

Gartner®

Gartner for Customer Service

The Connected Rep

Deliver better customer service by enabling reps with technology.



The future of customer service is connected

Customer service representatives report that their jobs are becoming more complex. Leaders are investing in training and hiring to equip their functions with better talent but still face a 25% median attrition rate.

To better support reps and deliver better customer service, it's time for a new technology strategy that Gartner calls the Connected Rep.

Why it matters

The Connected Rep is a strategy that bridges technology and talent to support reps' performance in a more scalable way. Through data and analytics, context, guidance and design, it enables reps to resolve customer issues and feel more satisfied with their work.

43%

of reps reported they were overwhelmed by the number of systems and tools needed to complete work.

Only

34%

of service and support leaders view their desktop investment as effective.

62%

of reps report that their systems provide them with unnecessary information.

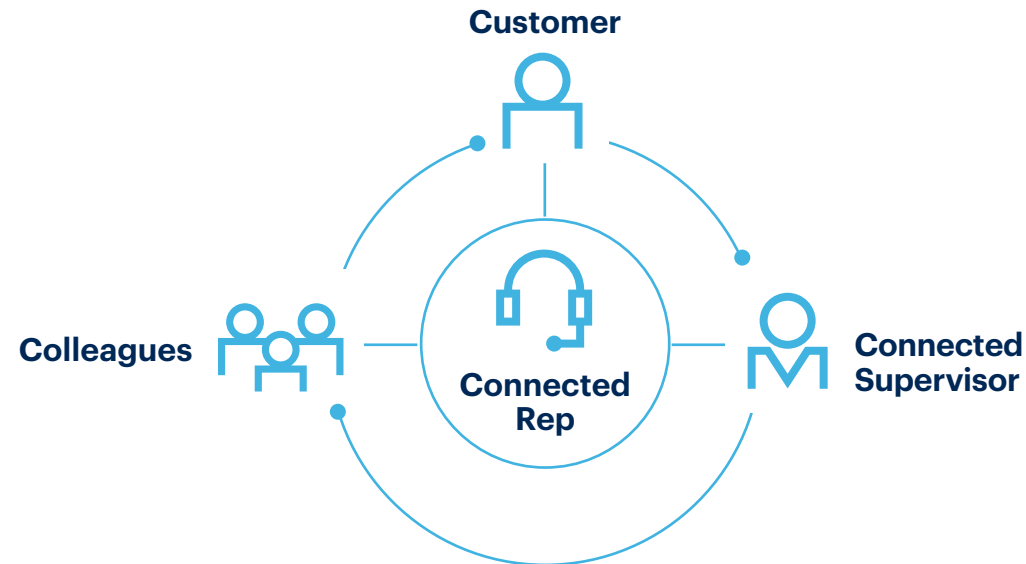


By 2026, customer service functions that implement the Connected Rep will **improve contact center efficiency by 30%.**

Source: Gartner

The Connected Rep

How technology enables better customer service delivery



Capabilities

Context

Access to a variety of customer information, including relationship with company and journey history

Guidance

Provides recommendations and insights, personalized and contextualized, for the customer; allows real-time collaboration with customers, colleagues and supervisors

Design

Presents complex customer information in an easy-to-use format

How the Connected Rep capabilities deliver business benefits

Context

Information that enriches a representative's understanding of customer interactions, for example:

- Customer name
- Products and past interactions
- Tenure or how long they've been waiting



A rep in a high-context technology environment is more likely to believe their systems **help them deliver first-contact resolution (FCR)** than that same rep placed in a low-context environment.

Guidance

Information or functionality that aids decision making and overall performance, for example:

- Predicted contact reason
- Intelligent next best actions (NBAs)
- Suggested phrases and coaching support



A rep in a high-guidance environment is **more likely to perform complex work** than the same rep placed in a low-guidance environment.

