CCW CUSTOMER CONTACT WEEK DIGITAL

MARCH 2020
MARKET STUDY

STATE OF
CONTACT CENTER
TECHNOLOGY

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CCW DIGITAL MARKET STUDY: THE STATE OF CONTACT CENTER TECHNOLOGY

It is not enough to *believe* in customer centricity. It is not enough to want to create more engaging experiences. Success only comes when you deliver an exceptional experience regardless of when, where and why customers choose to connect.

If customer-centric action - not rhetoric - is your call, it is imperative to take a similarly assertive stance toward contact center technology. Success comes not from *admiring* technological capabilities from afar but *implementing* solutions to solve key customer experience challenges and unlock unparalleled business opportunities.

Featuring exclusive research, analyst insights and real-world case studies, this Market Study aims to empower action rather than admiration when it comes to technology.

Instead of reciting market copy about exciting new solutions, it identifies the specific problems that contact centers can solve with new technology. It also explores the factors that risk preventing even the most elaborate, well-intentioned technology investments from driving meaningful results.

Over the course of this report, we'll review the most urgent contact center objectives, uncover the ripest opportunities for technology, discuss the most inhibitive contact center challenges and address the factors that matter most when considering new tools.

We'll then dive deep into a variety of use cases, including analytics, security, omnichannel engagement, automation and more.

Welcome to The State of Contact Center Technology.

METHODOLOGY & DEMOGRAPHICS

To collect data for this report, CCW Digital surveyed contact center, marketing, customer experience, information technology, operations and C-suite professionals from November 2019-January 2020.

Example respondent job titles included chief executive officer, director of call center operations, vice president of client operations, online relationship manager, director of client experience, senior vice president of the contact center, customer experience manager, senior vice president of enterprise patient operations, head of customer experience design, IT manager, chief operating officer, director of customer care, director of training and development, director of IT services, deputy chief of public service, vice president of card services, vice president of marketing, and senior vice president of eBranch.

The respondent pool encompasses organizations of all sizes and contact center dynamics.

More than 42% employ over 2500 individuals, but 20% have fewer than 250 staff members. More than 41% say they have at least 4 contact center sites, but 29% have only one.

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Brian Cantor is the principal analyst and director for CCW Digital, the global online community and research hub for customer contact professionals. In his role, Brian leads all customer experience, contact center, technology and employee engagement research initiatives for CCW Digital's series of reports. CCW Digital's articles, special reports, commentaries, infographics, executive interviews, webinars and online events reach a community of over 150,000.

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

KEY FINDINGS

1 As contact centers explore new technology, they are mindful of their top objectives for the next few years: reducing customer effort, achieving consistency across all touch points, proactively resolving customer needs, collecting great customer insights, and increasing self-service usage.

2 Contact center technology decisions still, by and large, run through the IT department. IT influences purchasing in 83% of companies; contact center leaders carry that influence in 74%.

3 Other key influencers include the C-suite (73%), operations team (62%) and overall "customer experience" function" (61%).

4 The top contact center improvement areas include using AI for analytics, customer engagement and/or process automation and mapping (let alone orchestrating) customer journeys.

5 Factors inhibiting success include the lack of a 360-degree view, bottlenecks from legacy systems, misalignment between different channels, misalignment between enterprise systems, and inadequate analytics.

6 When evaluating technology, reducing customer effort represents the #1 priority for contact centers. Other priority concerns include increasing quality, improving operational efficiency, reducing agent effort, and optimizing customer relationships and journeys.

WHY RETHINK CONTACT CENTER TECHNOLOGY

Design-minded contact centers do not invest in technology for technology's sake. They do not admire the theoretical capability of new systems.

Instead, they focus on tools and platforms that matter. They invest to solve real problems and achieve real objectives.

In the spirit of this purposeful approach to technology, it is prudent to review the top contact center objectives for the next few years. An understanding of these objectives will reveal where existing practices (and existing technologies) are failing contact centers -- and where the right technology can make a powerful impact.

According to CCW Digital's Market Study on the Contact Center of 2025, the **#1 objective is reducing customer effort**. Companies recognize the frustration of conventional customer experiences, and they are wholeheartedly committed to eliminating this pain moving forward. They, above all, want to make it easy for customers to connect.

Achieving consistency across all touch points is the #2 contact center objective. Buying into the omnichannel revolution, companies hope to deliver the same caliber of experience -- with the same commitment to reducing

