as there's a direct connection between agent satisfaction and customer satisfaction. But a mature, successful agent experience (AX) program is more than just pizza parties and prizes. Like any relationship, personally or professionally, success often hinges on building relationships and understanding the needs of others.

Leaders and organizations that invest their time and energy in communicating, developing, and prioritizing AX will reap improved CX. Agents care more about the work they perform when they perceive that their leaders value them and their strengths, and support them by helping to eliminate obstacles or roadblocks. In fact, in a recent study conducted by ICMI and NICE inContact, leaders with a clear vision and strategy were the leading factor in high agent engagement (24%), while inadequate and hard-to-use systems were one of their biggest challenges (30%). There are countless other variables that affect AX, from career growth opportunities to rewards and recognition, organizational change management to effective, modern tools and technology, but crucially, there's no fast track to effective AX. It takes ongoing commitment to making continuous improvements to people, process, and technology.
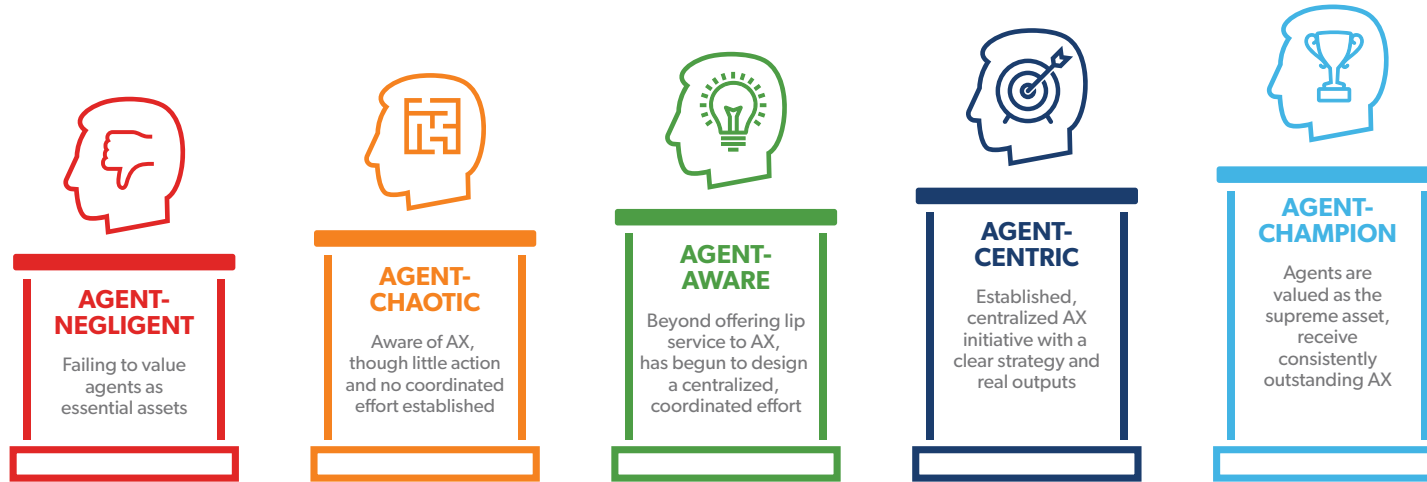
With the right foundation, improving AX is possible; and with a better AX program and strategy in place, a better CX is achievable. The resources and framework included in this toolkit

will act as a strategy and roadmap for aligning and enhancing people, process, and technology for maximum agent and customer benefit.

Before we move on to the assessment phase, let's begin with a brief overview of our AX maturity model. We've identified five levels of maturity:

- **Agent-Negligent** – A contact center that fails to value agents as vital assets and doesn't consider AX a priority. AX is either not measured or is measured infrequently. Most processes, like training, scheduling, and evaluation are manual, with little to no tools.

- **Agent-Chaotic** – A contact center that is becoming aware of the value of prioritizing AX. While the contact center has taken no significant actions, budget dedicated to training or tools, or made a coordinated effort associated with it, AX is at least acknowledged and talked about as something important.

- **Agent-Aware** – A contact center that is starting to "walk the talk" regarding enhancing AX and has begun to make coordinated and direct efforts to implement improvements in the areas of hiring, training, and engagement, and there is more consistent measurement of AX.

- **Agent-Centric** – A contact center that values its agents, considering them in every major business decision, project, or initiative. These contact centers prioritize, budget, and strategize AX initiatives to produce specific outcomes that drive agent engagement motivation, engagement, and retention.

- **Agent-Champion** – A contact center that values, develops, and prioritizes agents as one of its most valuable assets and sources of competitive advantage. In these contact centers, proactive and industry-leading initiatives and technology combined with near-perfect execution lead to a first-class AX program that supports agent engagement and empowerment.

