

Use RPA To Deliver Better Customer Service Experiences

Where And How To Get Started Deploying RPA In The Contact Center

by Kate Leggett

November 6, 2019 | Updated: December 6, 2019

Why Read This Report

Robotic process automation (RPA) is a key component in the landscape of automation and AI technology for customer service operations. It bolsters agent productivity, increases process automation, and helps operations deliver differentiated experiences and uncover new revenue streams. RPA erodes repetitive work and boosts the need for superagents, new metrics, and new ways of managing an upleveled workforce. This report describes how customer service leaders benefit from RPA and how they can accommodate changing agent skills.

Key Takeaways

RPA Delivers Real ROI To Customer Service Operations

RPA is a tactical, short-term fix to digitize common, reproducible agent tasks. It overlays — and doesn't disrupt — existing contact center applications, which makes it easy to implement and realize value from.

Start Simple With Common Agent Tasks

Customer service organizations look to automate common rules-based tasks within processes that span multiple systems. Start with five simple agent tasks, and measure ROI as you go.

Realize That Agent Skills Must Change As Your RPA Matures

RPA won't automate agents away. It will actually make your workplace more attractive to agents, change the way they work, and force you to rethink your staffing and operational metrics.

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Related Research Documents

[Attended-Mode RPA: The Differences You Need To Know](#)

[RPA, DPA, BPM, And DCM Platforms: The Differences You Need To Know](#)

[The Three Customer Service Megatrends In 2019: As AI Eats Jobs, Agents Are More Valued](#)

[Use The Rule Of Five To Find The Right RPA Process](#)



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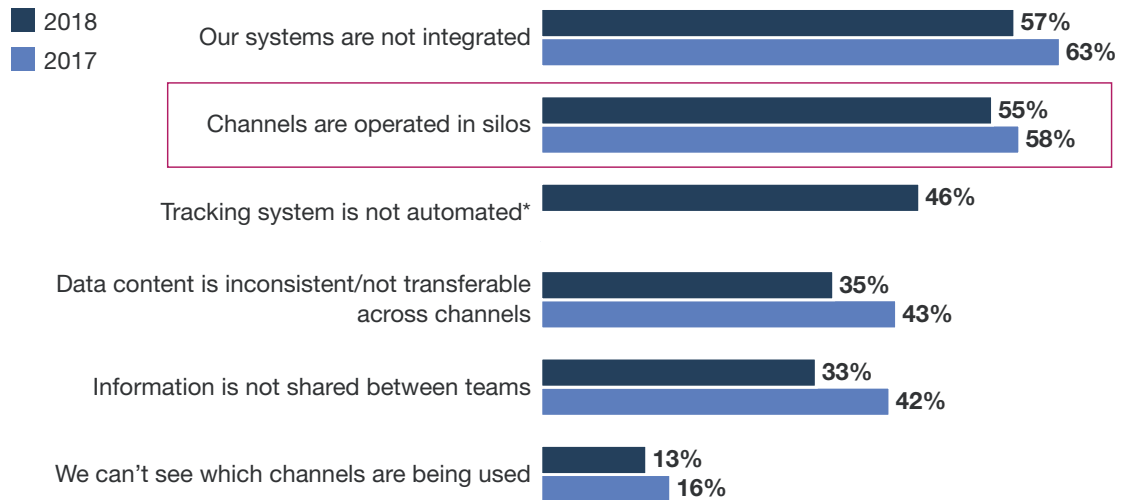
Technology Disconnects Conspire Against Customer Service Quality

Customer service organizations strive to empower agents with technologies that make them highly productive and focus them on the most important work. Yet, customer service leaders continue to struggle to deliver a quality of service that keeps customers engaged and loyal to the brand. They can't optimize interactions, process flows and decisions, or next best actions for more successful business outcomes that foster relationships and trust. This is because agents don't:

- › **Use a consolidated set of solutions for all interactions.** Fifty-five percent of contact center decision makers state that their channels operate in technology silos (see Figure 1). This means that transactional data and customer history are often neither consistent nor consistently available across communication channels. The result? Customers receive erratic service, which increases costs and decreases satisfaction.
- › **Follow consistent processes.** Customer service agents often use dozens of disconnected applications to resolve a single customer issue. They duplicate data from application to application or perform repetitive, manual tasks — actions that take up 15% of an agent's day.¹ Customer service leaders can't enforce standardized processes. Agents take a long time to get trained up on processes and applications, and they turn over quickly because of frustration with their toolsets.
- › **Have the right knowledge and data to answer customer requests.** In a study of how agents spend their time, [24]7.ai found that agents spend up to 35% of their days searching for information from a knowledge base or CRM system. The right knowledge and data help create personalized interactions, which lead to increased customer satisfaction, reduced contact times, improved operational efficiencies, and increased customer engagement — and ultimately drive conversion and revenue.²
- › **Comply with policy.** Regulations in industries such as financial services and healthcare are increasingly complex, and recent consumer privacy regulations like the EU's General Data Protection Regulation add yet more layers of complexity. Few real-time processes in customer service organizations audit agent actions against policy requirements, which results in higher service costs from penalties for noncompliance.

