

**Contact details**

Business Systems (UK) Ltd  
462 London Road, Isleworth  
Middlesex, TW7 4ED

Tel: 0208 326 8200  
Fax: 020 8326 8400  
Email: [contact@businesssystemsuk.com](mailto:contact@businesssystemsuk.com)

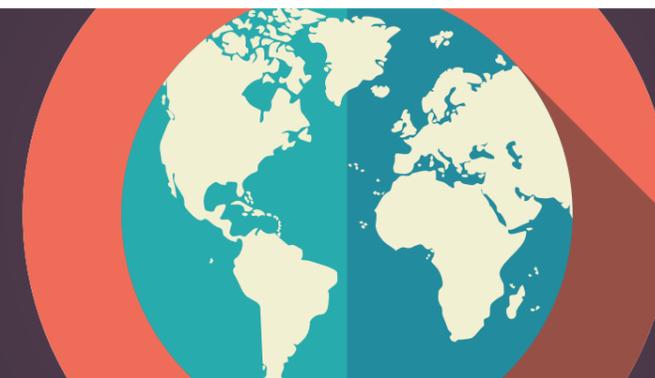
**Service & Support Enquiries**

Tel: 020 8326 8300



The Future of  
Front and Back  
Office Workforce  
Blending

“ Blending can be seen as the latest stage in the evolution of Workforce Optimisation (WFO) ”



## The Future of Workforce Blending

Some of the finest things in life are achieved by carefully blending components to accomplish a whole greater than the sum of their parts.

The best French vintners expertly blend varieties of grape to create the world's best wines; perfumiers use their refined sense of smell to blend different aromas into the most sought after colognes and eau de toilettes; Michelin-starred chefs make their names blending flavours, textures and colours from a rich variety of food to create award-winning dishes people travel from miles around to taste.

So if blending can achieve such great things in these walks of life, why should it not when it comes to the management of people?

The concept of workforce blending is based on the idea that organising staff into closed, linear job roles with discrete and separate responsibilities is inefficient. In particular, the argument in favour of workforce blending is that the traditional distinction between front and back office operations is arbitrary and no longer fit for purpose, serving only to create friction in workflow.

Instead, for reasons ranging from boosting productivity by making better use of worker time to providing an improved customer experience, workforce blending suggests that the barriers between front and back office should be torn down, and the skills and responsibilities that characterise each be shared more equally.

In this paper we will argue that, with its concern for improving the customer experience, blending can be seen as the latest stage in the evolution of workforce optimisation (WFO) strategies. Originating in customer-facing operations like the contact centre, workforce optimisation uses data and

technology to marshal resources more efficiently, improving service levels, improving the customer journey and boosting workforce productivity.

But as customer expectations continue to rise, there is growing recognition that it is no longer sufficient to make this a focus solely for the front office. While optimisation solutions for the back office have grown in popularity, we believe the modern business needs an even more comprehensive approach - one that optimises front and back office resources in complete harmony.

We need look no further than the changing nature of customer interactions to see why this is necessary. The days of the majority of service requests being made through a single channel managed by a single department - are fast disappearing. Customers have a growing list of channels to choose from if they wish to communicate with a business. Thanks to mobile technology, they can also get in touch whenever and from wherever they like.

This multiplication of contact and service channels has blown old concepts of who is responsible for service out of the water. To meet the growing demand for ultra-responsive, agile, premium quality customer experience (CX) across all touchpoints, it's all hands on deck. Businesses need to take a blended approach which looks to optimise all resources, human and technological, front and back office.

In outlining our vision for the future of workforce blending, we will start by taking a look at the strengths and limitations of current workforce optimisation (WFO) approaches, and what it is precisely that blending can add to the mix. Then we will take a look at some of the challenges facing the closer integration of front and back office operations, before looking at how OPX, an award-winning back office WFO application, already offers the capabilities to resolve these snags and help create reactive, agile cross-departmental operations teams that share a focus on delivering an outstanding CX, wherever they happen to work.