effort and increasing value -- no matter where the customer chooses to connect. No, a messaging experience may not precisely mirror a voice experience, but it should *never* feel like it is coming from a different brand.
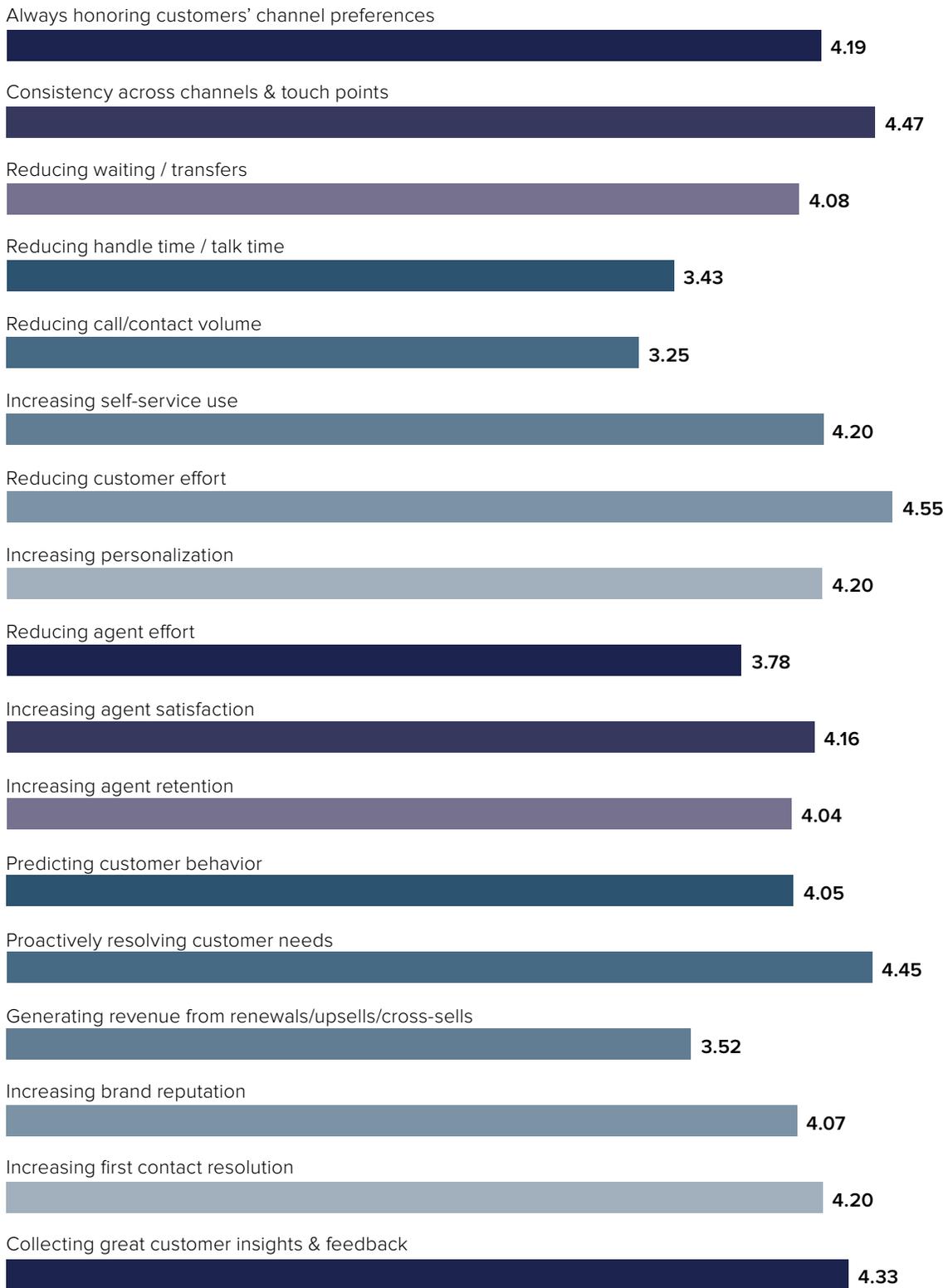
Other key objectives include **proactively resolving customer needs (#3), collecting great customer insights (#4)** and **increasing self-service usage (#5)**.

Companies want to make the support process easier, and what could be more frictionless than a proactive solution?

Great customer insights will fuel *all* relevant customer contact objectives. By revealing what customers want and what they experience in pursuit of that "intent," they help companies reduce effort, increase personalization, anticipate needs, and proactively resolve problems. Indeed, insights are the ticket to the coveted frictionless, personalized, predictive and proactive (FP3) experience.

Increasing the power of self-service will simultaneously make the engagement process more convenient and more consistent. Customers will be able to solve problems on their own terms -- without sacrificing quality.

How important will the following contact center objectives be five years from now?

Always honoring customers' channel preferences
4.19

Consistency across channels & touch points
4.47

Reducing waiting / transfers
4.08

Reducing handle time / talk time
3.43

Reducing call/contact volume
3.25

Increasing self-service use
4.20

Reducing customer effort
4.55

Increasing personalization
4.20

Reducing agent effort
3.78

Increasing agent satisfaction
4.16

Increasing agent retention
4.04

Predicting customer behavior
4.05

Proactively resolving customer needs
4.45

Generating revenue from renewals/upsells/cross-sells
3.52

Increasing brand reputation
4.07

Increasing first contact resolution
4.20

Collecting great customer insights & feedback
4.33

NOT JUST A CONTACT CENTER FOCUS

Upon identifying their key objectives, contact center leaders will develop a vision for their technology investments.

They are not the only ones creating this vision. The contact center team, in fact, only influences or directs purchasing in 74% of companies. Indeed, roughly one-quarter of companies purchase contact center technology without meaningfully involving the contact center team.

IT leaders actually carry more widespread influence when it comes to technology decisions. They drive contact center purchasing in 83% of organizations.

Other key decision makers include the C-level (73%), the operations team (62%), and the broader customer experience team (61%).

On the one hand, the statistics confirm an admirable reality: customer contact *is* a company-wide focus. Other departments are not leaving the contact center on an island; they are thinking about how to invest for success.