Design

How information is conveyed to the rep, for example:

- Well-organized containers or sections dedicated to specific topics
- Standard containers across business units for easy handoffs
- Just-in-time information to integrate with knowledge management system (KMS) and share suggested phrases
- Dynamic workflows linking customer activity in the digital channel to the rep in an assisted channel

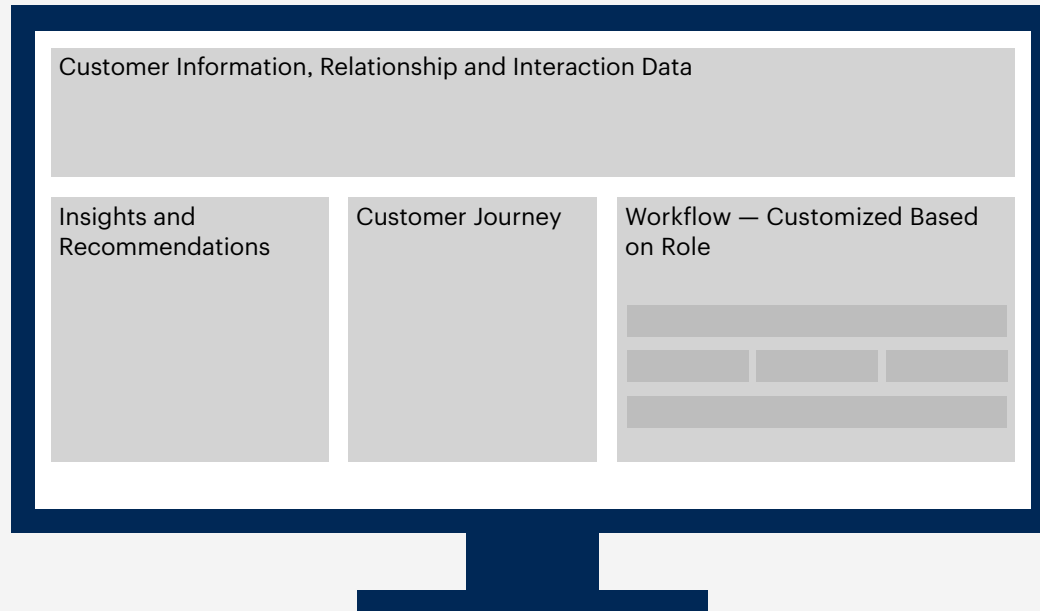


Well-designed systems and tools **promote quality and efficiency.**

Organize information with a modular design

Sample desktop design

Design your systems with “containers” to make them easier to use and maintain.