## Beyond WFO: Why Blending?

Back in 2010, HMRC commissioned PwC to undertake a study of private companies which had sought to implement closer integration between front and back office integrations link to this website - <https://www.gov.uk/government/publications/private-sector-operating-models-front-and-back-office-integration>.

When the report was published a year later, it concluded that closer alignment of front and back office brought benefits such as improvements to customer experience, reduced costs, increased operational efficiency and reductions in worker absenteeism due to better working conditions. The report also outlined a number of 'choices' companies had to make in how they approached integration, which included the use of technology and 'work blending', the deployment of multi-skilled staff to carry out both customer-facing and administrative tasks as required.

The concepts we are discussing in this paper, - closer alignment of front and back office, blending of operational roles and skill sets, the use of technology to achieve these ends and the benefits they bring - are nothing new. Yet there is a feeling that the majority of businesses are yet to get on board. As recently as 2017, the International Customer Management Institute concluded that businesses were failing to make best use of the capabilities of workforce optimisation technology.

Our contention is that the key reason for this is that WFO principles are not being applied across end-to-end business operations. Confined to the contact centre, they can only ever have a limited impact.

Workforce optimisation grew out of a 'more from less' business philosophy. It is based on the understanding that, if you can access key performance data in real time and make it available to everyone, you can start to drive a wide range of improvements, such as raising service levels, boosting customer satisfaction, cutting operational costs and reducing duplication and waste.

Information is key to workforce optimisation. If people know precisely what they need to do to meet call time targets or reduce queue times, they will raise their game. If you have the right tools to analyse historic call volumes, you can predict staffing levels and schedule tasks with greater accuracy. If you can analyse calls in play and match queries to staff with the right skill sets, you can improve first-time resolution rates. If you can automate large parts of the operational processes, you can cut down on human error and boost speed and efficiency.



According to Gartner, one of the key characteristics of a WFO solution is that it “integrates disparate contact centre technologies—including contact centre performance management, e-learning, interaction analytics, quality management and workforce management”. The big question this begs is - why just in the contact centre? As customer touch points diversify and businesses increasingly compete on the quality of the CX they provide, there is no need to restrict optimisation to the contact centre. If WFO solutions are built on the ability to integrate disparate technologies as Gartner claims, then why not apply them across all systems?

The 2017 Forrester CX Index showed that in 2016-2017 twice as many UK brands have **worsened** in the customer experience compared to 2015-2016

Many businesses also remain stuck in the mindset that customer service is something delivered by frontline agents deployed specifically for that purpose. The truth is that the majority of customer queries and requests are not dealt with ‘there and then’ at first point of contact - they are referred to the back office to be processed. Optimising back office operations in the same way you would the contact centre - with SLAs and targets for completion times and communication, for example - leads to quicker resolutions and cost savings through greater efficiency.

Going a step further and optimising front and back office operations in tandem - taking, in other words, a blended approach - can drive even greater gains. Here are 10 ways workforce blending can deliver significantly improved outcomes in terms of customer experience and overall operational performance:

- 1 Shared SLAs across front and back office ensure everyone is working to common goals, e.g. the best outcomes possible for the customer.
- 2 This also helps to achieve consistency of service across channels and at different stages of the customer journey, supported by better information sharing.
- 3 Closer integration of workflows leads to a more seamless referral process, meaning swifter resolutions.
- 4 Real time data sharing means customers can always be kept in the loop with how a query or request is progressing, increasing satisfaction levels.
- 5 Increased visibility through end-to-end analytics makes it easier to identify the most effective ways to make further service improvements.
- 6 Comparative analysis of different operational areas also helps understanding of the value add at each point in the journey, and therefore where to focus resources and improvements.
- 7 Sharing workloads across front and back office ensures there is always capacity to meet demand even during the busiest periods, without sudden increases in waiting times and abandonments.
- 8 Likewise, during lulls in service activity, it means that other tasks can be allocated to front office staff, maximising overall productivity.
- 9 Staff can understand their own performance in the context of the whole business, helping to boost motivation and morale.
- 10 Likewise, the opportunity to work across multiple disciplines afforded by a blended approach boosts skill levels and empowers staff to seek further professional development.