On the other hand, it is concerning that some companies are minimizing the contact center team's influence on the

purchasing process. Why would 26% of organizations make decisions without consulting the people who are using the technology? Why would they be more inclined to listen to teams with no direct involvement in the work?
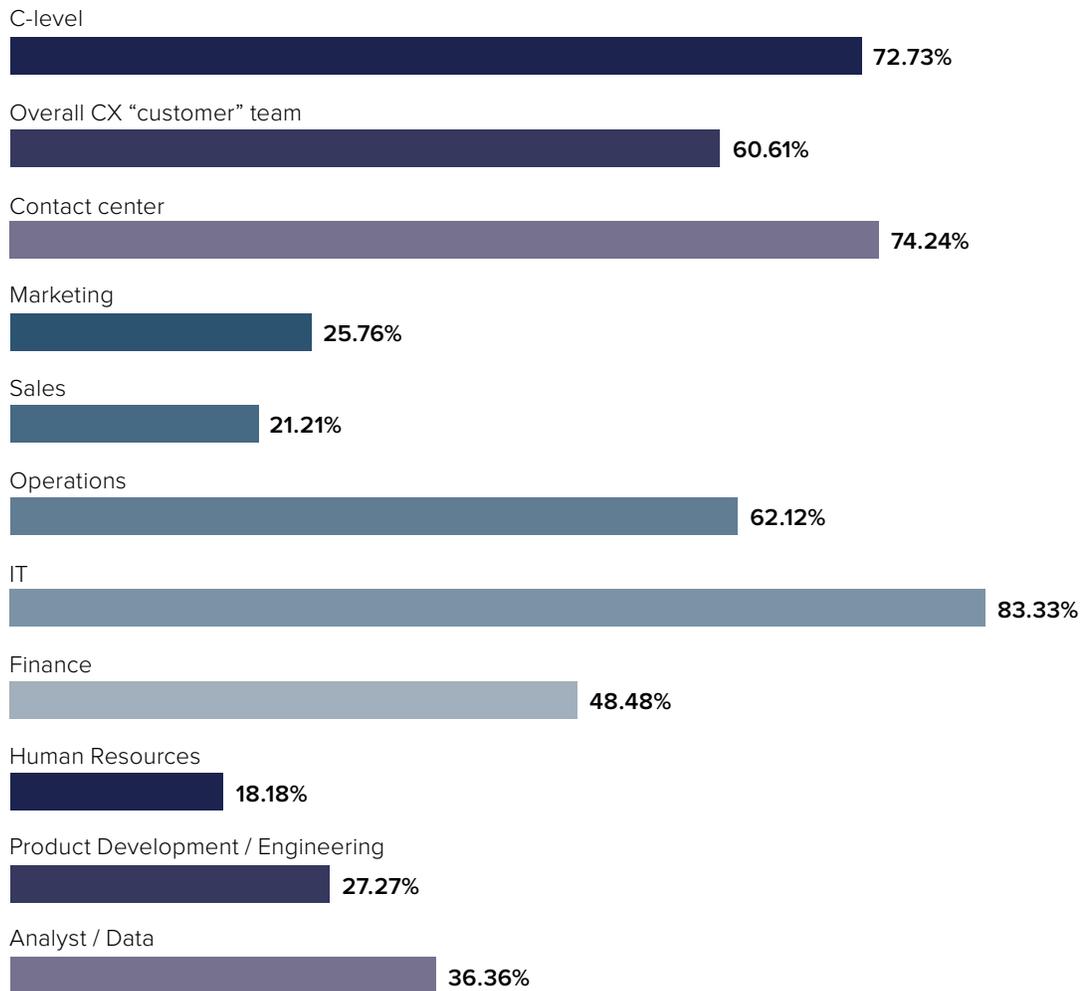
These questions *should* spur change. They *should* inspire organizations to let contact center leaders dictate their own fate and drive their own investments.

It would nonetheless be irresponsible to expect this change to happen overnight -- or on its own. It is up to the contact center community to make the internal case for more influence.

It, moreover, is up to the contact center team to help the other stakeholders understand what matters. Aware that IT and C-level leaders will likely be involved no matter what, contact center leaders need to make sure these groups understand the key needs, pain points, and opportunities.

This data, ultimately, is another case for breaking down interdepartmental silos.

Which departments have meaningful influence over contact center technology decisions?

C-level
72.73%

Overall CX "customer" team
60.61%

Contact center
74.24%

Marketing
25.76%

Sales
21.21%

Operations
62.12%

IT
83.33%

Finance
48.48%

Human Resources
18.18%

Product Development / Engineering
27.27%

Analyst / Data
36.36%

WHERE TECHNOLOGY CAN MAKE AN IMPACT

In an ideal world, technology *empowers* contact centers. It provides businesses, and their agents, with efficient and effective ways to support customers. It allows them to deliver experiences they once viewed as impossibly elusive.

Today's contact centers, unfortunately, do not exist in an ideal world. They exist in one for which technology is not yet solving the most pressing problems. Worse, technology may actually be making matters worse.

An investigation into these shortcomings and unfortunate consequences is an important one, as it reveals the biggest opportunities for using technology. Companies that prioritize these gaps when sourcing, implementing, and managing technology will make the most of their investments.

This journey into the biggest challenge areas begins with automation. In the status quo, only 3% believe they are very successful at using artificial intelligence and/or automation technology to analyze customer data.

Confirmed by its standing as one of the top contact center objectives, *knowing customers* is the undeniable key to elevating the experience. Without artificial intelligence, contact centers cannot dive deeply into the totality of their interactions across channels. They may be able to extract basic survey feedback, but they cannot map and assess the nuances of customer demands and engagement journeys. They, in turn, cannot deliver optimal experiences.

Organizations are not, however, simply failing to leverage automation for analytics. Only 5% of organizations believe they are very successfully using AI for customer interactions, which means the overwhelming majority are not making the most of solutions like chatbots, smart IVRs, and intelligent routing platforms. They are squandering an incredible opportunity to create more convenient experiences, reduce customer and agent effort, and boost the value of interactions.

Not simply a problem on the frontend, AI is also a struggle area behind-the-scenes. Just 8% of companies believe they are very successful at using AI to improve operational performance. Not only does this shortcoming have a *direct* impact on efficiency; it is arguably the most disappointing. Since automation is more established for processes than it is for customer interactions, contact centers have less justification for struggling in this area.

