



MARKET STUDY

**FUTURE OF  
CONTACT CENTER  
EMPLOYEES**

JANUARY

**2024**

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## Intro

The biggest cost of universality is a lack of intense questioning. This reality has long been evident when it comes to the contact center employee experience.

Few contact center leaders dismiss the importance of the employee experience. Few doubt the impact empowering atmospheres have on agents' ability to support customers.

But as we celebrate broad ideas around the employee experience and trumpet concepts like "happy agents equal happy customers," we do not always ask ourselves what it truly means to generate agent happiness. Equally importantly, we do not always question whether supposed "employee empowerment" initiatives will actually deliver short-term happiness, let alone spur long-term improvements in performance, engagement, and retention.

This lack of questioning is particularly notable – and concerning – when it comes to the impact of artificial intelligence (AI). As we embrace concepts like "AI for simple issues, agents for complex work" as *employee-centric initiatives*, we may not sufficiently question whether agents want to do the work, have the skills and capacity to do the work, or have the leadership support to do the work. As a result, we may not be taking the necessary steps to cultivate a next-generation workforce that is ready, willing, and eager to delight ever-demanding customers in an ever-complicated customer experience landscape.

To help the contact center community overcome these challenges, CCW Digital is thrilled to share this market study on the **Future of Contact Center Employees**. The product of exclusive, in-depth research, it reveals how the role of the agent will evolve in the era of AI. More importantly, it reveals the questions leaders must ask and the steps leaders must take in their effort to prepare and motivate agents for the new, AI-driven normal.

It closes with a look at how the *supervisor experience* must concurrently evolve to create managers who can become coaches and bosses who can become visionary leaders.

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## Methodology & Demographics

To understand the future of contact center employees, CCW Digital conducted an extensive survey in January 2024. The survey uncovered perspectives from an audience of contact center, customer experience, marketing, and operations leaders.

Respondents represented organizations of most industries and all size ranges. Example job titles included director of client experience, manager of member of experience, chief customer officer, head of customer care, vice president of customer engagement, vice president of customer service, senior vice president of operations, head of client care, senior director of customer experience, vice president of contact center operations, and senior director of customer success.

## About the Author



**Brian Cantor**  
Principal Analyst, CCW Digital  
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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. 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 Employee engagement remains a top priority, with 95% of contact center leaders still faithfully subscribing to the idea that “happy agents equal happy customers.”
- 2 Top employee experience focuses for 2024 include satisfaction and retention, training and coaching, and performance management. Though still on the radar, rethinking compensation and career pathing represent comparatively less popular priorities.
- 3 The fear of AI replacing jobs is palpable, with 70% of acknowledging the existence of such concern within their teams.
- 4 Granted, many leaders do not feel the fear is warranted. Only one-fifth presently worry that AI will lead to significant contact center job reduction.
- 5 But even if it does not eliminate jobs, it will likely change the nature of the agent role. Many contact center leaders expect AI to remove at least some simple issues from the typical agent’s job, thus shifting them to more complex, high-value work.
- 6 Nearly 90% are confident agents would be willing to take on this more complex work, although a non-trivial percentage believes this eagerness is contingent upon improving compensation and career path opportunities.
- 7 Once they are willing, agents will need to develop skills related to product mastery, emotional intelligence, multichannel fluency, and knowledge management. More than eight-in-ten contact center leaders believe their teams will require at least six months to cultivate such competencies.
- 8 Beyond providing the requisite training, contact centers will have to eliminate inefficiencies that inhibit successful performance. At present, high volumes of simple issues, ineffective knowledge management solutions, insufficient customer data, and burdensome non-interaction work create undue effort for agents.
- 9 Despite trumpeting the importance of providing more personalized, consultative support, only 6% of contact centers actually grant agents complete freedom to go off-script and provide “above and beyond” care.
- 10 To empower the next-generation agent experience, successful brands must cultivate a team of next-generation supervisors. Crucial competencies for the manager of the future include the ability to coach for product mastery, comfort with modern contact center systems, adeptness at managing customer and employee feedback, and a flair for managing based on big picture outcomes rather than traditional efficiency metrics.



## Is Employee Happiness Still An Objective?

When it comes to contact center cliches, none trumps “the customer is always right.” There is, however, one with *nearly* as much ubiquity: happy agents equal happy customers. The mantra has become a driving force for the contact center community, spurring innovation around everything from automation solutions, to office culture initiatives, to workforce management strategies.

Of course, when a cliché becomes so *universal*, it is worth questioning the extent to which the message still resonates. Is the “happy agents equal happy customers” phrase lingering due to familiarity and complacency, or is it enduring because contact center leaders truly and actively swear by the concept?

The latter answer is the correct one. A whopping 95% of contact center leaders acknowledge a crucial link between employee and customer experiences.

Nearly two-thirds continue to take the phrase at face value, believing confidently that emotionally happy employees deliver better experiences for customers. Thirty percent (30%), meanwhile, take a less literal approach to the phrase. They see the adage not necessarily as a call to focus on *emotional happiness* but instead as a reminder to empower overall agent performance.

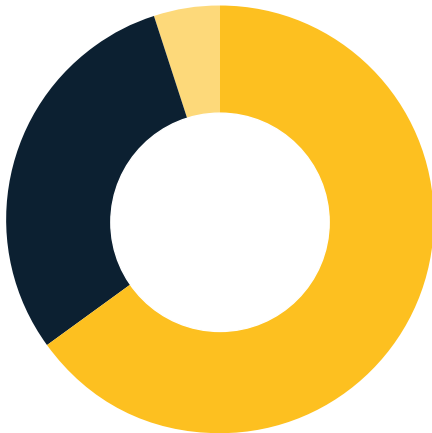
But regardless of whether one focuses on emotional happiness or operational empowerment, one thing is abundantly clear: the employee experience still matters greatly to today’s contact center leaders.

Befitting this reality, contact center leaders plan to prioritize numerous employee experience initiatives in 2024. Particular priorities include satisfaction and retention (93%), training and coaching (90%), performance management and measurement (88%), and empowerment through better tools, technology, and/or data (86%).

Granted, not *all* employee experience measures are commanding the same degree of attention. Though on the radar, initiatives like re-evaluating compensation (54%), rethinking career pathing (68%), and accommodating more flexible scheduling models (70%) rank as comparatively less common priorities.

Will brands that avoid addressing pay, career trajectory, or work flexibility substantially bottleneck their ability to achieve universal objectives like satisfaction and retention? Given the anticipated evolution of the agent role, that question will gain new relevance as contact centers look to the future.