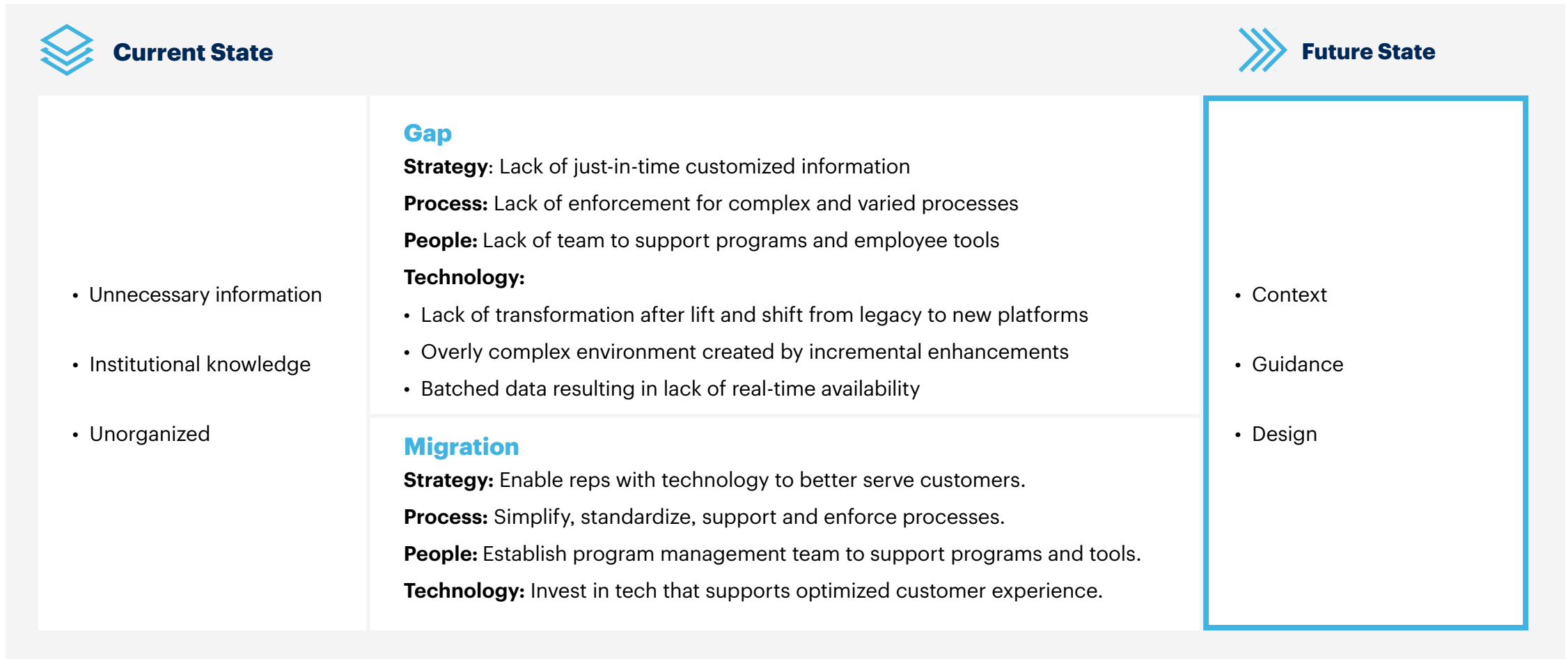


Rep Impact: Containers help with categorization and organization; they create common places for reps to always access specific information.

Leader Impact: Containers make agile management of desktops easier. Leaders can assign containers for development, testing and continuous improvement and update containers without impacting other parts of the desktop.

Source: Gartner

The Connected Rep: Strategic roadmap overview



Getting started

Securing funding

Because the goal of the Connected Rep is to provide context and enable reps, it doesn't necessarily require the most advanced technology. Based on your starting point and desired state, the funding required will vary.

However, it is important to recognize that the assisted channel is the most costly to serve customers and over half of customers are still ending their journey with your reps. Therefore, leaders have a strong opportunity to project business benefits that will support a strong ROI to help prioritize funding.

Who should be involved

Internal IT leaders:

- Create viable solutions and bring them to life.
- Provide skills and experience.
- Work with business leaders to select technology vendors.



Business leaders:

- Understand desired outcome and urgency.
- Provide use cases and knowledge of impact on customers, employees and company.
- Partner with IT to select technology vendors.