5-STAGE AX MATURITY MODEL

AGENT-NEGLIGENT

Failing to value agents as essential assets

AGENT-CHAOTIC

Aware of AX, though little action and no coordinated effort established

AGENT-AWARE

Beyond offering lip service to AX, has begun to design a centralized, coordinated effort

AGENT-CENTRIC

Established, centralized AX initiative with a clear strategy and real outputs

AGENT-CHAMPION

Agents are valued as the supreme asset, receive consistently outstanding AX

Next, let's review the people, process, and technologies associated with each stage of the AX maturity model. As we go through this, reflect on the gaps between each area and identify requirements for developing or advancing your contact center's AX program.

Before we dive in, it's important to note that many organizations and leaders might not have a dedicated AX program in place yet – in recent research conducted by ICMI, just over half of respondents report surveying agents as part of a formal AX program. Even if they have the right activities or components, they might not be in a position yet to classify them as a cohesive "Agent Experience Program." For years, most research and efforts have been focused almost exclusively on CX; only in the last couple of years has AX started to become more widely considered. Unfortunately, efforts to put the customer first have often come at the expense of the agent. Engagement surveys, exit interviews (due to high attrition), and one-on-one conversations bear this out: contact center agents are under tremendous pressure to put themselves in their customers' shoes, but the reality

is that many contact center leaders, despite many of them once having been agents at some point in their careers, aren't putting themselves in their agent's shoes to understand and improve their day-to-day experiences.

Regardless of which stage your contact center is within the maturity model, it's essential not to get discouraged. The road to AX maturity is a journey; it can't be instantly implemented with the snap of your fingers. To set expectations appropriately and to ensure the best experience possible, effective communication and change management skills are vital throughout the journey. The process of building an AX program must be intentional.

Now, let's take a more in-depth view of the five stages of AX maturity. As you're reading, visualize where your contact center is currently. Hold up a mirror to your organization and contact center; look at each stage objectively. The AX maturity assessment that follows will assist you with evaluating your current state; the

descriptions and gap analysis in Part 3 will provide you with insights and next steps to move forward in your contact center.

First, let's break down the people, process, and technology decisions associated with each of these stages.

AGENT-NEGLIGENT

While most contact centers are beyond this stage of maturity, many organizations fail to recognize the value provided by their agents. Often looked down upon or forgotten as part of broader decisions, the contact center in these organizations is an afterthought. Minimal investment in training, resources, or technology often inhibits the agent experience, resulting in high dissatisfaction and, consequently, very high levels of attrition. Basic considerations, like stable hours and fair wages, are also either nonexistent or low priority.

- **People** – The agents in an Agent-Negligent contact center are rarely considered as essential assets in the contact center's journey. Often regarded as a necessary part of doing business, customer support agents are given little to no attention. Employee engagement is low or nonexistent, with agents often burnt out and apathetic to the needs of customers. Motivated to do the bare minimum, agents primarily work intending to do only enough not to get fired. Organizations that are stuck in this stage shouldn't expect outstanding CSAT.

- **Process** – A lack of documented and well-thought-out procedures typifies the agent experience for organizations in this stage. Barriers to efficiently providing support are everywhere, wrapped up in layers of bureaucracy and opaque decisions that confuse agents. Forced to conform, agents do whatever they need to do, resigned to the fact that "it is what it is." Stable leadership and direction are lacking or invisible. There is no formal approach to quality or performance management; agent feedback is not collected; and there's little to no formal onboarding or ongoing training program (if there is, it's ad hoc, unplanned). Absenteeism runs rampant, negatively affecting contact center operations, resulting in inconsistent service levels.

- **Technology** – Unfortunately, for agents in this stage, technology is in a rough state. Agents struggle with a job that's much harder than it should be, hampered by outdated and often unsupported tools and technology: basic, homegrown workforce management; manual, Excel-based scheduling; and little to no integration between systems or collaboration between agents, resulting in highly siloed information. Customers regularly feel the pain, as agents fumble with antiquated and disparate systems, with channels managed by different apps, if not manually, and contacts handed off manually. A high degree of effort is required by agents to accomplish tasks, resulting in error-prone work. Interaction volume is typically incredibly high, with delayed response times and reduced service levels.

- **Key Metrics** – Contact Volume

▦ AGENT-CHAOTIC

Contact centers operating in an Agent-Chaotic stage are consumed with firefighting and overly reactive, addressing issues well after they happen. Agents tend to exhibit a high degree of stress and frustration, both with the workload and how disorganized the contact center operations are. It's not uncommon for customers to experience a disjointed experience as the agents' struggle with multiple, nonintegrated systems and archaic processes. Leaders recognize the chaos agents are experiencing and may even express a desire and commitment to improving, yet they consistently fail to deliver on promises made.