**Does your contact center/CX team subscribe to the idea that “happy agents = happy customers”?**



- **65%** Yes - we truly believe that emotionally happier agents will deliver better customer experiences
- **30%** Somewhat - we see a connection between CX and EX, but it's more about empowering agent performance than literally making them “happy”
- **5%** No - we see the CX and EX as two separate things

**Over the past year, do you feel your contact center has improved in the following areas?**





## Fired or Empowered? What Does AI Really Mean For Agents?

Though not *quite* as recognizable as “happy agents equal happy customers,” the notion that “AI will augment rather than eliminate agents” has become rather popular among contact center professionals.

Of course, the notion was far easier to blindly accept when AI contact center solutions were still in their infant stages. When chatbots were *terribly unhelpful* and agent assistance tools were *disappointingly robotic*, there was little immediate reason to see AI solutions as a *threat* to agent jobs. In that era, the question was not whether AI tools would eliminate agents but whether they could even handle enough simple issues to meaningfully augment performance.

AI technology has, however, come a long way. Generative AI projects like ChatGPT prove that AI is capable of automating meaningful contact center work, while demonstrating that

self-service can be more dynamic, conversational, and personalized than the convoluted IVRs and static FAQ pages of yesterday.

As confidence in AI’s transformative potential grows, so too does concern over its impact on human contact center work. Nearly 71% of contact center leaders acknowledge that fear of AI-driven job loss exists within their organizations.

Is that fear warranted? Today’s contact center leaders have mixed feelings.

A non-trivial 16% still doubt AI will meaningfully impact the contact center, while 26% believe its impact will be limited to only the most basic tasks – thus having little consequence for the role of the agent.

On the other hand, 7% feel AI will definitely lead to significant job reduction.

The balance of leaders subscribe to the idea that AI will absorb many current agent tasks, thus enabling them to pivot to more complex work. They do, however, have conflicting perspectives about what this ultimately means for headcount.

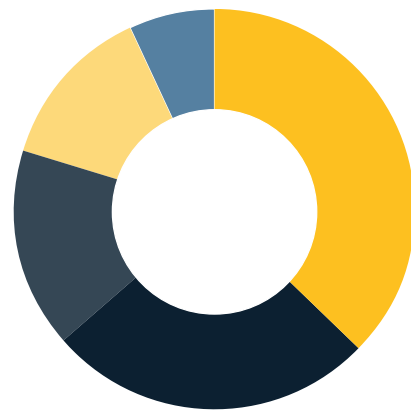
Nearly 38% of contact center leaders are taking an upbeat view of the “AI for simple issues, agents for complex ones” mantra, noting that there will be enough new work to keep most agents around. Just over 13% are taking the pessimistic perspective, fearing that there will *not* be enough complex work to avoid headcount reduction.

**Which best describes how your contact center/ CX team addressing the fear that “AI may replace employees”?**



- **29.38%** No need - there is no fear of AI replacing humans within our team
- **26.25%** Broadly discussing the future of AI and how it may or may not impact headcount during team meetings, coaching sessions, etc
- **24.38%** Not actively addressing it, but the fear/concern does at least somewhat exist
- **20.00%** Actively highlighting specific ways AI will empower employees / lead to a better agent experience

**In your personal opinion as a leader, do you expect AI to lead to headcount/team reduction within the contact center/CX function?**



- **37.50%** Somewhat - AI will absorb many current agent tasks, but we'll have enough new work to keep most agents around
- **26.25%** Not really - AI will only absorb very simple/repetitive tasks, so we'll still need almost all agents
- **16.25%** No - we are not currently convinced AI will meaningfully impact contact center workflow/needs
- **13.13%** Probably - AI will absorb many current agents tasks, and there is not enough complex work to avoid headcount reduction
- **6.88%** Definitely - AI will lead to a significant reduction in headcount



## Are Agents Ready (and Eager) For The New AI-Driven Normal?

Although they have not yet reached a consensus on whether AI will definitely lead to meaningful job loss, the majority of contact center leaders accept that it will at least meaningfully transform the role of the agent.

As AI solutions help brands automate traditional contact center tasks, agents will pivot to more challenging, less predictable work. This pivot may entail focusing on more complicated customer interactions, taking on more analytical tasks, or moving outside the contact center. The point, however, is that transformation appears inevitable. And if the role of the agent is changing, so too will the associated workflows, competencies, coaching strategies, and career trajectories.

### DO AGENTS ACTUALLY WANT “COMPLEX” WORK?

“AI will automate simple issues so that agents can focus on complex ones” has historically been presented as an *employee-centric* notion. The argument was that because agents dislike performing rote tasks and addressing repetitive customer inquiries, they would be much happier handling more difficult and complex interactions.

Many contact center leaders still subscribe to this mindset, albeit with a caveat in some cases. Whereas 49% believe their agents are already eager to take on more complex work, 40% feel that willingness is conditional upon receiving better compensation and/or career opportunities.

The distinction underscores a long-standing philosophical discrepancy. Despite constantly trumpeting the importance of contact center agents with phrases like “happy agents equal happy customers,” businesses generally do not treat them as high-value, irreplaceable parts of their business. Compensation is rarely spectacular, career paths are often murky, and turnover tolerance is generally high.

The pivot to more complex work will only amplify this discrepancy, as agents will not only be *told* they are important but explicitly asked to handle high-stakes, mission-critical work. Shouldering this burden at the same time they are receiving external advice to be more assertive in setting boundaries (and more direct in seeking incentives for going “above and beyond”), agents are more likely than ever to initiate compensation discussions.

In many cases, to think otherwise would be to indulge in a significant fantasy. After all, 61% of contact center leaders believe a lack of employee buy-in inhibits their ability to *train* team members. If agents do not feel immersed enough in the business’ vision to fully commit to a few extra coaching sessions, are they really going to take on more daunting day-to-day work without incentives?

Given this context, the fact that compensation and career pathing are the two lowest-ranking employee experience priorities seems especially alarming.

**Is the idea of “automating simple tasks so agents can focus on more complex work” appealing to your contact center/CX employees?**



- **49.38%** Yes, they are eager to handle more complex work in their current roles
- **40.00%** They will be eager as long as it comes with better compensation, career trajectories, etc
- **10.63%** No, they are content with the tasks they presently handle

**CAN AGENTS ACTUALLY HANDLE NEXT-GENERATION WORK?**

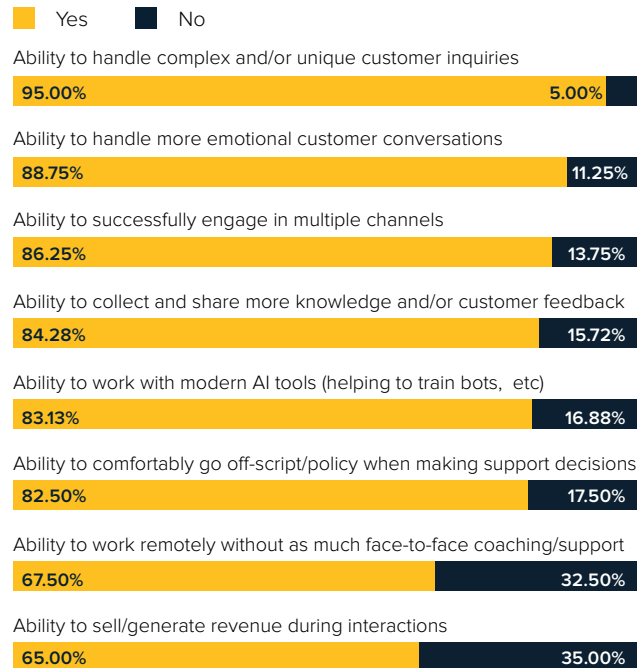
Granted, it is certainly possible that some agents detest repetitive work so much that they would take on challenging tasks without extra compensation. It is also possible that many brands *will* introduce new incentives and career opportunities as the agent role evolves. In these cases, agents will eagerly embrace the evolution of their workflow.