Success on the AI front is proving *most* elusive, but it is not the only challenge area for today's contact centers. Fewer than 10% of today's companies, for instance, are actively managing customer journeys.

Only 8% confirm a successful ability to orchestrate journeys. This shortcoming is, of course, hardly surprising given that only 9% believe they are successfully *mapping* such journeys.

Journey mapping is by no means a foreign concept; previous CCW Digital research confirms that roughly two-thirds of organizations map their customer journeys.

And without gathering useful journey maps that identify key pain points, track sentiment and uncover customer intent, few organizations have the power to improve these journeys for customers. Knowing where the journey is going off course, after all, helps contact centers right the ship.

Is your contact center very successful at the following?

AI/automation for customers (chatbots, routing, etc)
4.55%

AI/automation for operations and agents
7.58%

AI/automation for analytics
3.03%

Voice of the customer / customer analytics
15.15%

Omnichannel communication
13.64%

Knowledge management
21.21%

Real-time quality management
21.54%
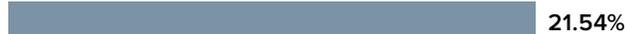
Real-time agent performance management
34.85%

Authentication/fraud prevention
36.36%

Customer journey mapping
9.09%

Customer journey orchestration
7.58%

Understanding customer intent
18.18%

Understanding customer effort
21.54%

CRM / managing customer data
27.27%

DEEPER BARRIERS TO SUCCESS

It is easy to lament over the impact of the aforementioned struggle areas -- as well as the many other challenges found in contact centers around the globe. It is easy to create a "wishlist" of the capabilities and functionalities we hope to achieve.

Determining how to close operational gaps is a far more difficult task. It is also a far more meaningful one.

In order to take action, it is important to understand *why* experiences are imperfect. Why are objectives as theoretically straightforward as "reducing effort" and "being consistent" still eluding so many organizations? Why are so few organizations content with their ability to map journeys or leverage automation technology?

With these answers, companies will not simply know which technology can conceivably solve their problems. They will also know how to evaluate and manage their investments to ensure they are paying for practical outcomes rather than theoretical features.

In the status quo, one of the most pressing challenges concerns the lack of a 360-degree view. A whopping 53% of companies, just about all of which understand the importance of the omnichannel revolution, confirm an absence of this cross-channel view of the experience.

Whether due to factors like incompatible systems, operational silos, or a fragmented customer experience ideology, organizations do not have rich insight into how their customers are navigating the journey. They cannot recognize customers who move between channels, let alone understand the pain these customers experience during their transitions.

Not simply a strategic weakness, this lack of a 360-degree view impacts real-time agent performance. Without a vivid view into the channels they are covering and customers they are supporting, agents will struggle to make connections. They will endure undue effort and frustration as they pursue information about customers, leading to experiences that are slower and less personal.

Although it is not the near-universal challenge it once was, the limitation of legacy systems remains a common point of frustration. Forty-four percent (44%) of companies say legacy platforms prevent them from improving their technology.

Unable to scale systems, improve performance, connect new channels and platforms, or implement AI-driven enhancements, it should come as no surprise that so many organizations are *struggling* to master key contact center objectives. Achieving a 360-degree view of the experience, for example, is literally impossible when a contact center cannot seamlessly add support for new channels or improve data collection and reporting.

Legacy systems also contribute to another internal pain point: insufficient integration across channels. Forty percent (40%) say they are unable to connect their different channels, which adds fracture points to the experience journey. For customers, this means facing delays, repeating information, and even reaching dead-ends during the engagement process. For the business, this means enduring inefficiency while also losing the ability to build customer relationships.

Remember the point about only 9% of companies successfully mapping their customer journeys? Legacy systems that do not integrate with other platforms are definitely part of the problem!

The integration woes are not limited to contact channels; about 39% of companies are also struggling to integrate contact center solutions with broader enterprise systems.

Given that the experience spans beyond the contact center function, this limitation surely impacts overall operational performance. Contact centers will not be able to leverage *enterprise* resources to manage the workforce and workload,