- **People** – Agents in this stage are angry and frustrated. Feeling the effects of being burnt out, these agents want to change but feel powerless to make it happen. Leaders sometimes promise change, but often struggle to do so, either because they don't prioritize the time and budget or it's mere lip service. Initiatives promised to improve the agent experience may be started but not completed. Processes are weak and cobbled together by inefficient and often outdated manual tools, making work much more challenging. Agents are often disengaged, seeking any opportunity or way to get "out of the queues," and there is no formal retention plan to mitigate this turnover.

- **Process** – Usually, during this stage, a contact center leader begins to realize that processes, metrics, and consistent training are required. However, these efforts are often stymied by the latest crisis or fire. Quality and performance management are developing processes, with no dedicated staff or tools/systems. Change management efforts are often confusing for agents, resulting in frequent updates or revisions, followed by poor communication, which further tries agents' patience. If collected at all, agent feedback is fragmented. Onboarding is unstructured, focusing on fundamentals, and there is no dedicated training

program for ongoing professional development. Instead, the focus is primarily on efficiency and average handle time, stressing out agents who compromise quality for quantity, without understanding the impact it has on CX.

- **Technology** – Contact centers at this stage have invested in basic systems and tools (CRM, PBX, etc.), but each operates in isolation; information continues to be highly siloed, difficult to access and analyze, and channels are still managed by different applications, requiring manual routing and handoff. Workforce management continues to be a largely manual function, with homegrown tools and Excel-based scheduling. Reporting is often basic – with information extracted from and transferred manually between disparate systems – resulting in a culture characterized by overreaction that negatively impacts the agent experience. Considerable time and effort are invested in combining data to provide insight for senior leadership, without much explanation or understanding of what is being shared or why. Collaborating across touchpoints within the organization is difficult. Held back by outdated or homegrown tools, agents are frustrated, struggling with a high volume of manual work. Access to critical information and resources most likely exists within the organization but is hidden behind byzantine processes and walls of approvals.

- **Key Metrics** – Service Level, Average Handle Time

☀ AGENT-AWARE

The Agent-Aware contact center is typically led by a leader who sees the flaws in the status quo and chaos plaguing agents and calls for significant and immediate changes. These leaders have taken up the charge to raise awareness, across functions and lines of business, that the AX needs to change. Working closely with senior agents, contact center leaders begin to develop a culture of coaching and data-driven decision-making based on individual reporting and basic scorecard

development. Contact center leaders pursue investments in technology to help scale the operation while improving efficiency and satisfaction, focusing on quick wins that prioritize fixing broken tools and processes. At this stage, agents are encouraged to share their insights and opinions on how to improve both AX and CX.

- **People** – Aware that agents are a significant factor in driving positive and sustainable CX, leaders develop tactics to improve AX, sometimes in consultation with agents. Agents are engaged with metrics-based coaching, and contact center leaders make structured, intentional efforts to ensure fairness in compensation, scheduling, and benefits, aligning them with industry averages and the wider organization.

- **Process** – With stronger leadership presence and support, individual KPIs and metrics are identified to improve on agent activity tracking and reporting; performance is managed against the achievement of these KPIs and metrics. Structured onboarding plans are in place, manually executed and managed by contact center leaders; there is a skills inventory in place for the agent role, and contact centers in this stage have begun to invest in formal training and tools/systems (e.g, third party, online, virtual) to support career and professional development. Agent feedback is collected via simple surveys, and connections between AX and CX are quantified by evaluating CSAT and surveys data. Processes are regularly documented, revised, and maintained. Leaders in this stage may shadow agents to engage directly with the role and its responsibilities, so they can better understand and articulate how agents contribute to organizational objectives; agents are more likely to be taken into consideration when implementing new changes to tools or projects.

- **Technology** – At this stage, technology may still include manual or homegrown elements, but efforts have been made to improve integration and shareability, enabling more widespread collaboration and facilitating flow of information across systems; this, in turn, enables the contact center to report

more effectively on performance against goals. Channels are integrated into a single desktop view, with simplified routing between channels; agents are able to support customers across multiple channels with greater ease. Basic workforce management tools are in place, though they may require manual inputs (e.g., service level, work time, contact volume) to determine optimum staffing levels. Likewise, Agent-Aware contact centers have likely invested in quality management tools/systems that enable them to track quality and performance, although inputs and outputs (e.g., coaching) still require manual oversight. Crucially, contact center leaders in this stage include agents' needs when making the case for new tools and technology, prioritizing options that can provide immediate improvements to either efficiency or revenue.