This willingness will be of little consequence, however, if agents lack the capability to perform new, more challenging tasks.

Moving forward, 95% believe all agents will require the ability to handle complex or unique customer inquiries. Nearly 89% say the same of the ability to handle emotional customer conversations; multichannel fluency (86%) and a flair for collecting and sharing knowledge and feedback (84%) will also rank as important competencies.

Other essential skills will include comfort working with modern AI tools (83%), going off-script (83%), working autonomously (68%), and engaging in sales and revenue-generation conversations (65%).

**Moving forward, do you feel the following skills will be essential for most contact center/CX agents?**



What the “AI will automate simple issues so that agents can focus on complex ones” adage ignores is that many contact center agents do not yet possess these skills. Only 16% of contact center leaders, in fact, believe their agents will be ready to demonstrate these essential competencies within the next six months.

More than 28% actually believe it will take until next year to showcase these abilities, with another 17% worried it could take more than two years to close the competency gap.

As distant as they are, these timelines may actually prove *optimistic*. Today’s contact center leaders identify myriad training challenges, all of which could lengthen the time it takes for agents to cultivate the necessary skills – and take on the complex work for which AI is unsuitable.

A lack of time and resources represents the most notable training challenge, with 68% of leaders calling it an inhibitor to agent development. Other key challenges include technology issues (67%), managing diverse agent personalities and existing skill sets (61%), and achieving employee buy-in (61%).

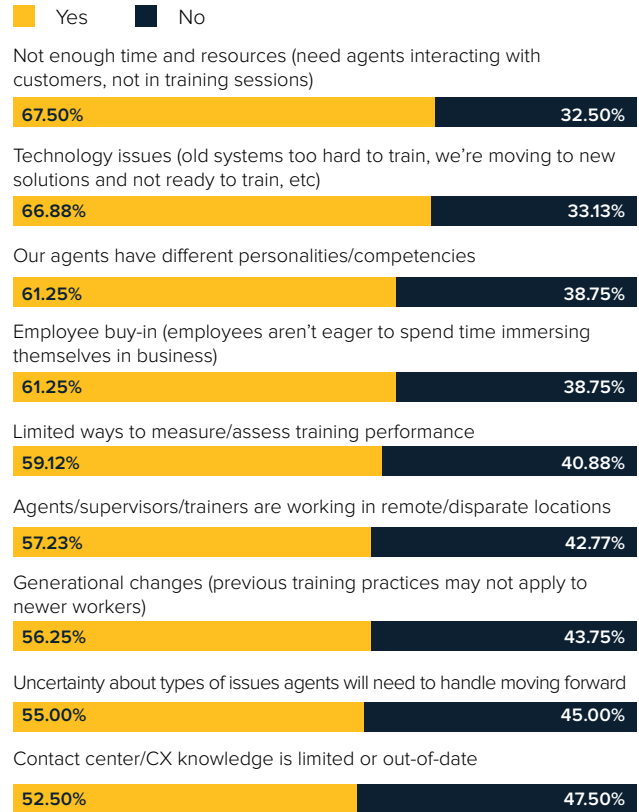
Whereas contact center leaders can *technically* eliminate the former two challenges by devising better workforce management strategies and investing in better systems, personality diversity is actually *essential* to the next-generation

### When do you feel agents will have the necessary training and support to demonstrate those competencies?



- **38.75%** 6-12 months - they should be demonstrating these areas by end of year
- **28.13%** 12-24 months - we expect agents to excel at these areas next year
- **16.88%** 24+ months - preparing agents for this evolution is a long-term process
- **16.25%** 0-6 months - they are or are already very close to excelling at these areas

### When it comes to successfully training and coaching your agents, do the following represent challenges/inhibitors?



contact center. If contact centers want to deliver more personalized, human-centric experiences, they will require agents who can appeal to customers with different sensibilities. Overcoming this hurdle, therefore, will not be about finding ways to minimize diversity between agents but instead about empowering them to perform their tasks without compromising their unique identities.

Agent buy-in is essential not only for making training more effective but for fostering more productive, off-script conversations. If agents do not fully know, let alone care, about a company’s brand vision, what chance do they have of properly representing corporate values when dealing with unexpected customer inquiries?

### ARE AGENTS FREE TO TACKLE NEXT-GENERATION WORK?

Eager, capable agents may have the potential to thrive in the contact center of the future, but there is still no guarantee all organizations will be able to tap into that power. If existing systems, strategies, and practices prevent agents from sufficiently focusing on high-value work, they will be forced to choose between delivering inefficient or insufficient performance. And insofar as the stakes of their work will be unprecedentedly high, the cost of this ineffective performance will be unprecedentedly great.

Given the significant effort to which they presently subject their agent, the typical contact center should be very concerned about this reality.

At present, a whopping 83% feel agents exert too much time and effort on simple customer interactions. Nearly 73% of contact centers require agents to waste too much energy looking up knowledge, while a similar amount lament the inefficiency of customer authentication. Completing non-interaction work (71%) and using crucial contact center systems (61%) also represent undue effort sources in the clear majority of organizations.

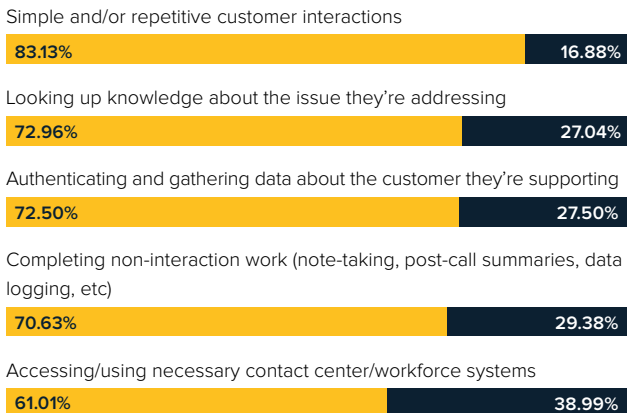
On the one hand, the idea of using AI for simple issues represents an immediate solution to the former problem. If high-quality chatbots absorb basic customer inquiries, agents will automatically gain more time and opportunity to focus on higher-value issues. It is for this reason that 89% see investing in AI-driven self-service as an important employee satisfaction and performance initiative. Nearly 68%, meanwhile, are evaluating ways to use AI for proactive customer outreach.