while the other departments will be unable to leverage valuable customer insights when performing their work.
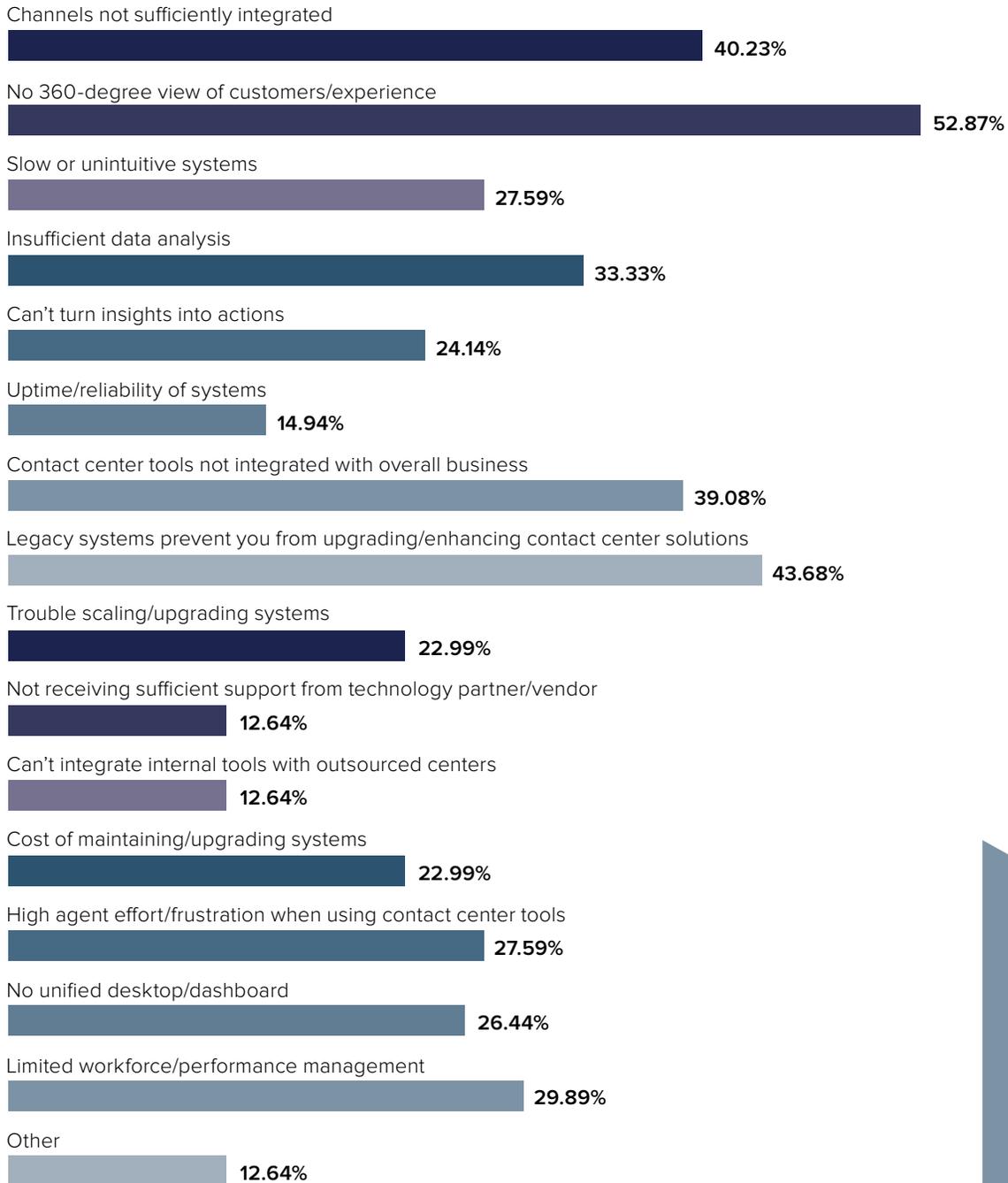
Without actionable customer insights, how can marketing properly craft its messaging? Without data on support interactions, how can the product team fix design flaws?

Another widespread issue -- one for 33% of contact centers -- concerns a lack of effective data analysis. Whether related to an inability to gather customer and agent insights *or* an inability to properly access reports from contact center systems, this gap greatly stunts the evolution of the experience. Great data impacts everything from agent training, to technology purchasing, to service design. Without it, companies are doomed to deliver stereotypically slow, impersonal experiences.

Is it any surprise CCW Digital's Consumer Preferences Survey reveals that only 12% of customers have witnessed *meaningful* improvements to their brand experiences over the past few years?

Does your contact center/cx function face any of the following challenges?

Channels not sufficiently integrated
40.23%

No 360-degree view of customers/experience
52.87%

Slow or unintuitive systems
27.59%

Insufficient data analysis
33.33%

Can't turn insights into actions
24.14%

Uptime/reliability of systems
14.94%

Contact center tools not integrated with overall business
39.08%

Legacy systems prevent you from upgrading/enhancing contact center solutions
43.68%

Trouble scaling/upgrading systems
22.99%

Not receiving sufficient support from technology partner/vendor
12.64%

Can't integrate internal tools with outsourced centers
12.64%

Cost of maintaining/upgrading systems
22.99%

High agent effort/frustration when using contact center tools
27.59%

No unified desktop/dashboard
26.44%

Limited workforce/performance management
29.89%

Other
12.64%

ESTABLISHING TECHNOLOGICAL PRIORITIES

The data confirms that there are -- or, at least, should be -- some universal priorities when it comes to technology purchasing.

Organizations should look for scalable, cloud-based technology that easily integrates with other platforms. They should emphasize solutions that collect and share rich, actionable customer insights across all channels. They should seek solutions that leverage automation to simultaneously improve quality and maximize efficiency.

Savvy contact center buyers do not, however, focus merely on these core features -- or any static capabilities, for that matter. They instead focus on what the technology will *mean* for their customer contact operation.

It is with this barometer that a contact center can choose between two platforms that, on paper, promise the same "ability to use AI to create an omnichannel experience." It is with this barometer that a contact center decision-maker will purchase a system that is right for them rather than one that is merely solid for the masses.

Not simply a "purchasing checklist," this rubric also fosters effective collaboration between the various stakeholders. It is how the customer experience team can convince IT to "think like a contact center person" when evaluating new

systems. It is also a de facto request-for-proposal, urging solution providers to innovate based on demand rather than capability.

So what does this rubric entail?

Above all, it involves the impact on customer effort. With an importance scale of 4.27 (on a scale of 0-5, with 0 being "very unimportant" and 5 being "very important"), customer effort is the most important factor brands are considering as they evaluate future technology solutions.

Although companies want to make life easier for customers, they know they cannot sacrifice quality. Indeed, quality is a very close second on the priority list -- its importance score is 4.26.

Other key focuses include an impact on operational efficiency (4.21), an impact on agent effort (4.17), and an impact on customer relationships and journeys (4.06).

Not simply aligned with core contact center goals, each focus speaks to some notorious mistakes associated with contact center purchases.