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FIGURE 1 Contact Centers Struggle With Unintegrated Systems That Can't Share Data**“What are the main challenges you face when attempting to track customer journeys?”**

Base: 681 customer experience decision makers

Source: Dimension Data 2019 Global Customer Experience Benchmarking Report

*New question in 2018

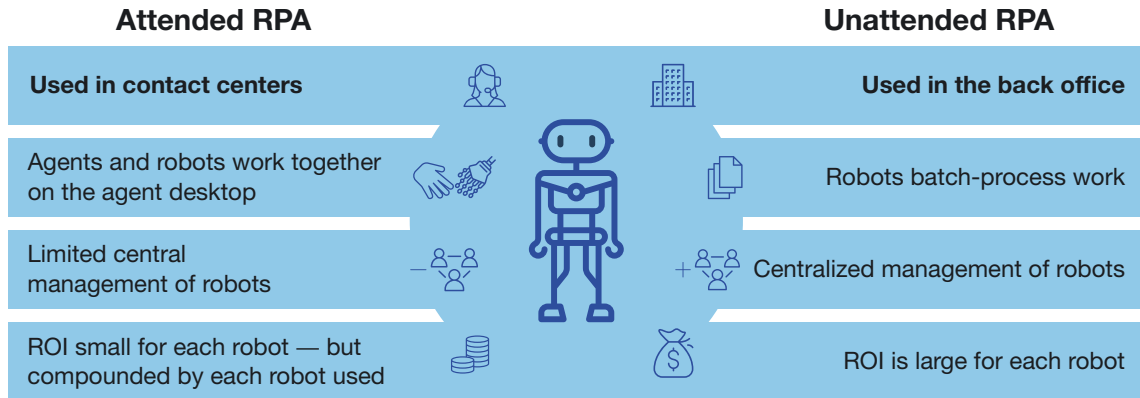
RPA Uplevels The Quality Of Customer Service Experiences

Customer service leaders recognize the importance of delivering customer service experiences in line with customer expectations to keep satisfaction rates high and churn rates low. They're increasingly turning to RPA.³ RPA is a tactical, short-term fix to digitize common, reproducible agent tasks. It quickly and easily extends the life of contact center apps. It's no surprise that 44% of data and analytics decision makers whose firms are adopting automation are already using customer service robots, and another 22% are planning to implement them in the next 12 months.⁴

There are two forms of RPA. RPA bots working in “attended” mode target the front office. They are invoked by agents in the flow of their work and improve their productivity and quality. Robots hand exceptions back to agents in real time. “Unattended” RPA bots, in contrast, autonomously execute scheduled back-office tasks, like claims processing or generating invoices, from a work queue.⁵ Customer service operations uses both types of RPA. An agent can start a task with support from attended automation, which can then kick off unattended RPA to finish the process (see Figure 2).

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FIGURE 2 Characteristics Of Attended RPA And Unattended RPA**RPA Delivers A Balanced Scorecard Of Improvements**

Customer service leaders use RPA to:

- › **Standardize and speed up agent work to better serve customers.** RPA automates agent tasks within manual, rules-based processes such as launching apps, cutting and pasting from different apps, and basic computations. This increases the consistency of agent actions and their throughput, and it makes ROI easy to quantify, as brands know what every second of their agents' time costs.

Unum, a provider of group disability insurance, automates repeatable tasks that collectively take 50% of an agent's time. For example, policy cancellations previously took three days from intake to completion and required work from multiple individuals. Now, Unum's policy cancellations take a single day, and it has reduced manual clicks from 80 to 11, which improves customer experiences.⁶

- › **Integrate applications to reduce errors and improve compliance.** Customer service agents use multiple front- and back-office applications, many of which are not API enabled. RPA allows rapid application integration without disrupting the underlying infrastructure. RPA robots also automate repetitive tasks that are prone to errors, which helps organizations deliver more accurate outcomes. And they reduce agent contact with sensitive data as well as maintain audit trails to enable detailed audits if issues arise.
- › **Uplevel employees' confidence so that they can better nurture customers.** RPA automates the repetitive, low-value tasks that interfere with core agent activities: call wrap-up tasks, call notes, and data entry. It also surfaces knowledge or data at the right steps in processes, so agents don't need to put customers on hold as they search for information. RPA allows agents to focus on adding customer value, solving customer problems, and strengthening customer relationships.