‘Some of the finest things in life are achieved by carefully blending components to accomplish a whole greater than the sum of their parts’



# Different Cultures: The Challenges of Blending

If there is one reason why the benefits of a blended approach have yet to be fully realised by many businesses, it is because the integration of front and back office operations presents certain challenges. These tend to be cultural as much as they are structural, in so far as they have arisen from the tendency to separate front and back office functions as a matter of habit, not from any inherent incompatibility.

Still, as with any kind of change in conventional and long-established business practices, old habits die hard. The business that wishes to embed more of a customer-facing focus throughout its business cannot ignore the fact that, up until this point, the company's administrators, analysts, strategisers and production workers have had quite different priorities from its sales and service staff.

Aligning distinct sets of performance objectives, process approaches and skills so that a) everyone remains happy and b) overall outcomes improve is a delicate balancing act. When you throw technology into the mix, e.g. introducing new communication channels to the back office or robotic process automation into your contact centre, it becomes a real test of your change management capabilities.

Here are four of the key cultural differences between front and back office operations that need to be taken into account when planning a blended approach.

## 1] Service Level Expectations

Let's be clear - it's not that customer service or customer experience have never mattered in the back office. Of course everyone wants positive customer outcomes. It's just that front and back office often come at the challenge of keeping customers happy from different angles.

For the contact centre agent, service levels are determined by speed and agility, by never leaving the customer waiting and wanting, by delivering a positive outcome first time every time. But for the departments that have to sign off on mortgages or process insurance claims, being thorough and accurate takes precedence over speed. Both sets of priorities are important for delivering an outstanding CX, but this can be a difficult circle to square operationally.

## 2] Workforce Scheduling

Aiming for a fully blended approach where front and back office teams share responsibilities traditionally assigned to one or the other runs into the problem of different scheduling priorities. Customer-facing operations are much more vulnerable to peaks and troughs in demand. Because front office SLAs are defined by speed, from answering a call or query quickly to delivering a timely resolution, the worst case scenario is to not have enough agents working to keep up with demand. Due to the difficulties of predicting demand accurately, businesses tend to err on the side of caution and over-staff, leading to lots of under-used labour hours when demand takes a dip.

Because time has traditionally been less of a factor, getting staffing levels right for the back office is much easier. But once you start to align SLAs and make task completion time a factor in the back office, you expose yourself to the same issues of responding to demand. Without intending to, you could easily end up over-staffing across all departments, undermining any efficiency gains you hoped to make.

## 3] Characteristics and Skills

There's no controversy in the fact that certain job roles and responsibilities suit certain personality traits and aptitudes. When recruiting for the contact centre, for example, HR managers might typically judge candidates on their communication skills, personal manner, temperament, ability to multi-task and willingness to work flexible shift patterns.

Across the back office, however, you might want to prioritise characteristics such as technical knowledge, eye for detail, problem solving and ability to manage a project or process from start through to conclusion. You also have to take into account that the back office is likely to demand a much broader range of desirable character traits and skill sets, simply because it covers a much broader range of operations.

The challenge from a HR point of view is how to ensure people have an appropriate range of skills to blend job roles. If you are asking back office staff who are not naturally inclined towards communication or have little experience dealing with customers to chip in with front-line service, are you risking diluting the quality of what your specialist agents can provide? And if you start expecting contact centre and sales staff to also be adept at a range of administrative tasks, are you compromising your ability to recruit people with excellent customer service credentials, because they may lack other skills you need?

## 4] Technological complexity

Another argument for why workforce optimisation has not easily translated to the back office is that behind-the-scenes operations are usually much more complicated and diverse than the front office. Indeed, depending on the nature of the business, customer-facing operations may only account for one or two departments in the entire business, a contact centre and an in-store sales operation. These are relatively easy to integrate and manage, with CRM, EPoS and contact centre systems providing the necessary interfaces and intelligence.