- **Key Metrics** – Engagement Score, CSAT, NPS, External Attrition Rate, Number of Absences

🎯 AGENT-CENTRIC

Contact centers that are in the Agent-Centric stage take the time to listen and act on feedback from agents. Regular team meetings and one-on-ones help agents achieve their work and development objectives, and formalized Voice of the Agent (VOA) programs are often in place, designed to capture feedback to drive ongoing continuous improvement while enhancing engagement. Automating process development is a priority, and metrics are refined to focus on insights needed to learn more about the AX, with coaching at the forefront, to empower agents to provide exceptional CX. Schedules are engineered to balance the needs of employees with business considerations. The technology used by Agent-Centric contact centers is designed to make providing support to customers more straightforward, with all the context-relevant information required quickly within reach. It's in this phase that contact centers begin to see the emergence of "universal agents" (or "super agents")

who are trained and/or equipped to handle all types of issues across all channels.

- **People** – Contact center agents working in an Agent-Centric stage are empowered, engaged, and excited to provide support. These agents understand their purpose and why they do what they do. Feedback is consistently captured through one-on-ones, surveys, and focus groups to help enhance both AX and CX. Leaders focus on trying to remove obstacles for agents while simultaneously coaching and developing team members to be as successful as possible. Agents' contributions are routinely celebrated, both from a leadership and team perspective.

- **Process** – Leaders in this stage regularly meet with agents to coach and provide feedback, at a minimum biweekly, reviewing KPIs while addressing personal and career development goals. With more clearly defined processes, agents are empowered to handle customer situations; dashboard and scorecards are commonly used, focusing on key metrics and KPIs that are monitored and referenced in performance management discussions and integrated into the training program. A structured onboarding program (supported by investment in formal training, performance management tools/systems, and dedicated staff) feeds directly into a sophisticated ongoing training program, personalized to each agent based on an individual gap analysis, and overseen by dedicated staff and supported by a dedicated budget. Career-pathing and job enrichment activities, both within and outside of the contact center, are all functions of an advanced retention program. Basic feedback management tools/systems manage the collection of agent feedback, centralizing it for ease of analysis alongside CX-related metrics, such as NPS or CSAT, which are used to validate that the AX program in place is working, while still acknowledging the need for iterative and continuous refinement.

- **Technology** – In an Agent-Centric contact center, tools are automated and enhanced, serving agents with knowledge and resources more efficiently, and

both agents and customers have access to new channels and tools, like self-service and remote support technologies, that make both their lives and their customers' lives easier. Unified desktop solutions, integrated with a CRM or other internal systems, provide a more complete understanding of the customer journey. Contacts are routed based on increasingly sophisticated algorithms that direct contacts based on agent skills, geographies, and other variables. Information flows seamlessly across and between systems, with reporting facilitated by out-of-the-box and custom features embedded in the solutions invested in at this stage. Advanced workforce management tools/systems are in place and integrated with other systems to facilitate scheduling and data collection, enabling real-time adherence and performance analysis. A dedicated team of quality analysts and managers oversees the execution of the quality management process, enabled by advanced quality management tools/systems. Equipped with the tools they need to support customers well, agents are more empowered to drive not only CX improvements but also continuous improvement to products and processes.

- **Key Metrics** – Agent Effort Score, Internal Promotion Score

🏆 AGENT-CHAMPION

Operating as advocates, contact center leaders in the Agent-Champion stage recognize the full value of agents, elevating their needs above all else. Agent attrition is primarily internally driven, either within the contact center to elevated roles through a designed career-pathing structure, or throughout the organization via promotions to other departments. Driving ongoing continuous improvement through leading efforts to improve the customer experience, empowered agents – at this stage, super agents – often take the lead on key projects to help improve products and processes.

Investments in technology are made proactively and strategically—researched, developed, and implemented well in advance—enhancing both AX and CX.

- **People** – Agents working in an Agent-Champion contact center are fully valued and they know it. They are paid at or above market value, with leaders seeing their contribution to organizational objectives as essential. Project work that drives improvements for both the business and the CX provide opportunities for agents to speak to the Voice of the Customer cross-functionally. Employee engagement scores reflect the team's positive and unique culture, with many members content to remain within the group. Those promoted within the organization but outside of the contact center maintain close ties to help further enhancing the agent experience, providing advanced knowledge of new tools, processes, and opportunities. Employees are fully aligned and rallied around the company's vision for the customer experience, and they understand their role in achieving it.

- **Process** – In Agent-Champion contact centers, agents work seamlessly across functions, collaborating without the restrictions or red tape that might otherwise hamper progress in lower stages of AX maturity. All levels of the organization are committed to soliciting insights and feedback from agents, who, in turn, feel empowered and trusted to act autonomously. Flexible schedules provide agents with the capability to work when, how, and where they are most successful. Training and development plans are personalized to each agent and integrated with the change management process, ensuring all training is up to date; the training system tracks progress toward completion automatically – gamifying results to increase engagement – and reports into workforce optimization. The retention program is also integrated with the training program and systems, automatically identifying retention targets and adjusting an agent's career development trajectory accordingly.