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For example, a large bank uses RPA to automate tasks in fraud investigations. Since deployment, employee satisfaction has skyrocketed, as agents spend more time on meaningful work. The bank has also upskilled agents or moved them to positions where they have more impact on the business.⁷

- › **Speed up agent work to improve customer experiences.** RPA robots can perform tasks four to five times faster than agents, streamlining inquiry capture and resolution and improving handle times and service-level agreements (SLAs) to take contact center operations to the next level.

A global electronics and consumer goods retailer used RPA to reduce average handle time by 12%, hold times by 22%, and silent time by 20%.⁸

- › **Deliver actionable business insights to better align with customer expectations.** RPA reduces manual errors, which translates to the collection of higher-quality data. In addition, RPA robots interact with legacy systems to uncover data that was previously too labor intensive to extract. This enables organizations to mine broader and more reliable data sets to reveal new insights. Companies can use these insights to create and monetize completely new services for customers.

Telefónica Spain used RPA to automate manual processes for its fixed-line and mobile customers, which reduced handle time. This directly impacted customer satisfaction and led to a total cost savings of €3 million within 24 months. One side benefit? Telefónica Spain became more agile — and was able to offer new products and services more quickly — which allowed it to win in a highly competitive market.⁹

Create A Heat Map To Identify Key Areas Of Impact For RPA

It's rare to begin and scale an unattended RPA automation program on a critical mass of back-office processes in the contact center. As a first step, most contact center organizations scour their agent desktops for process automation opportunities. Start with high-volume, rules-based, standardized processes that cross multiple systems with UIs that don't change frequently. Mine call reports to find top contact drivers. Examine training guides and contact center procedural documentation to identify complex manual tasks that agents must follow (see Figure 3).

Just because a process or task is tedious doesn't mean it's a good candidate for automation. Enterprises should consider the total amount of time per week, per month that the process takes and how much headcount they devote to it. In addition, instead of only looking at end-to-end customer service processes, contact center leaders should also look at common tasks within highly divergent processes (see Figure 4).

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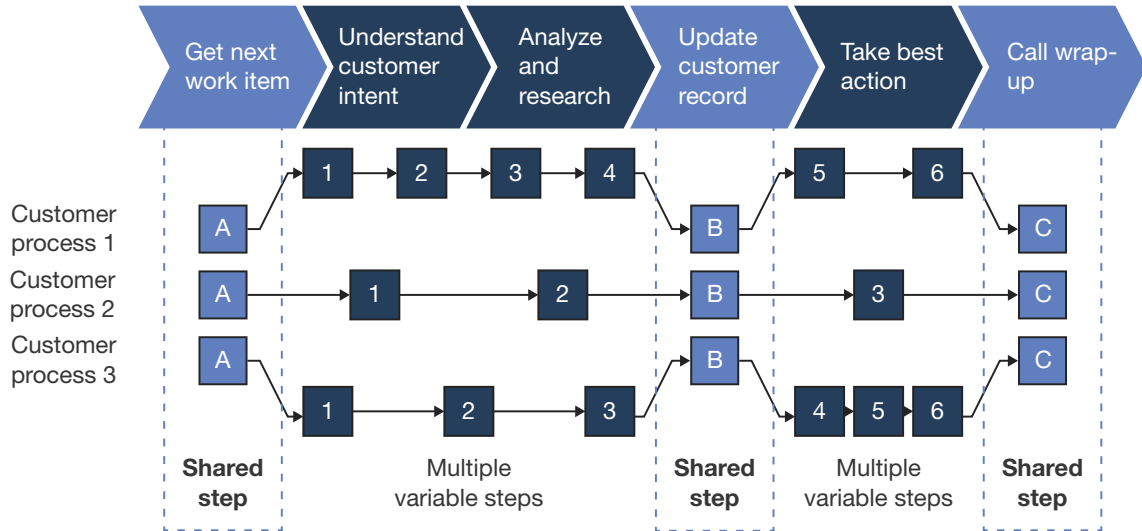
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FIGURE 3 Examine Agent Actions To Find Candidates For RPA