Companies, for example, have *constantly* ignored the impact on customer effort when purchasing supposedly "pro-customer" technology. The stereotypical IVR bounces

the customer around a circular maze of unhelpful, robotic messaging, clearly creating more frustration (and taking more time) than the customer would have faced by simply waiting on hold for a live agent. Many self-checkout kiosks have limitations that force customers to wait for "employee assistance." Digital, interactive restaurant menus are rarely as simple as asking the waiter or cashier for the item.

And even if these examples of self-service technology do perform efficiently, they may not meet relevant quality standards. Some chatbots and digital engagement tools help brands quickly process transactions in new media, but they do not allow the company to handle complex issues or demonstrate a "human" touch. If those personal factors are relevant to the customer and/or issue in question, the supposedly beneficial technology is yielding a lower-quality experience.

Granted, some companies *do* emphasize customer effort and values when purchasing technology. The problem, however, is that they ignore the agent experience.

A feature-rich new CRM platform may provide an unparalleled look at all customers. This upgrade is for naught, however, if agents cannot readily access data on demand. If they have to spend minutes accessing different screens and platforms to find the relevant information -- and then spend more time reporting on their calls -- they will be unable to perform efficiently. This will create a negative cost for both customers and the greater business.

Worse, this additional agent effort will lead to frustration. Agents will be angrier (and thus less pleasant) with customers in the short term and more likely to depart the brand in the long term.
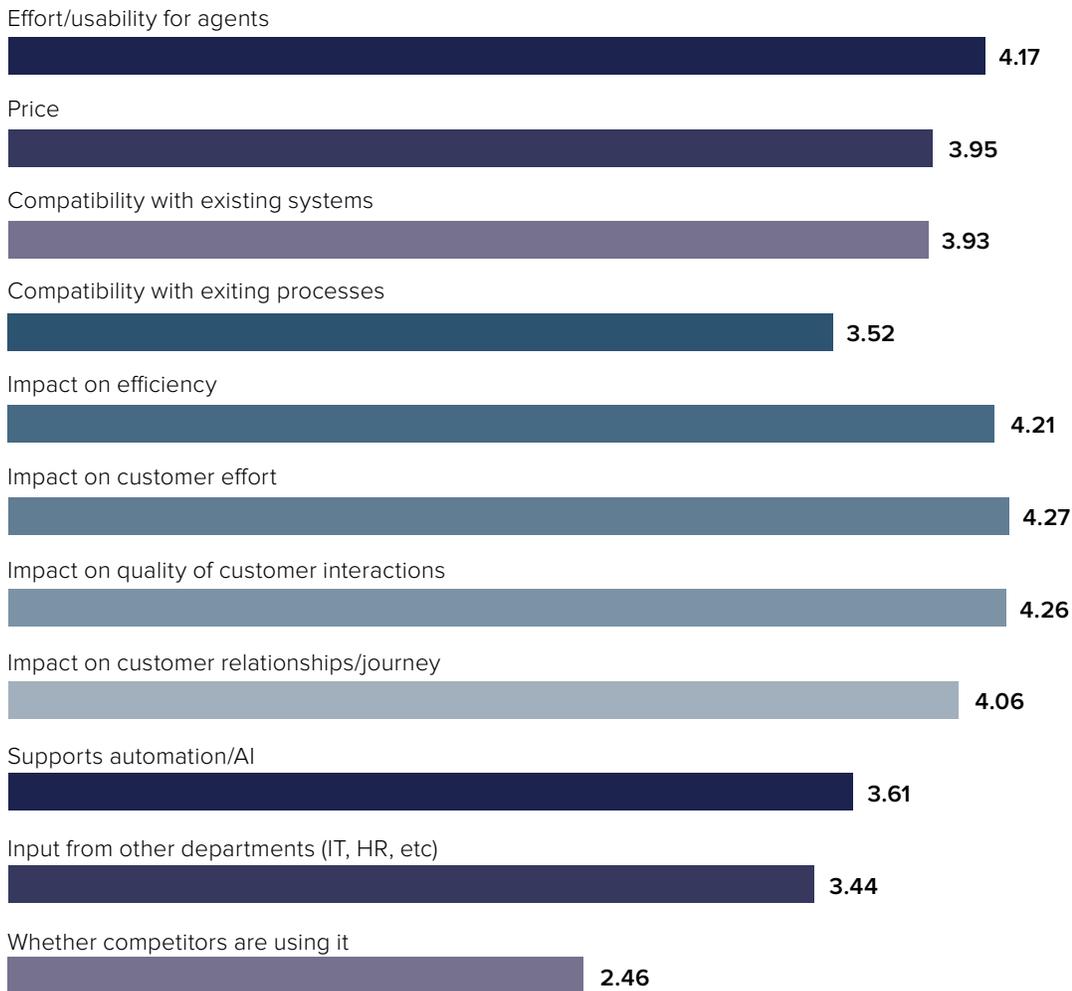
Many contact centers are also guilty of *chasing* new toys rather than pursuing organic new opportunities. This attitude has a neutral, if not deleterious, impact on relationships and journeys.

Consider the 2008-2015 social media gold rush. Companies declared their "support" for every single social channel under the sun, without considering whether the channel made sense for their business, how best to engage customers within the channel, or how to connect the channel with the rest of the experience journey.

At best, they created throwaway experiences insufficient for all but the most basic of inquiries. At worst, they created problematic fracture points, making it harder for agents to efficiently or effectively serve customers.

How important are the following when investing in new contact center technology or initiatives?