- **Technology** – Agent-Champion contact centers provide agents with access to best-in-class technology offerings that are fully integrated and automated to

provide a seamless, efficient experience that enables them to serve customers and deliver an optimal CX with ease. Unified desktops give agents a 360° view of their customers, and contact center leaders a 360° view of their agents. Reporting is automated and predictive, enabling sophisticated analysis of "what if" scenarios. Strategic technology investments have automated a majority of the repetitive interactions that characterized earlier levels of maturity, allowing agents to focus on more complex and stimulating interactions. Advanced workforce optimization tools/systems leverage AI and machine learning to automate scheduling across channels, real-time analysis, shift-bidding, personalization, etc. Routing is integrated with the WFO system, distributing contacts across channels based on skill or behavioral inputs. Cutting-edge feedback and quality management tools/systems capture agent feedback using advanced analytics (e.g., speech, predictive), the same tools used to track customer behavior and sentiment. Quick and responsive across all channels, agents can provide world-class service that merits high NPS and CSAT scores.

- **Key Metrics** – AXS (Agent Experience Score)

Building an AX program is vital improving CX and solidifying the organization's competitive advantage. The assessment in Part 2 will help you understand your current state, and Part 3 will provide guidance for closing the gaps.

PART 2: ASSESSING YOUR CURRENT STATE OF AX MATURITY

This assessment will help you evaluate and benchmark your contact center's overall AX maturity with regards to organizational, people, process, metrics, and technology functions. To complete this exercise, read each statement and rate your progress toward achieving that goal on a scale from 0 (no progress) to 4 (achieved). After you've finished, move on to Part 3 to learn how to tally your overall score and analyze the results.

ORGANIZATIONAL

ORGANIZATIONAL ALIGNMENT	Agents understand how failures in service impact the organization. Contact center management understands and can articulate the functions, processes, and activities that are critical to the organization's success, adjusting services in response to changes in the organization and/or customer requirements.	
GOALS AND OBJECTIVES	Operational, tactical, and strategic goals that align with the customer service and overall organization are defined, documented, and communicated.	
STAKEHOLDER ENGAGEMENT	The contact center invites stakeholders to provide input on goals and participate in the development of action plans. The contact center regularly and proactively provides feedback to stakeholders on the results of actions taken as a result of their input.	
RESOURCE ALLOCATION	Resource requirements and allocations are based on established service level targets and organizational goals/objectives and are regularly reviewed to accommodate changes in organization and/or customer requirements.	

PEOPLE

JOB DESCRIPTIONS	The agent role is clearly defined and accurately reflects activities, responsibilities, and requirements; descriptions are reviewed and/or updated annually, and are referenced during training, performance appraisals, and career development meetings.
AGENT SATISFACTION	A comprehensive agent satisfaction program is in place that includes multiple methods for assessing agent satisfaction and/or engagement and responding to feedback that doesn't meet minimum targets; the results are communicated to staff and relevant stakeholders and are used for continuous improvement.
AGENT SATISFACTION REPORTING	Agent satisfaction data is collected and reported on a regular schedule and evaluated against established performance goals/targets.
ONBOARDING	The agent onboarding training plan is documented; a mentor/monitor validates the successful completion of training for each skill, and the training plan is reviewed and updated regularly as changes occur.
ONGOING TRAINING	Gap analysis is performed against a documented skills inventory for the agent role; training priorities are set on a team and individual level based on the output of the gap analysis, and sufficient time (and funding, if required) is allotted to close skill gaps.
CAREER DEVELOPMENT	Career development discussions are conducted with agents at least annually, and are formally documented, including relevant goals and objectives; training and certification objectives are aligned with specific career development goals (i.e., promotion to a role with more responsibility).
REWARDS AND RECOGNITION	A reward and/or recognition program is documented and sufficiently funded, used regularly and consistently, and reviewed annually to assess effectiveness/impact; results are reported to staff and relevant stakeholders.
RETENTION	A formal retention program is in place, with documented criteria for classifying key positions (e.g., mission-critical, revenue-generating, innovation-driving) and identifying retention targets; management reviews the program at least annually and reports results to relevant stakeholders.
TEAMWORK	Agents are engaged in regular activities designed to foster teamwork; management identifies team-based goals and objectives, promotes the value of agents and the contact center to stakeholders, and celebrates successes, improvements, and contributions made by the team working together.