On the other hand, shifting agents to more complex work exacerbates the impact of the other inefficiencies. Since agents will be asked to address and analyze more complex inquiries while meeting higher thresholds for personalization and empathy, they will be especially reliant on product knowledge, customer data, and supportive tools. If accessing these resources remains difficult, the impact on the customer experience, not to mention agent satisfaction, will be greater than ever.

Fortunately, brands are prioritizing AI as a solution to many lingering agent experience challenges. In addition to the obvious self-service opportunity, the overwhelming majority of brands are exploring AI-driven solutions for Agent Assist (92%), customer sentiment analysis (82%), and post-call work (79%).

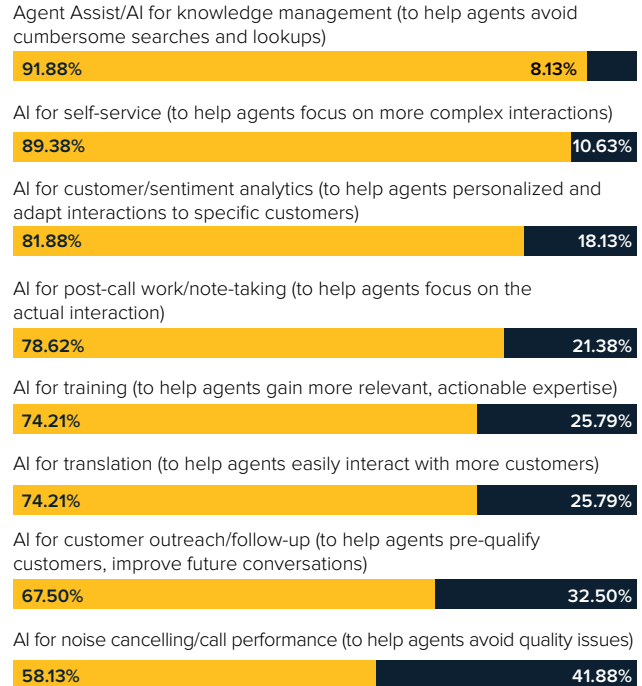
**Do you feel the typical agent spends too much time and/or effort on the following?**

Yes No



**Do you feel the following AI opportunities are important for empowering employee satisfaction and performance?**

Yes No



AI solutions for training (74%), translation (74%), and call quality (58%) are also on the typical contact center's radar, underscoring the desire to not only reduce agent effort but actively improve their ability to perform at a high level.

If they are successful in sourcing and introducing these solutions, contact centers will not simply remove inhibitors to agent performance. They will also change the narrative around AI.

By providing a frontrow seat to how AI can help agents perform higher-value work at a higher-level, contact centers take a meaningful step toward proving that AI truly is about augmenting rather than replacing their employees.

**DO CONTACT CENTERS TRULY WANT AGENTS TO HANDLE NEXT-GENERATION WORK?**

At the end of the day, do contact center leaders really want agents to change the way they support customers? Do they really support an environment in which agents ditch scripts as they work to deliver more personalized, human-centric support? Do they really seek a contact center operation that prioritizes customization and empathy at the expense of process and simplicity?

Or, are the calls to automate simple tasks so that agents can focus on complex work an exercise in empty rhetoric?

The answer to this line of questioning is certainly not straightforward.

Contact center leaders are not *totally* insincere in their pursuit of more empowered, dynamic, empathetic agents. A substantial 88% of leaders are emphasizing soft skill training to achieve this exact outcome. The overwhelming majority of contact center leaders are also taking numerous other measures – from reducing agent effort (77%), to providing more customer data and context (77%), to recalibrating metrics (71%) – with the explicit intent of fostering more human connections.

If contact center leaders really wanted all agents to deliver generic service in adherence with a strict average handle time, these initiatives would not be on the radar.

But as they pursue these initiatives and make these investments, many contact center leaders remain prisoner to a sense of caution. They remain hesitant to go all-in on the notion of truly personalized, dynamic support.

A staggering 82% of contact center leaders offer agents minimal freedom to go “above and beyond” when issuing make-goods and compensation to customers; 41% provide no freedom whatsoever. By contrast, just 6% grant agents complete autonomy to make their own off-script support decisions.

Already disappointing, such risk aversion will only become more troubling as the contact center undergoes the AI transformation. As self-service options become more available and robust, customers will already have instant,

on-demand access to the “standard answer.” They will already know what corporate policies and knowledge bases say when it comes to getting answers and compensatory gestures.

If they escalate to an agent, it will be because they either do not feel their issue fits into the standard process or do not feel content with the typical support outcome. They will thus expect agents who can swiftly – and meaningfully – tailor the support experience to their unique issue and provide their desired resolution.

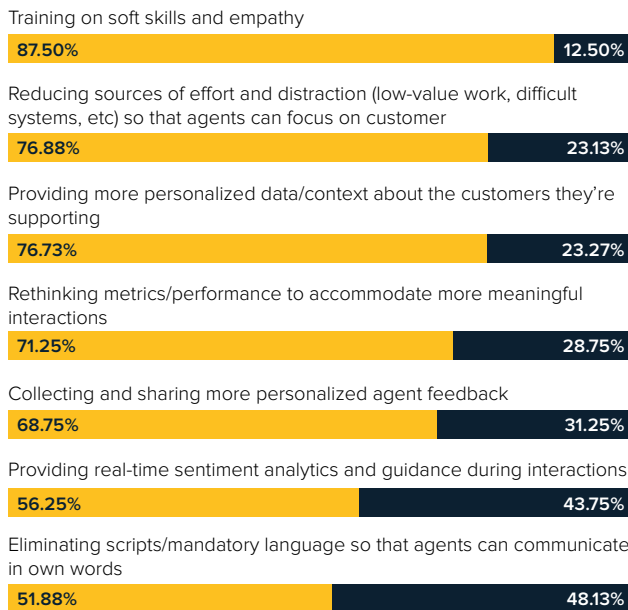
If agents fail to adapt accordingly, customers will be *doubly* dissatisfied – first because they did not get what they wanted, and second because they wasted time escalating to a representative who was of no more help than the chatbot. This dissatisfaction will manifest as hostility, ultimately leading to an unsatisfying *agent experience*.