Agent action	Benefits of RPA
Put customer on hold	<ul style="list-style-type: none"> • Increases contact quality • Standardizes processes to increase agent confidence
Launch several applications during call setup	<ul style="list-style-type: none"> • Decreases agent workload and burnout • Increases agent productivity and time-to-proficiency
Follow repetitive actions within an application	<ul style="list-style-type: none"> • Standardizes quality of care • Increases agent productivity and time-to-proficiency
Cut and paste between applications	<ul style="list-style-type: none"> • Decreases error rates • Increases compliance
Use Excel worksheets or calculators	<ul style="list-style-type: none"> • Decreases error rates • Increases compliance
Use sticky notes, policy documents, or knowledge base	<ul style="list-style-type: none"> • Increases agent confidence with proactive knowledge and content delivery • Increases cross-sells and upsells
Request supervisor approval for decisions on certain call types	<ul style="list-style-type: none"> • Streamlines compliance • Increases contact quality
Spend time on call wrap-up activities	<ul style="list-style-type: none"> • Increases agent productivity and engagement • Increases accuracy in contact provisioning

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FIGURE 4 Look For Shared Steps In Highly Divergent Processes To Automate With RPA

Source: Content is courtesy of Jacada.

Use These Five Tenets As You Deploy RPA In Customer Service

Attended RPA bots have the most value automating tasks within processes. They're not the solution for redesigning and automating complete end-to-end business processes that are at the heart of a real transformation. Yet, when you use it appropriately, RPA has a solid place delivering tangible outcomes. To get the most value out of your RPA projects in the contact center:

1. **Think small and simple when choosing candidates for assisted RPA.** One great benefit of RPA is that it doesn't need APIs. Instead, RPA works through existing desktop applications to mimic human interactions with machines. This approach has benefits and limitations. Follow Forrester's rule of five: five decisions, five applications, and 500 clicks to pinpoint the right candidates.¹⁰ Remember that bots are vulnerable to application changes, so choose applications that don't change frequently and tasks that don't change seasonally.
2. **Prioritize five contact center tasks to automate.** Focus on straightforward opportunities contained within the agent desktop that quickly demonstrate the value of RPA. You can also contain these projects within the contact center and not require buy-in from other stakeholders.

For example, prioritize up to five key initial tasks to automate in the first sprint cycle. This first sprint may achieve a small but measurable reduction in call handle times. Subsequent sprints should build on these benefits. If it becomes apparent that you're not achieving the desired value, don't invest more time to make automation more successful; be agile, and move to the next process.

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- 3. Audit processes and applications before automating them.** Your overall goal should be to evaluate how to make contact center tasks and processes more effective and efficient. You can automate poor processes, but it's better to improve them first. However, while automating a bad process doesn't make it better, it may make it less expensive to execute in the short term. It also extends the life of legacy technology, but this approach can ultimately be less effective than modernizing applications. Take time to review and streamline tasks, processes, and applications prior to embarking on an RPA project.
- 4. Calculate and measure ROI at every step.** Each attended RPA bot delivers a small productivity gain, but when you multiply it by the number of agents that use each bot, you quickly realize cost savings.¹¹ Your contact center will have higher throughput with better SLA adherence. RPA allows firms to onboard agents more quickly and deliver higher quality of service, which impacts customer satisfaction, retention, and ultimately, revenue — facets that 85% of customer service information workers say that they fail to capture in their ROI calculations.¹² Quantifying ROI as you expand your RPA footprint will give you leverage as you broaden your automation efforts.
- 5. Get your agents onboard.** An often-overlooked element of RPA projects is that for a frontline customer service agent, *AI* and *automation* are scary words. In fact, only 19% of global information workers agree that their companies have shown concern for how these technologies affect their overall employee experience.¹³ Invest in proper change management plans.

Communicate the benefits of working side by side with RPA to agents — less repetitive work and more opportunity to better relate to customers — before, during, and after the RPA project. Enlist agents to be integral parts of the automation project, and enable them to help identify tasks to automate and test automations. Some will act as change agents within their teams to get support and buy-in for new ways of working. These change agents will also raise issues and communicate worker reactions to the RPA project leader.

What It Means

Prepare For Agent Skills To Shift In RPA-Enabled Contact Centers

The contact center is a great workspace for RPA. The applications that agents use are precisely controlled as the scope of RPA broadens to handle more tasks within the contact center and agents increasingly focus on value-added work, escalations, and exceptions. Customer service leaders should be prepared for the following workforce changes in the next five years:

- › **RPA will not reduce headcount; it will just make your agents more effective.** Consumers are contacting customer service more often, over a greater number of channels, than in the past. They are also quickly adopting the channels they use elsewhere — like Facebook Messenger, Instagram, WeChat, and SMS — for customer service interactions. Forrester Analytics shows that 46% of global contact center decision makers project the number of agent seats to grow by 5% to 10% next year; 16% project growth of more than 10%.¹⁴

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RPA allows organizations to keep up with ballooning interaction volumes by automating basic task work for every agent. This strategy preserves a high quality of service, and it will not eliminate large swaths of agents.