In the back office, however, any mid-sized business upwards is likely to have many more departments, such as finance, IT, marketing, production, development, logistics, HR and so on. All of these will have their own IT systems, some at advanced stages of digitisation, others using legacy equipment to support largely manual processes. In the traditional contact centre, optimisation is relatively straightforward because all relevant data can be sourced from a single system, i.e. an ACD. In the back office, things look very different.

On that point, customer-facing operations are facing their own increasing technological complexity driven by the emergence of omni-channel service options. The old guard of telephone and email is being supplemented, and may eventually be superseded by, contact interfaces such as IM, chatbots, self-help web portals and social media. Even telephony is changing with the growth of AI-backed IVR systems.

This means that, on top of everything else, expectations around how service is delivered are changing. Increasingly, the old-style agent is not where customers expect to find answers to queries and solutions to problems, preferring instead self-help, peer-led and automated options. In the digital age, there are important questions for businesses to ask themselves about the nature of service provision, and where responsibility for it should lie within their organisation.

**70%**  
of customers are using multiple channels to transact and communicate with companies

**75%**  
of customers expect a consistent experience wherever they engage with your brand



“Customer facing operations are coming up against increased technological challenges driven by the emergence of omni-channel service options”

## OPX: A Technological Solution

From managing cultural change to aligning strategic priorities to integrating data streams from multiple sources, front and back office workforce blending presents its challenges. But thanks to the increasing sophistication of analytics, automation and workflow management platforms, technology provides us the means to overcome these hurdles.

OPX is one platform which combines all of these capabilities. An award winning back office workforce optimisation solution, OPX possesses the right tools and the right level of advanced functionality to make it ideal for integrating front and back office. Indeed, it has been described as a digital operations transformation suite, providing modular, flexible, easy to implement solutions for businesses that want to see a step change in their human resourcing and operational management.

In short, OPX provides everything your normal WFO suite would provide - advanced analytics and reporting, smart work allocation and case management, robotic process automation and more. The key difference is that it can apply these tools across the board to multiple systems at once, not just in the contact centre. As a platform agnostic cloud solution, it is not only simple and affordable to deploy, it is compatible with any existing IT platforms and highly scalable.

In terms of core capabilities, OPX can:

- Orchestrate and automate workloads
- Manage inbound demand channels
- Automatically allocate resources, regardless of location
- Adapt scheduling in real time according to need
- Blend operations across the back office and front office
- Blend deployment of human and robotic agents
- Via its Management Information (MI) tool, provide continuous in-depth reporting and data to provide end-to-end operational insight

All data, be it about employee productivity, resource utilisation or overall operational performance, is accessible via visual dashboards, helping to make complex analysis of core issues intelligible and intuitive to grasp. The intelligent work allocation tools break up complex tasks and automatically allocate to staff with the most appropriate skill sets, prioritising based on an ongoing assessment of demand.

Similarly, a Decision Engine automates things like customer contact follow ups when they can be determined by hard and fast rules, while RPA automates high-volume transactional processes to support dynamic scheduling and allocation across multiple departments. This takes the pressure off staff, speeding up processes and freeing people to deal with more complex tasks.

Sharing workloads across front and back office ensures there is always capacity to meet demand.



## Solving the blending problems

OPX promises numerous operational benefits, but what about the challenges with blending front and back office operations that we have identified? How does the technology help to remove those barriers?

Here's a quick summary of why OPX is ideal for achieving a blended solution:

- In terms of SLAs, there will always be differences in timings between front and back office due to the differences in priorities and the fact that some administrative tasks just take time. But more than demanding everything is done in the instant, what customers really want is a clear indication of when a task will be completed that they can trust. With its robust analytics and smart allocation systems, OPX can easily be used to feed information through the inbound interaction systems to give customers accurate estimates or updates on completion times.