Obviously, the idea of giving agents total freedom to provide magical experiences for every customer will prove untenable in certain organizations. If even permissible legally and logistically, such an approach will not be popular financially.

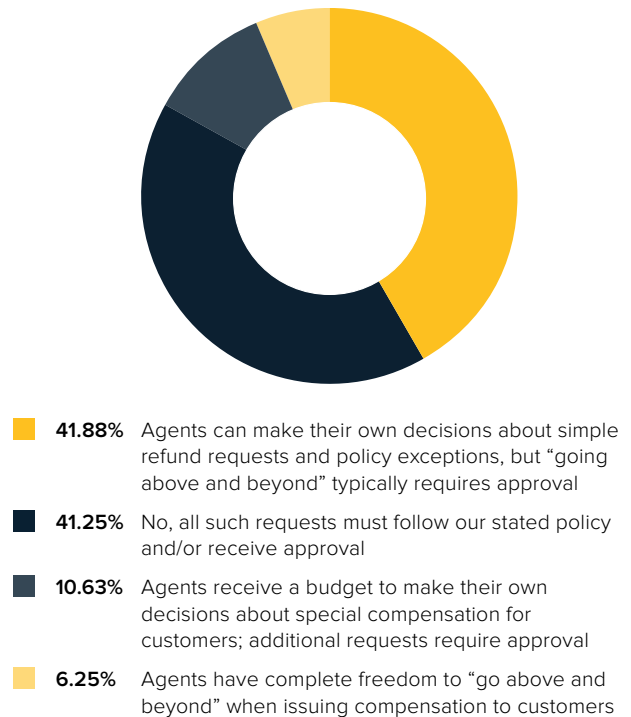
Leaders will, however, have to begin thinking intently about what human-centric support actually means in the context of their organization. They will subsequently have to determine whether they are *truly* empowering agents to meet that standard.

**Is your organization doing the following to help agents achieve stronger human connections with customers?**

■ Yes ■ No



**Do your employees have the freedom to provide make-goods, gifts, refunds, and/or policy exceptions – without supervisor approval – when supporting customers?**





## Are Supervisors Ready For The Contact Center Of The Future?

When thinking about the employee experience, many contact center thought leaders equate “employee” with “entry-level agent.” Blogs, reports, webinars, and whitepapers exclusively focus on how to empower happiness and excellence on the front lines.

To succeed in practice, business leaders cannot exclusively focus on the frontline. They must also consider the *supervisor experience*.

After all, supervisors are seasoned, high-value employees whose knowledge and experience are both essential to success and difficult to replace. Failing to properly satisfy, retain, and motivate supervisors will prove immensely costly.

Supervisors, moreover, play a crucial role in empowering the frontline. If they lack the right skills, motivation, and tools, any desire to elevate the agent experience will go unfulfilled.

The latter point is particularly important, given the fact that the typical contact center is expecting agents to adapt to significant change – and develop significantly new skills. Without strong supervisors to help agents navigate this evolution, the contact center will ultimately struggle to meet ever-changing customer expectations.

What competencies are most essential for managing agents in this new normal?

Unsurprisingly, the ability to train agents on next-generation skills like product mastery and empathy represents the #1 answer. A whopping 93% of contact center leaders view that competency as essential for the supervisor of the future.

Other crucial skills include the ability to train and coach on new technology (91%), the ability to elicit, capture, and leverage feedback (91%), and the ability to manage with an emphasis on outcomes rather than traditional metrics (90%).

The consensus around these competencies is the antithesis of surprising.

Given that many of today’s agents are 6-24 months away from developing the skills needed for complex, high-stakes work, they will rely on supervisors to impart the requisite wisdom and guidance. Given that contact centers are exploring a plethora of AI-driven solutions, technology-savvy supervisors will be essential for harnessing the power of these tools – and maximizing the return on investment. Given that contact centers will be emphasizing higher degrees of personalization and customization, customer and employee feedback will become the

paramount barometer for refining strategy. Given that contact centers want agents to build deeper connections with customers, the ability to calibrate performance based on a vision – rather than immediately quantifiable metrics – will enable scalable success.

Though obvious, these competencies are not yet omnipresent. Only 14% of contact center leaders believe their managers and supervisors will demonstrate these competencies within the next 6 months. Just over 50% feel it could take at least 1 year, with a non-trivial 16% anticipating a development phase of at least two years.

**Moving forward, do you feel the following skills will be essential for most contact center/CX managers, supervisors, and/or leaders?**

■ Yes ■ No

Ability to train and coach for evolving agent needs, like complex product mastery and empathy



Ability to train and coach on new contact center technology



Ability to elicit, capture, and leverage customer and employee feedback



Ability to manage with an emphasis on outcomes (customer satisfaction) rather than traditional metrics (AHT, call count, etc)



Ability to foster collaboration/culture within team



Ability to connect with different personality types, work generations, etc



Ability to understand greater business impact of contact center/CX operations



Ability to train, coach, and manage performance in a remote/hybrid/flex setting



Ability to implement new workforce/time management principles amid AI transformation



Ability to identify, recruit and onboard talent with modern, AI-compatible skillsets



**When do you feel supervisors will have the ability to sufficiently demonstrate those competencies?**



- 35.63% 6-12 months - they should be demonstrating these areas by end of year
- 34.38% 12-24 months - we expect supervisors to excel at these areas next year
- 15.63% 24 months - preparing supervisors for this evolution is a long-term process
- 14.38% 0-6 months - they are or are already very close to excelling at these areas



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PRACTICALITY GUIDE



## CRESTA

### Sales Performance Gap 2.0:

## How Customized Strategies Drive Dependable Sales Performance & Outcomes

Is excelling at sales an art or a science? The unhelpful (but true) answer is: it's both. Great salespeople are often charismatic and articulate — but just as often (perhaps more often), they are methodical and consistent.

Without an established blueprint for achieving this balance, how can organizations consistently foster sales success? And just how significant is the divide between average and top performers?

Cresta customer data has found that, in transactional selling environments, there's a **59% performance gap** between average and top salespeople. That gap grows to a staggering 200% in particularly complex sales environments.

It doesn't take more than some quick napkin math to see that this gap has major financial implications.

Given this fact, it's little wonder that contact center leaders are eager to elevate average performers, and bridge that performance gap across their organization. But on this quest, it's important to remember a more artful aspect of the selling environment: there's a direct **correlation between agent experience and performance**. Happy agents perform better. Agents who perform well are happier and more satisfied in their careers.



Too often, there’s a disconnect on the path to achieving harmony between agent performance and agent happiness, even though they are inextricably linked.

One of the surest ways agents can perform well is by adhering to established best practices — we found that salespeople who stick to the script generate 26% more revenue per conversation and have 21% better conversion rates than their peers. However, agents **cite the use of scripts as a top stressor**, and one that may even inspire them to leave their role.