- › **RPA will focus agents on tasks that impact customer relationships.** Companies are releasing new products and services with more complex features more than ever before. Frontline contact center agents take the brunt of the burden of change. RPA allows them to offload repetitive tasks so they can focus on upleveling their skills and nurturing customer relationships. Beware that empathy burnout should be a major concern, and contact center managers must plan for longer breaks and more varied work for their agent workforce.
- › **RPA will make your workplace more attractive to new superagents.** You can train and uplevel RPA-supported agents more quickly and turn them into highly effective, highly knowledgeable superagents. One side benefit of automation is that over time, it reduces the speed at which companies hire for growth. RPA allows teams to be more productive. This means that managers oversee smaller teams staffed with better skilled, more effective, and more satisfied agents. Managers focus on nurturing their workforces, ultimately reducing churn and making their workplaces more attractive to new hires.
- › **RPA will make you adjust your staffing.** Reducing interaction handle time will affect workforce planners' ability to forecast and schedule your agents. And this will continue as automation improves and as queries become more complex and take longer to resolve. However, only 13% of customer experience services provisioners report that their workforce optimization practices have been impacted by RPA; this percentage is sure to grow as more customer service organizations adopt RPA more broadly.¹⁵
- › **RPA will make you rethink your metrics.** Customer service issues are getting longer and more complex, and superagents are required to provide high-touch, empathy-driven customer service. In this reality, is average handle time really the best metric for driving your organization's approach to service? Instead, start to balance your efficiency-focused metrics with customer-experience- and outcome-focused metrics.

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Supplemental Material

Companies Interviewed For This Report

We would like to thank the individuals from the following companies who generously gave their time during the research for this report.

Concentrix

Pegasystems

Jacada

Verint

NICE

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Endnotes

¹ Source: [24]7.ai.

For more information on how customer service leaders struggle to effectively support their agents as the nature of customer interactions changes, see the Forrester report [“How To Build A Modern Agent Desktop And Transform Customer Service Experiences.”](#)

² Source: [24]7.ai.

³ See the Forrester report [“Win Funding For Your Customer Service Project.”](#)

⁴ Base: 3,040 data and analytics decision makers whose firms are adopting automation. Source: Forrester Analytics Global Business Technographics® Data And Analytics Survey, 2019.

⁵ Forrester defines attended RPA as “automation that interacts in real time with humans who initiate and control robot tasks; often embeds functions within apps; and associates with front-office, agent-led activities.” Forrester defines unattended RPA as “automation that replaces a complete human function in a lights-out, batch-oriented manner; creates a virtual workforce; and, generally, associates with back-office activities.” See the Forrester report [“Attended-Mode RPA: The Differences You Need To Know.”](#)

⁶ Source: “Unum automates processes to improve customer experience and employee engagement,” Pegasystems video (<https://www.pega.com/customers/unum>).

⁷ Source: “Advanced Process Automation: Setting New Standards of Service in Front & Back Office Operations,” NICE (<https://www.nice.com/websites/rpa/assets/NICE-Robotic-Automation-Case-Studies-Ebook.pdf>).

⁸ Source: Concentrix.

⁹ Source: “Advanced Process Automation: Setting New Standards of Service in Front & Back Office Operations,” NICE (<https://www.nice.com/websites/rpa/assets/NICE-Robotic-Automation-Case-Studies-Ebook.pdf>).

¹⁰ Fewer than five decisions, five apps accessed, and 500 clicks are safe territory for RPA success. See the Forrester report [“Use The Rule Of Five To Find The Right RPA Process.”](#)

¹¹ RPA bots in a contact center will add smaller productivity gains, but to hundreds, if not thousands, of agents. See the Forrester report [“Attended-Mode RPA: The Differences You Need To Know.”](#)

¹² Only 15% of customer service information workers agreed with this statement: “We are measuring how automation technologies improve the experience of our customers.” Source: Forrester Analytics Global Business Technographics Workforce Benchmark Recontact Survey, 2018.

¹³ Source: Forrester Analytics Global Business Technographics Workforce Benchmark Recontact Survey, 2018.

¹⁴ Source: Forrester Analytics Global Business Technographics Networks And Telecommunications Survey, 2019.

¹⁵ Source: Dimension Data 2019 Global Customer Experience Benchmarking Report.

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