PROCESS

WORKFORCE MANAGEMENT	The workforce management process is based on one or more formal methods/models for meeting service level targets; it's documented, consistently followed, and reviewed at least annually for continuous improvement. Process is enabled by modern, automated workforce optimization tools/system.	
PERFORMANCE MANAGEMENT	The performance management process is aligned with organizational and contact center goals, provides staff with timely, constructive feedback, and is integrated with the compensation review process. Process is enabled by modern, automated performance management tools/system.	
QUALITY ASSURANCE	A quality assurance process is defined and consistently followed, with results communicated to contact center staff in a timely manner, along with appropriate recognition and/or coaching, and used as a performance indicator in the performance management process. Process is enabled by modern, automated quality management tools/system.	
FEEDBACK MANAGEMENT	The feedback management process (includ-ing capturing feedback and actions taken in response to captured feedback) is docu-mented, routinely followed, and reviewed for continuous improvement. Process is enabled by modern, automated feedback management tools/system.	
CONTINUOUS IMPROVEMENT	Processes and procedures are identified, documented, and reviewed regularly, but management and stakeholders, to identify deficiencies and improvement opportunities; the contact center regularly makes improvements and communicates with stakeholders in a timely manner.	

METRICS

SERVICE LEVEL/ RESPONSE TIME	Performance data is routinely collected, and service levels/response times are tracked and consistently achieved (within 5% of the objective) at the interval level for 70% of the intervals over the past 6 months.	
AGENT METRICS: TURNOVER, UNPLANNED ABSENCES, UTILIZATION, ENGAGEMENT SCORE, EFFORT SCORE	Performance data is collected and reported on a regular schedule, and reports show the established performance goal/target has been achieved or exceeded in at least 9 of the past 12 months (or equivalent reporting period).	
CONTACT METRICS: CONTACT VOLUME, AVERAGE HANDLE TIME	Performance data is collected and reported on a regular schedule, and reports show the established performance goal/target has been achieved or exceeded in at least 9 of the past 12 months (or equivalent reporting period).	

TECHNOLOGY

ROUTING TOOL/ SYSTEM	The routing system is integrated with other systems, like workforce management, and provides automated routing capabilities (e.g., skills-based, capacity, behavior), real-time stats for contact center management and staff, and alerts in advance of missing a service level target.
WORKFORCE OPTIMIZATION TOOL/SYSTEM	The workforce optimization tool/system is integrated with other systems, using volume of work, work time, and service level targets to determine optimum staffing schedules, as well as providing real-time stats on schedule adherence, quality management, and performance management.
OMNICHANNEL TOOL/SYSTEM	The contact center supports multiple channels seamlessly and uses an omnichannel tool/system that integrates multiple channels as well as functions (i.e., routing, analytics) to optimize performance and service quality.
REPORTING TOOL/ SYSTEM	A reporting tool/system is integrated with other contact center systems, providing real-time reporting on service levels and performance against targets, as well as highlighting opportunities for performance and quality improvement.

PART 3: CALCULATING AND ELEVATING YOUR AX MATURITY

If you haven't completed the maturity assessment, go back to Part 2.

On the following page, tally up your total and identify your current state based on the score ranges in the table. Capture your activity scores as well as your total on the gap analysis worksheet that follows, and then use it to prioritize your gaps, brainstorm actions to close the gaps, and set goals for completion.

ACTIVITY	Current Rating	Gap from Future State (5 – current rating)	Priority of Gap	Potential Effort (Low, Medium, High)	Type of Initiative (Strategic, Operational, Optimization)	Action(s) to Address Gap	Target Completion Date
Organizational Alignment							
Goals and Objectives							
Stakeholder Engagement							
Resource Allocation							
Job Descriptions							
Agent Satisfaction							
Agent Satisfaction Reporting							
Onboarding							
Ongoing Training							
Career Development							
Rewards and Recognition							
Retention							
Teamwork							
Workforce Management							
Performance Management							
Quality Assurance							
Feedback Management							
Continuous Improvement							
Service Level/Response Time							
Agent Metrics							
Contact Metrics							
Routing Tool/System							
Workforce Optimization Tool/System							
Omnichannel Mgmt Tool/System							
Reporting Tool/System							
TOTAL							

THE 5 STAGES OF AX MATURITY

0-20 points	21-40 points	41-60 points	61-80 points	81-100 points
Agent-Negligent	Agent-Chaotic	Agent-Aware	Agent-Centric	Agent-Champion

CLOSING THE GAPS

Getting from Agent-Negligent to Agent-Chaotic

Successfully breaking out of the Agent-Negligent stage typically requires a contact center leader and senior leadership that are bought into turning the ship around. With a strong background in operations, this leader will need to have both a clear strategy and the drive to overcome resistance. Agents in this stage often feel helpless or defeated, believing that they've been set up to fail. Rallying disengaged agents around the belief that progress can be made will take more than words. Outside resources and training may be needed to kick-start the process and generate quick wins to build positive momentum.

These quick wins may include:

- Develop a long-term plan and strategy for investing in AX.
- Creating a roadmap and a timeline for improving technology.
- Creating a business case for the necessary budget for training, tools, and staff.