This leaves contact center leaders with a knot to untangle: encourage adherence without causing agents stress, or otherwise accept a significant (and costly) sales performance gap.

So, how can you effectively navigate the art and science of selling to arrive at a strategy with no forced trade-offs? In this eBook, we’ll explore key selling behaviors, the market trends applying pressure, and the importance of a tailored approach in closing the sales performance gap. You’ll also hear success stories from four leading businesses across four distinct industries on how they’re leveraging Cresta’s generative AI to drive the outcomes that truly impact their business.

### THE SCIENCE OF SELLING: Existing Formula for Closing the Performance Gap

In 2022, Cresta published a landmark report on the Sales Performance Gap in which we identified a massive disconnect between top and bottom performers. Report findings discovered that organizations leave as much as 48% of potential revenue on the table.

Fortunately, we also identified a path to closing that gap by

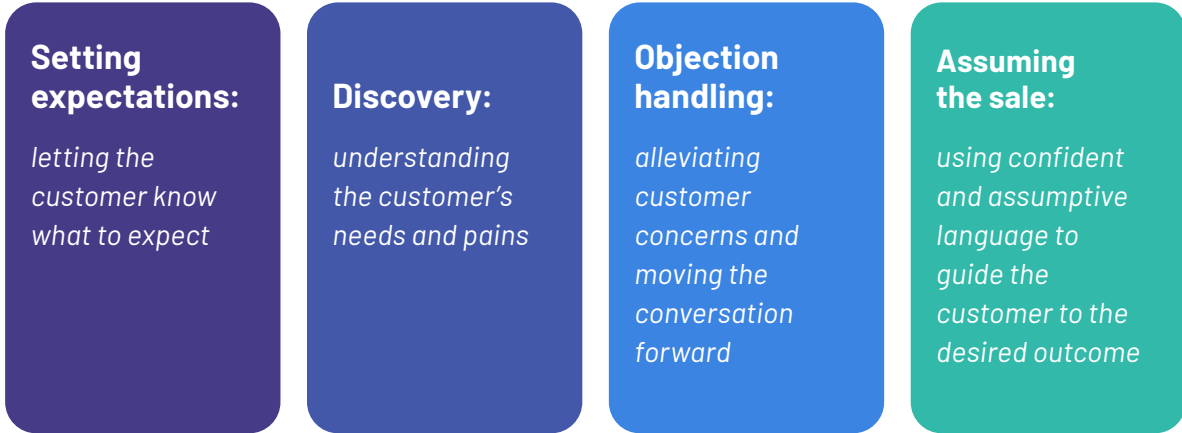
highlighting four key behaviors that top performers follow more closely and consistently than their peers:

Our 2022 report analyzed 340,000 conversations across industries and ranked agents based on revenue per chat and conversion rate to arrive at these behaviors — we intentionally analyzed semantics rather than syntax to provide more flexible behavioral guidance.

This line of thinking — one that considers sales performance behavior-centric — is common. According to Cresta’s **2023 Business Decision Maker’s Report**, 67% of sales leaders in revenue-generating contact centers believe they have identified the key behaviors that drive conversion, and 85% believe that increasing adherence to these behaviors would improve sales execution.

But our thinking has evolved since we first published our research on the sales performance gap - and so has the volume of conversations we’ve analyzed. For this report, we’ve analyzed over 6 million conversations to deliver new insights.

Today, we understand that performance doesn’t hinge solely on sweeping key behaviors — no matter how generally impactful those behaviors may be. And in fact, there is no one-size-fits-all guidance that applies to every contact center in every industry. Instead of looking exclusively at the behaviors performed by the best agents, it’s also important to take a much closer look at the outcomes that one can expect as a result of these behaviors, the metrics by which top agents are evaluated, and the context of their wins. This allows for the creation of a more concrete, repeatable, and ultimately, predictable playbook. It’s also important to note that developing this playbook is distinct from expecting agents to follow a rote script; rather, this playbook built on winning behaviors and outcomes allows for a dynamic,



organic flow that agents can flexibly apply their own style to.

In light of current market trends, this tailored approach isn't just valuable — it's vital.

**ECONOMIC PRESSURE, EMPLOYEE TURNOVER, AND EMPHASIS ON OUTCOMES**

While economists debate whether the U.S. has entered (or is barreling toward) a recession in 2023, there's no question that businesses are feeling the squeeze of volatility. Across industries, organizations are under pressure to do more with less, and contact centers are no exception.

Over 50% of contact center leaders say employee turnover and business optimization - doing more with less - are the top challenges they currently face. Taken together, these challenges speak to contact centers' need to keep agents happy, and to ensure they're performing optimally: two goals we know to be closely connected.

Perhaps because it is simpler to identify ways to drive sales than to keep agents satisfied, organizations tend to focus on the former. And while the vast majority of contact center leaders believe adherence to key behaviors drives sales performance, the preferred means of measuring that performance varies.

When asked how they measure adherence to the sales playbook process, 83% of contact centers said they measure overall team effectiveness against revenue targets, 55% said they measure all interactions against the playbook, and 45% said they sample calls to determine if reps are following the playbook.

In these responses, we see a clear trend: while contact centers generally measure how closely agents are following prescribed best practices, they're actually most interested in what comes after those behaviors:

the outcomes. Given that agents who feel adequately supported and who perform well tend to report greater levels of satisfaction in their roles, finding ways to drive outcomes allows contact centers to confront both of their top challenges.

So, rather than simply driving adherence to best practices, it's time to take a more holistic approach that not only accounts for the pressure to perform, but also considers agent experience and how to optimize it. With all of this in mind, Cresta has identified an updated set of steps that drive dependable outcomes. To illustrate the proven value of this three-step approach, we'll first share success stories from industry leading customers.

**THE APPROACH IN PRACTICE: Real-Life Results from Industry Leaders**

Before we lay out the details of Cresta's three-step approach, we'll explore results from real customers across four distinct industries who turned tailored insights into dependable outcomes.

To do this, Cresta analyzed over 6 million conversations - up from 340,000 in our **first Sales Performance Gap eBook**. Cresta's proprietary generative AI prompts agents in real time to perform behaviors, and then tracks if those behaviors are performed. Based on the opportunity to perform these behaviors, the agent following through with them or not, and the corresponding business outcome, we calculate the KPI impact of performing these pivotal behaviors at the right opportunity. Read on to learn about how this impacted four leading businesses.

**A top five bank in the US wanted to increase promises-to-pay (PTP) in highly delinquent collection claims**

Powered by Cresta's generative AI, one of the five largest consumer US banks had built out processes to guide their

collectors through the negotiation and collections process with customers, but found that oftentimes, collectors were not adhering to the playbook when engaging clients.