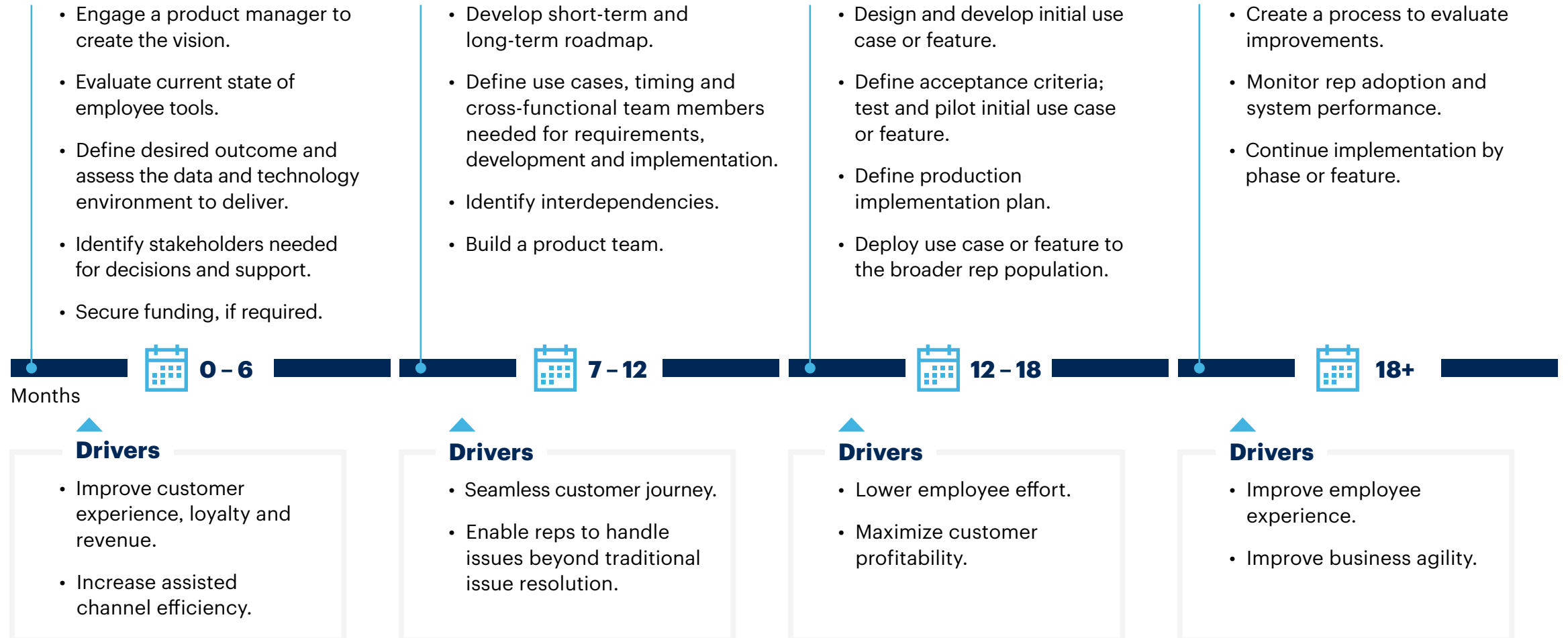


Leaders in sales, marketing, network, product, support, training, data and analytics, and more:

- Provide support and ongoing partnerships.
- Provide feedback.

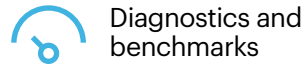


Strategic roadmap timeline for the connected rep



How Gartner helps customer service leaders adapt and stay ahead

Service and support organizations' technology investments have fallen short on solutions for frontline staff. Gartner can help customer support leaders empower reps to deliver efficient, high-quality and high-value customer experiences by augmenting their work with technology.



Diagnostics and benchmarks



Guides and toolkits



Expert inquiry



Expert research



Live events



Peer connections



Case studies and best practices



Webinars and online learning events



Document reviews

How Gartner supports you as a client

Diagnose current state



Assess the current state of your information services with [Gartner Customer Service and Support Score](#) for objective, peer-based performance standards.



Deploy [The Rep Experience Survey](#) for detailed insight into representatives' perspectives on technology, coaching effectiveness, productivity and disengagement, and work-from-home dynamics, so their organizations can equip reps to provide low-effort customer experiences.

Develop your plan



Map out your strategy to leverage technology to aid assisted-channel journeys and tailor customer experiences with the [Strategic Roadmap for the Connected Rep](#).



Learn how to [Communicate Your Vision and Gain Stakeholder Buy-In for Large Technology and Strategic Programs](#).

Execute and drive change

Schedule an inquiry with a Gartner expert to discuss:



- How can I equip my reps to deal with more complex issues?
- When investing in rep-facing technology, what's most important?
- What should be my first use case?
- How can we secure funding?
- How do I get buy-in and build the business case for my vision?



- Be on the lookout for upcoming content on:
- Examples of Connected Rep use cases and strategies to surface them
 - Guidance around successful product management of your rep desktop
 - Strategies for funding the Connected Rep

Actionable, objective insight

Explore more additional complimentary resources and tools for customer service leaders:

Research



Top Customer Service Priorities

Discover the top priorities for customer service leaders this year and beyond.

[Download Research](#)

Infographic



5 Ways to Enhance Your Self-Service Portal

Discover five common misconceptions about the customer self-service portal.

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eBook



The Future of Customer Service

The future of customer service is contextualized, predictive, value-focused and ubiquitous. Are you ready?

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Playbook



Recession Playbook for Customer Service Leaders

Learn how to optimize costs without impacting the customer experience, and position yourself for long-term gains.

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