Getting from Agent-Chaotic to Agent-Aware

Stuck in a perpetual state of reacting to everything, Agent-Chaotic contact centers want to become more Agent-Aware, but that requires having leaders who can advocate for and share the experience of the agent across the business, linking it to the customer journey and CX. Great managers in this stage are more confident with holding up the mirror to the organization, relating CX to AX to gain traction. Here are a few actions to advance to this stage:

- Establish a clear leadership structure designed to prioritize and support AX improvement efforts.
- Identify and address critical systems, processes, and tools that are making AX—and, by extension, CX—more challenging than it needs to be, building business cases to upgrade or replace accordingly.
- Hold regular team meetings and one-on-ones with agents, giving them a voice to provide feedback to drive quick win improvements while also leveraging insights from exit interviews.
- Encourage agents to share feedback and opportunities to improve CX, noting what obstacles need to be overcome that are within the team's control.
- Develop ongoing continuous improvement with onboarding and training initiatives using direct insight from agents, past and present, to help set future new hires up for success.

- Invest in identifying metrics and creating basic dashboards to gain better insight into the types of actions taken by agents and to implement quick self-service improvements to reduce repetitive and time-consuming requests.
- Provide agent with the opportunity to share customer feedback and their experience as agents in focus groups cross-functionally with key partners within the business relating efforts to improving CX.
- Enable at least limited integration of critical systems across the organization to facilitate the flow of essential information.

## Getting from Agent-Aware to Agent-Centric

Leveraging insights from agents more regularly, Agent-Aware contact centers see improved performance and satisfaction, but still need to embrace ideas consistently. There is an undeniable link between what frustrates agents and what also frustrates customers. The Agent-Centric organization has the culture and framework in place to support AX and CX, but they aren't yet functioning at a high level. Here are some recommendations to progress further into this stage:

- Foster an environment that embraces empowerment and eliminates wasteful tasks that fail to provide value.
- Invest in platforms and tools that scale efforts and prepare for future growth, positioning agents for long-term success by choosing systems that offload routine tasks, provide flexibility, and route contacts based on a thorough skills inventory.
- Learn where the pressure points are for your agents by holding "Start, Stop, and Continue" sessions. Commit to taking action and pursuing tangible improvements.
- Cross-train and upskill agents to strengthen skills. Develop structured onboarding and ongoing development programs, based on individual gap analysis and personalized training.
- Leverage advance tools that facilitate data collection, real-time analysis, and intelligent, proactive scheduling that ensures agents' needs are met while still providing adequate coverage across channels.
- Build a culture of coaching and invest in training/shadowing programs to provide career and development opportunities for agents.
- Establish a Voice of the Agent program to foster trust and open communication, using ongoing surveys, one-on-one conversations, and agent-focused metrics.

Getting from Agent-Centric to Agent-Champion

Climbing to the apex of AX maturity as a contact center requires a fully integrated strategy, culture, and tools. Organizations that are Agent-Champions have contact center teams that are renowned for high customer satisfaction and high agent engagement. For these organizations, engaged agents lead to engaged customers—the customer experience is a key competitive advantage, and so too is the agent experience. Achieving and sustaining success in this stage takes an ongoing commitment from all levels of leadership to identifying and investing in opportunities for improvement. Here are recommended actions to reach to the pinnacle of AX maturity:

- Contact center leaders have regular cross-functional meetings with key stakeholders and partners to ensure that joint business and objective planning efforts for new projects/initiatives account for both AX and CX.

- Invest in automation technology that can take care of routine requests, allowing agents to apply themselves to more complex, high-value interactions.

- Build out dashboards and reports that provide full transparency within the contact center.

- Implement flexible schedules that balance work and life as much as possible, inviting agents to share their preferences with how, when, and where they work best.

- Invest in your people through continuous learning and development programs, offering certifications, career advancement opportunities, and stretch project assignments.

- Make it easy for agents with all-in-one solutions, minimizing tools and screens required to support customers.

- Leverage metrics that enable more proactive ongoing improvement to AX, such as agent experience score.

- Invest in advanced analytics that capture agent feedback beyond surveys (e.g., sentiment, speech, predictive).