They further discovered that in cases where claims were three or more cycles past due (highly delinquent), assuming a promise-to-pay - their default behavior - from cardholders for the full amount was far less effective than negotiating payment and taking a more nuanced approach.

Over the course of 90 days, agents who followed a “negotiate payment” hint by asking “how close can you come?” achieved promises to pay 30% more frequently than agents assuming the cardholder could pay the full amount due.

This subtle shift in agent behavior - which also engendered a culture of empathy and relationship-building with clients - had tremendous implications for the business. Now, rather than charging off these highly delinquent claims, the team was able to collect on the claims.

**One of the largest telecommunications companies in the US drove higher sales and conversion rates across critical KPIs.**

The company discovered that agents who follow prompts to assume the sale have average conversion rates nearly 5% higher than those who do not follow the behavior.

But the results are even more compelling when exploring a level deeper. When agents follow prompts to upsell phone accessories, the average accessory revenue per chat is \$9.77, compared to \$3.69 if they don't perform the behavior - over 2.5x the revenue.

Similarly, when the agents follow hints to cross-sell the organization's home internet offering, home internet sales

are made in 3.3% of conversations; if they do not follow the hints, home internet sales convert only 0.5% of the time.

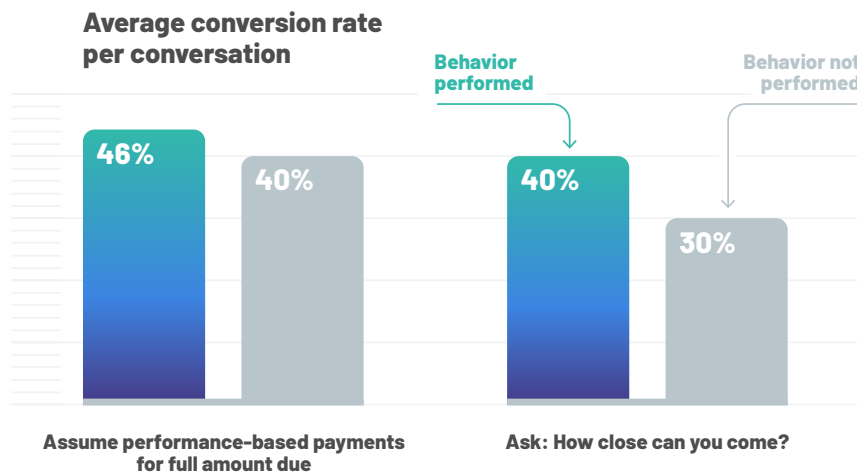
And to ensure that agents face no unnecessary roadblocks in performing this behavior, Cresta includes personalization through an integration to identify who ‘qualifies’ for home internet based on address eligibility.

**A Fortune 500 insurance company wanted to capitalize on missed income due to unsold plan premiums.**

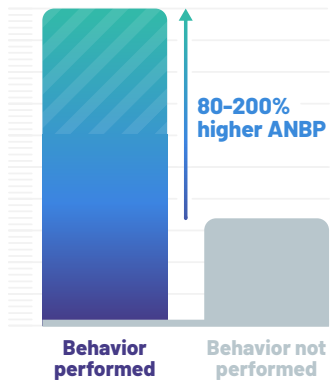
Through Cresta's insights, this company discovered that agents who followed upsell hints and asked key discovery questions sold significantly more than agents that didn't. Conversations where key discovery questions are performed have 80-200% higher ANBP (annualized new business premium) than conversations where these aren't performed in.

Specifically, when agents follow hints to upsell both cancer and accidental death premiums, they sell an average of \$43.24 and \$57.17 in premiums in these respective categories compared to \$2.99 and \$12.08 when they don't upsell either.

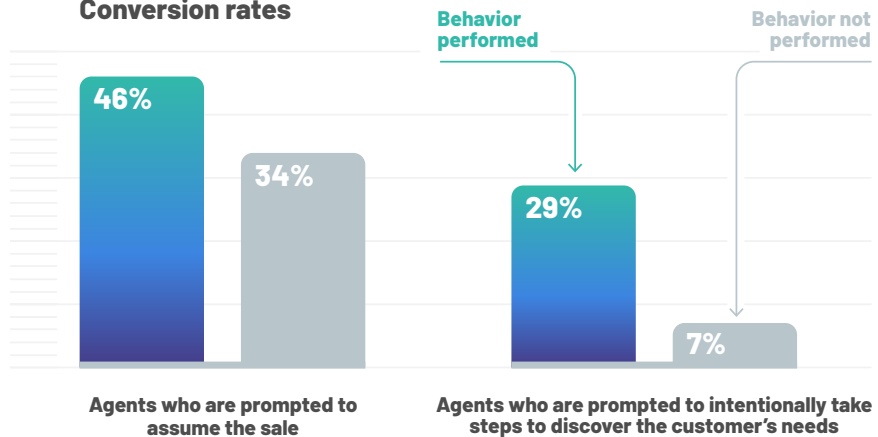
This represents 5-20x more in upsold plan premiums. This focused information shows the insurance company where to focus their attention and how to do it while quantifying the potential benefit.



**Annualized new business premium (ANBP)**



**Conversion rates**



**A hospitality company wanted to achieve more sales of high-end timeshares.**

With the team growing and some agents working remotely, managers at this large nationwide hospitality company needed better visibility into their agents' conversations to effectively boost performance of their 500+ agents. Their legacy tools required an external request process to get call recordings; this lengthy process meant agents received limited live support, and any customized coaching came weeks after the conversation. So, they partnered with Cresta to enable greater transparency and real-time support.

With the help of Cresta's generative AI, the company learned that agents who are prompted to assume the sale see conversion rates of 46%, compared to only 34% if they fail to perform the behavior. Similarly, in conversations where agents are prompted to intentionally take steps to discover the customer's needs, the sales conversion rate is 29%, compared to only 7% in conversations where they do not.

But equally important, the company also discovered that not all sales are created equal.

Discounted sales are significantly more likely when a price objection is detected from the customer – 58% of packages are sold at a discount when a price objection is present). However, a sizable number of discounted sales are made without the price objection detected (42%) – suggesting that agents may be leading with the discount rather than using it to overcome the objection.

Cresta's models helped the company discover that some "top producers" were discounting on a large percentage of calls (even if no price objection is offered), which may indicate a lack of value-building skill in those agents, presenting an otherwise-hidden coaching opportunity.

These are the sorts of customized results contact center leaders can expect from Cresta's three-step approach — now we'll dig into the identified steps that enabled these outcomes.