Effort/usability for agents
4.17

Price
3.95

Compatibility with existing systems
3.93

Compatibility with exiting processes
3.52

Impact on efficiency
4.21

Impact on customer effort
4.27

Impact on quality of customer interactions
4.26

Impact on customer relationships/journey
4.06

Supports automation/AI
3.61

Input from other departments (IT, HR, etc)
3.44

Whether competitors are using it
2.46

PRACTICALITY GUIDE

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yubico

EMPOWER YOUR AGENTS, PROTECT YOUR BRAND

You want your team to perform as productively as possible. You want agents who can handle more complex interactions with customers. You want the ability to adjust resources based on real-time need.

In pursuit of these goals, you are surely considering technology that provides a seamless, 360-degree view of the customer. You are certainly focusing on providing agents with access to vital information and tools regardless of channel, device or physical location. You are definitely accounting for agent and customer effort when evaluating solutions and developing progresses.

But are you considering the consequences?

As you provide *more agents* with easier access to pivotal customer insights, you risk leaving your contact center (and customers) vulnerable to data breaches and misuse. In turn, you risk damaging customer trust while creating considerable liability.

On the surface, it may seem like you have to choose between these two realities: reducing agent effort or increasing contact center security. This briefing, however, will reveal that you can have your cake and eat it too.

It will explore the dynamics of an agent-centric security philosophy (including a groundbreaking yet practical technology) that simultaneously *improves* the employee experience and protects vital data. Your customers will be more trusting, your agents will be more productive, and your business will be more profitable.

ANATOMY OF A MODERN CONTACT CENTER ENVIRONMENT

Aware of the security ramifications, a risk-averse contact center may ponder the importance of changing. Why bother transforming processes or implementing new systems if they will create significant vulnerabilities?

The problem is that the customer contact landscape is evolving. In order to compete in today's era of customer centricity, brands will need to rethink their approach to the contact center (and contact center agents). They will, thanks to the below trends, need to eliminate barriers regarding the data agents can access and the systems through which they can access it.

Agents are handling more complex interactions

"As customers turn to self-service for simple issues, they will only need agents for complex matters."

The popular cliché speaks to the evolving role of the contact center. Instead of merely processing basic transactions or answering simple questions, agents will engage in complicated, personalized interactions with customers. To succeed, they will require instant access to specific customer data -- generic scripts will no longer be sufficient.

As contact centers grant agents unprecedented access to information about customers and the greater business, they will have to prepare for the heightened security risk.

New emphasis on remote agents

Customer demands have never been greater, and it takes a higher caliber of agent to meet this new standard.

By allowing the company to look beyond the local talent pool and hire employees averse to the traditional "call center," remote work programs play a vital role in attracting stronger agents.

These programs also introduce a new level of risk to the organization. Just like internal employees, at-home agents will require seamless access to crucial customer records. The difference, however, is that they are operating outside the confines of the contact center and potentially using their own devices. These factors exacerbate ongoing security concerns.

Support for outsourcing and flexible staffing

Scalability is a priority for today's contact centers, which aim to allocate resources (including staff) based on need. This may involve contracting business process outsourcers to assist with growth, entry into a new region, or adoption of a new channel. In other scenarios, it may involve hiring part-time staff during seasonal peaks or periods of crisis.

In either case, the contact center will be opening its systems to employees who have not proven themselves trustworthy -- and may technically work for another company. These situations only exacerbate the risk of providing agents with unprecedented access to customer information.

Rise of omnichannel, multi-device interactions

Today's conversations are no longer restricted to the traditional phone channel. Agents, whether working inside or outside the contact center, are no longer relying exclusively on desktop computer and conventional tools.

Instead, they are using numerous devices to engage with customers in a multitude of channels, some of which are *fundamentally* public and thus insecure (not to mention subject to new compliance standards). They also carry their own mobile devices, which reduce a brand's visibility into how its agents are using customer data.

Since they cannot afford to ignore the rise of omnichannel, multi-device communication, it is imperative for customer-centric brands to develop the proper safeguards.

Agent effort as a metric

Compounding each of the trends is an important reality: *agent effort* has taken center stage in the contact center.

The majority of contact centers require agents to access multiple screens when supporting customers. Only 32% say their agents spend most of their days on meaningful work. Only 20% believe they are successfully using technology to boost productivity.

Usability of contact center tools, moreover, represents a leading agent experience driver -- one more significant than parties or rewards programs.

Contact centers are responding by making reducing agent effort one of their top objectives. Nearly 70% treat agent usability as a "very important" factor when purchasing solutions, and many are using intelligence tools to uncover and measure sources of agent frustration.

The ramification is clear: as contact centers address new security challenges, they cannot impose new burdens and inefficiencies on their agents.

THE RIGHT SECURITY IS THE SOLUTION, NOT THE PROBLEM

Contact centers do not have a choice when it comes to ignoring the aforementioned trends. They can either embrace the new customer experience normal or fall behind their competition.

They do, however, have a choice in how they address the security concerns. They can ignore the concerns and create vulnerabilities. They can impose aggressive restrictions on agents, easing some security concerns but hurting the employee experience. Or, they can embrace the below framework, which all-at-once boosts agent performance and security and compliance.

Re-train agents on key performance objectives

Agent neglect is a more widespread threat to security than *malintent*. Many agents are guilty of rushing through their work, in turn creating vast compliance issues and security vulnerabilities. Often, leadership pressure -- not inherent agent incompetence -- is to blame for these issues.

"In an environment where success is largely driven by the number of customer queries solved in a day, it can be easy for even the most well-intentioned agents to cut corners," said Jerrod Chong, Chief Solutions Officer, Yubico. "Unfortunately, in today's digital era, this often equates to poor security practices that affect the business. If an organization's defense mechanisms are cumbersome and reduce an agent's productivity, it will impact the end customer experience, lower overall agent job satisfaction, and ultimately impede a successful profitably-run contact center."