- Seek tools that employ the latest advancements
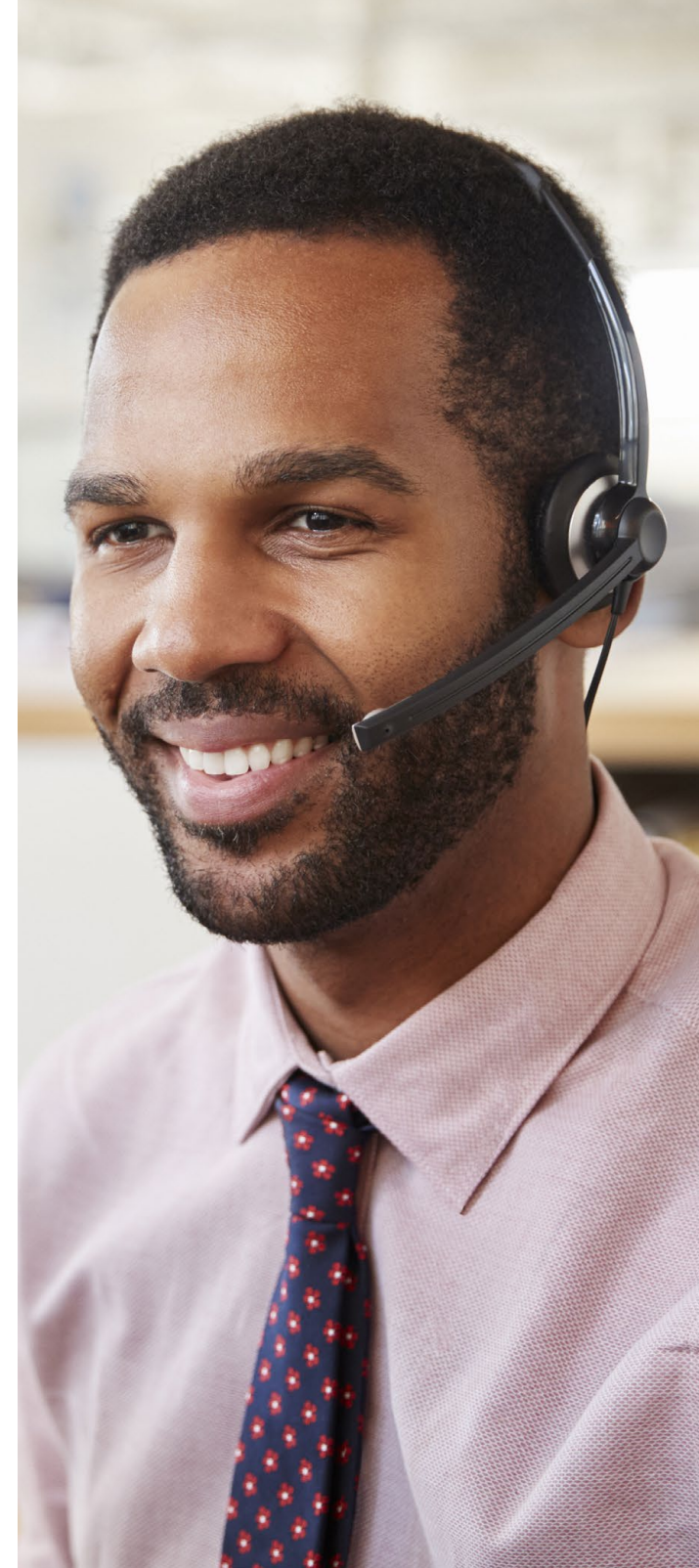
CONCLUSION

With so much attention on improving CX in contact centers in recent years, AX has often been either wholly unaddressed or poorly prioritized in many organizations. Considerable time and money have been invested creating unique and compelling customer experiences, without attending to agent experience. At its core, poor CX is often a symptom of poor AX.

For years, considerable research, activity, and investment have gone into improving CX in the contact center. However, it's now becoming clear that we may have prioritized CX to the detriment of AX. In the desire for increased efficiency, organizations thrust more responsibilities and expectations on agents, without stopping to reflect on how that might impact both AX and CX. After all, there's a direct line

between satisfied agents and satisfied customers. But for many contact center leaders, it's becoming more and more challenging to keep agents motivated and engaged while trying to retain them. In 57% of contact centers – as reported in our recent study, *The State of Agent Experience and Engagement in Today's Contact Centers* – agents are expected to handle multiple channels, and their biggest challenge (cited by 52% of respondents) is having to navigate multiple screens and interfaces. Frustrated and dissatisfied agents either leave the organization or, worse, check out mentally but stay, negatively impacting the customer experience. According to our study, 25% of agents left the company in the last 12 months. Given the high cost of both agent and customer attrition, it's more important than ever that contact center leaders attend to the agent experience.

Like CX, AX it's a continual process that requires ongoing refinement, continuous improvement, and crystal-clear priorities. Remember, the competition may be able to replicate your products or services, but they can never copy your greatest asset, advantage, and source of differentiation: your people. While customers are and always will be an essential part of the process, the journey to ultimate maturity and performance starts with being people-first.

Each step on the path to AX maturity must be taken in stride, deliberately and patiently. Create an engaging and compelling agent experience and the customer experience will follow.

Learn more about ICMI and NICE's latest research into agent experience!

Evaluate your customer experience maturity using this quick self-assessment!

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