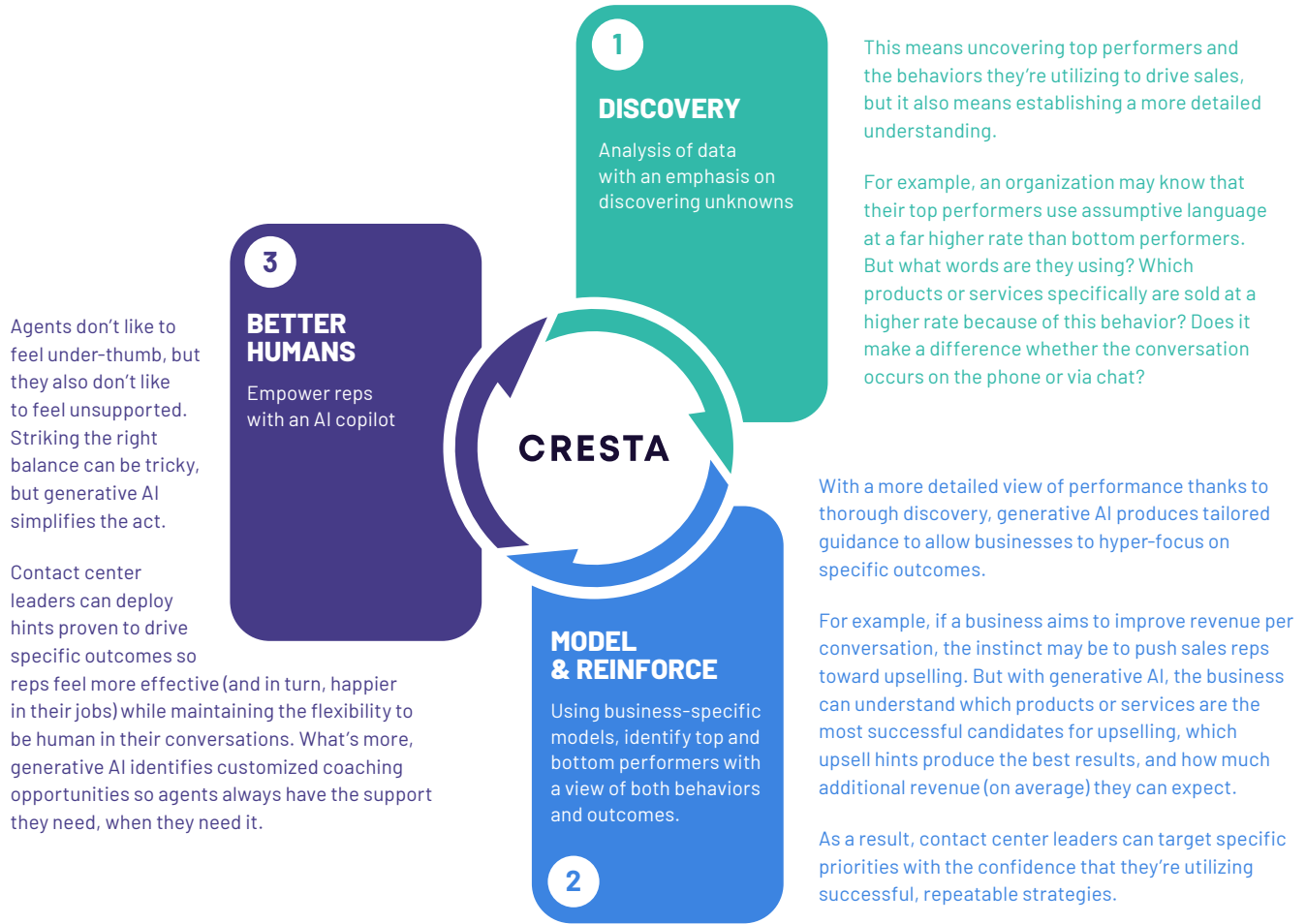
**CRESTA'S THREE-STEP APPROACH: How Generative AI Drives Dependable Outcomes**

Any rep will tell you that no two sales conversations are identical. And so, uncovering methods to improve sales performance necessarily requires a customized approach.

We know that behaviors like setting expectations and assuming the sale are employed by top performers generally, but in order to translate that knowledge into business-specific success, contact center leaders need an outcome-inclusive view of what's working (and what's not) to empower agents and improve sales.

To that end, Cresta's generative AI identifies key behaviors relevant to each business by ingesting thousands of hours of calls and providing customers with a diagnostic report used to adjust their current playbook, thus creating a new, more powerful one that incorporates the identified behaviors into Cresta's behavioral reinforcement hints.

Here's a deeper look at the three key elements Cresta leverages in this process:



**ZOOMING IN:  
A closer look at a big idea**

As with anything complex, interconnected, and multifaceted, Cresta's three-step approach to high-velocity sales requires a wide range of individual inputs to build the overarching system. In this case, those inputs are features: the complementary capabilities that allow Cresta's generative AI to complete each element in the process laid out above.

Some more of the features Cresta uses to **drive revenue growth** include:

- Value Discovery Assessment provides insights into your own contact center operations, discovering pivotal, KPI-driving moments in your conversations and quantifying their value.
- Behavioral reinforcement
- Real-time coaching to ensure agents have on-the-call support

- Knowledge Assist to surface relevant information, improving agents' confidence and allowing them to focus on best practices
- Auto Summarization and Note Taking so that after-call work (ACW) doesn't eat into productivity and agents don't get burnt out on rote tasks
- Outcome Insights that harness Cresta's powerful **Insights** capabilities to uncover a path to achieving specific and repeatable results

**EVIDENCE-BASED BEST PRACTICES,  
CUSTOMIZED FOR OUTCOMES**

As they say, knowledge is power. But not all knowledge holds the same power; while it's helpful to understand the key behaviors that close the sales performance gap generally, it's far more impactful to know how those behaviors can be applied most effectively in your organization, the specific outcomes you can expect, and the way that this will impact both your bottom line and your agents.

In the question of whether selling is more art or science, Cresta has answered with a combined option — one that works more like magic.

## 2024 Editorial Calendar

### JANUARY

**Future of Contact Center Employees**

### APRIL

**State of Generative AI**

### JUNE

**CX Trends, Challenges & Opportunities**

### AUGUST

**Modernizing Service Experiences With AI & Digital**

### SEPTEMBER

**Next-Generation Omnichannel CX**

### NOVEMBER

**Future of the Contact Center**

### FEBRUARY

**Strategic Planning For CX Operations**

February 9-11, 2023

### APRIL

**State Of Contact Center Technology**

April 6-8, 2023

### MAY

**New Standards For Customer Contact Performance**

May 25-27, 2023

### JULY

**Modernizing Service Experiences With AI & Digital**

July 20-22, 2023

### SEPTEMBER

**Customer Experience Trends, Challenges And Innovations**

September 14-16, 2023

### OCTOBER

**Business Continuity 2.0**

October 26-28, 2023

### DECEMBER

**Future Of The Contact Center: A Forecast**

December 14-16, 2023

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