A contact center that can develop efficient, intuitive security tools and processes avoids this problem. But even before that step, an organization can close security gaps simply by *re-educating* agents on what matters to the business. By letting them know that average handle time and call count do not trump "quality" factors like accuracy and compliance, the contact center empowers agents to think more critically about how they handle customers and data.

It also frees them of the burden -- and frustration -- of feeling as if they need to rush through every call. It improves the agent experience *while* boosting security.

Design boundaries for outside agents

It is important to provide all agents, including remote and outsourced ones, with seamless access to the tools and data they need for their jobs. This does not, however, mean you have to provide them with seamless access to *all* systems.

Savvy brands are very *purposeful* in their approach to external labor. Rather than simply looking to "fill 100 seats," they identify the specific tasks for which outside work is most valuable. Not merely effective from a planning perspective, this design-driven approach also bolsters security.

In the ideal scenario, you would keep all sensitive tasks in house and thus markedly restrict the access you provide to outside employees. But even if such a dichotomy is impossible, simply defining *which* work you plan to "ship out" enables you to build the appropriate safeguards. You can ensure remote workers have the right devices and training for the data they will be handling. You can ensure outsourcing partners meet vital security and compliance standards.

By preventing data overload, this purposeful approach *also* creates a streamlined and easier experience for agents.

Eliminate risky security measures

Traditional password protection carries all the vulnerability it does in agents' personal lives, with two added challenges: 1) productivity suffers when agents contact support for a reset and 2) a stolen password provides fraudsters with access to sensitive corporate and customer data.

To avoid strict reliance on passwords, many contact centers use multi-factor authentication. Although MFA has merit, it becomes a problem when one of the factors is a mobile device. Many contact centers are guilty of this mistake.

Not simply inefficient for the agent, this model opens the door to a significant security vulnerability. It, notably, requires agents to bring their devices onto the (literal or figurative) contact center floor. This introduces another avenue through which agents can intentionally or unintentionally leak sensitive information.

Some businesses attempt to mitigate the risks by requiring agents to use company-owned devices, but this approach does not fully eliminate the experiential or security challenges. It is also a costly endeavor, particularly for those that rely on part-time work and/or simply have a high churn rate.

"It is becoming widely understood that using the phone as a 2nd factor authentication approach offers a poor user experience as well as a highly vulnerable security approach to man-in-the-middle attacks and other forms of account takeovers," explains Chong.

Adopt physical security keys

After adopting a pro-security mindset and eliminating ineffective measures, you can embrace a technology that achieves the ultimate duality: more efficiency and more security. You can embrace the physical security key.

"With one device, call centers can meet the most stringent security requirements, while also allowing agents to move freely and securely between devices, workstations, and systems," articulates Guido Appenzeller, Chief Product Officer, Yubico.

From Day 1, strong authentication hardware security keys account for all agent experience and security needs and concerns. The self-service, intuitive registration process allows users to setup their key without IT assistance. As simple as plugging a device into a USB port, using the key is just as simple -- regardless of where or when the agent is attempting to access key systems.

With built-in support for all major browsers and compatibility with key (passwordless) security protocol, the key eliminates the "agent effort" associated with traditional authentication measures. Agents will be able to instantly gain access to the tools they need (including useful third-party services), without remembering passwords, juggling different mobile devices or seeking IT assistance.

The emphasis on usability, importantly, does not come at the expense of security. Leadership retains full control and governance over the keys. It can selectively roll the keys out to certain teams, agents or business process outsourcing partners. It can also restrict user access not simply to *systems and data* but to certain actions.

"The YubiKey can verify a call center agent's identity before they can access PII and other sensitive data, or make changes to a customer account, such as raising a credit limit," says Appenzeller regarding the Yubico solution.

The key itself, moreover, is a security advantage. It is a physical device that does not have capabilities like Internet access or a camera. As a result, it offers the assurance of an "ownership factor" without the risks of a mobile device.

In addition to achieving compliance with evolving security protocol, ongoing development includes building fingerprint readers into the physical key.

"Imagine call centers run without passwords, identities proven with just the touch of a finger, and the elimination of account takeovers," proposes Stina Ehrensvärd, CEO and Co-Founder, Yubico. "These are the types of experiences that can transform the customer service industry at scale, and are now available to the world."

PROOF OF IMPACT

As the recommendations are practical and cost-effective, leading organizations are starting to take advantage. They are pairing YubiKeys with revamped contact center visions, and in turn enjoying vast operational and security benefits. Agents are more productive, IT departments are less frustrated, and customer insights are immensely more secure.

An example use case follows:

Company	Challenge	Solution + Result
Large financial corporation specializing in credit cards, auto loans, banking, and savings accounts, and ranked in the top 10 largest banks in the United States by assets.	Large financial services corporation needing to secure global workforce **Call Centers** - Needed to secure global workforce with shared workstations; secure front-line to customers with sensitive PII & PCI data **Retail Workers** - Needed a fast and seamless login in order to deliver efficient customer service **Privileged Access** - Secure data accessed by executives, knowledge workers and other privileged users	The YubiKey Solution delivered the following benefits: **Ease of Use** - Enables rapid login and supports response time SLAs **Low TCO** - Supports One Time Passcodes (OTP) in place, with plans to adopt modern authentication approaches such as FIDO U2F as well as smart card PIV all with one single security key for low TCO **Identity and Access Management (IAM) Integration** - Supports single sign-on and federation with existing IAM backend **Result Metrics:** • 1400,000 total accounts secured, including 118,000 privileged accounts • Call center response time SLAs supported • Reduced support incident burden on central IT for security key registration

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DECEMBER
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