- With real-time cross-departmental intelligence about scheduling, task allocation and demand all in one place, businesses can rowback on their tendency to over-staff in the contact centre to cope with unpredictable peaks in traffic. If back office staff are instead trained to pick up the slack when things are busy - with OPX assessing when that needs to happen and triggering support appropriately - companies can achieve significant cost savings in their staff scheduling. Similarly, if there ever is spare capacity in the front office, OPX can be used to allocate admin tasks to help improve overall efficiency and productivity.
- To assist back office staff providing front line customer support at expected service levels, OPX has a module called Scriptflow which is ideal for supporting occasional agents through calls and messaging with easy-to-follow prompts. It can also be used to create scripts related to back office tasks to provide front office staff with guides on what to do and how whenever they are asked to chip in with admin work. The RPA system can be used to bring up the right script for the right task so staff always get the support they need, and the scripts can also be used for training purposes to broaden the skill sets of all workers.
- As digital channels grow increasingly important in customer service provision, blending is not just a matter of integrating front and back office staff - it needs to take account of robotic operators and other automated systems too. There will always be occasions where manual intervention is needed on automated services, due to some necessary piece of data being missing or some other complication. The decision engine built into OPX is not only sophisticated enough to trigger these interventions, it can also assess current scheduling and demand levels in real time to refer the matter to the best placed person in terms of skills and availability to handle it.
- Another issue arising out of the rapid multiplication of touch points available for customers is how to keep track of interactions across all of them. Solutions like the OPX Customer Integration Management Systems (CIMS) provide important information about the customer journey across different channels. So if, for example, a customer abandoned trying to renew their insurance or apply for a loan halfway through using the online wizard, or had made queries using a chatbot, an agent would be able to see exactly where they got up to and put in a call to complete the transaction, picking up exactly where the customer left off.

## Summary: The Right Blend for Business

As businesses continue to undergo the wide-ranging process of evolution often referred to as digital transformation, they are having to contend with the fact that their customers are well ahead of the game. Thanks to mobile, thanks to ecommerce, thanks to the staggering variety of choice available online, thanks to social media, consumers expect to be able to get what they want, when they want, how they want.

And the service had better be A+, otherwise they will post a bad review on Google or Trustpilot, and complain about it on Facebook and Twitter.

That is why 75% of business leaders rank improving customer experience as a top strategic priority for their company. But in the context of rapidly evolving technologies and multiplying digital channels, the old rules for how you deliver an outstanding customer experience is changing. New circumstances now demand a radical rethink about how service is provided.

This is why workforce blending is coming to the fore. With the stakes raised ever higher, the old distinctions between front and back office are getting in the way of providing service that can keep up with demand. Responsibility for the customer experience can no longer be isolated within a single segment of the business. It requires all departments to be working in harmony with the highest value placed on delivering fast, efficient, hassle-free service that keeps the customer happy.

There are other benefits to workforce blending in addition to encouraging customer loyalty and repeat business through operational excellence. The more streamlined, integrated and waste-free processes are, the more costs you can cut and the more productive everything is. An Ovum study into the role of WFO in the back office highlighted the benefits of having technology which automated scheduling, managed output and reported on performance. These were

not surprisingly identical benefits to those in the contact centre, from making resource allocation more efficient to informing continued professional development (CPD) programmes.

The adaptation of WFO technologies to make them suitable for deployment in the back office represents a major step forward in the quest for delivering better CX and improving business efficiency. Platforms like OPX, with its agnostic cloud architecture, is built for rapid, straightforward deployment across multiple systems at once. This is designed to accommodate the greater complexity of the back office. But has the added benefit of meaning front and back office systems can be brought into alignment, too.

By implementing workforce optimisation across both front and back office using a solution like OPX, businesses can utilise resources more efficiently to create a better customer experience. In order to maintain full visibility across rapidly multiplying channels and touchpoints, in order to get the best out of both human and robotic service providers, dynamic and agile operations team need solutions like OPX to help manage interactions and resources to respond to all service requests in the best way possible.

“  
Responsibility for the customer experience can no longer be isolated within a single segment of the business”

