

TALKDESK EBOOK

# The changing role of store associates and customer service agents

**:talkdesk®**



Sarah Young  
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BRAND NEW



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# Introduction

Retail is undergoing a major customer experience transformation accelerated by the pressures of the pandemic. Trends in digital transformation that had been gaining traction prior to COVID-19 were suddenly fast-tracked as physical locations temporarily closed and the key touch points were primary digital. The lines between in-store and online customer experience (CX) blurred as buy-online-pick-up-in-store (BOPIS), appointment-based shopping, and curbside delivery became the way many retailers stayed in business. Shoppers needed (and wanted) the fastest, easiest, and safest way to engage with

their favorite brands. And, retailers responded with empathy and care, shifting their expectations of store associates and customer service agents to accommodate these new demands.

With these trends settling into a more permanent place in retail CX, brands are now looking at how these new customer expectations are reshaping the retail landscape—and reimagining the role of their stores, store associates, and agents. The challenge has become providing an exceptional and unified customer experience through blended physical and digital

channels. Consequently, retailers are reexamining the role of the contact center for its ability to go beyond traditional service inquiries and serve as an engagement and revenue-generating center with customer intelligence and AI assistance empowering employees to deliver a new form of CX.

This ebook explores how these shifts are changing retail customer experience, the roles retail associates and customer service agents play and how retail CX leaders can leverage the contact center to capture emerging opportunities.

**Moving into the next normal, retailers are focusing on how physical and digital stores can support each other to drive greater revenue and customer engagement.**

# I. Reshaping the retail experience

It's an understatement to say that 2020 was a difficult year for retailers. Everything that had once been fairly predictable was upended. From when stores would be open, to how people would shop, to the shifting time and channels they would use to engage with brands. Retailers kept their doors open through digital and contactless commerce, and customer service soon found that work-from-home and stay-at-home orders meant people changed how and when they reached out for support.

**Retailers were forced overnight to play a responsive game that required agility and flexibility—made possible in large part by cloud-based applications and integrated systems.**





## II. A blended journey

The line between a digital retail experience and in-store retail experience has blurred and shoppers now move fluidly between online and offline channels. **They expect a seamless, contactless, convenient, and connected experience**—viewing the brand as one experience, without differentiating between channels. A customer may buy an article of clothing in a store, try it on at home, order a different size online to have it shipped to their home, and then return the wrong size through the mail. They might ask a store associate at the customer service desk about their online order or ask a store associate to help them find an item online.

This way of experiencing retail is, in some sense, what CX professionals have been striving for: a seamless “one brand” experience. Still, the blurring of CX across channels comes at a time when technology is mature enough to truly support its success. At the core of this unified brand experience is the cloud contact center.



# III. Expansion of contactless commerce

Shoppers have grown accustomed to retailers providing even more immediate, contactless, flexible options such as BOPIS, appointment-based shopping, and curbside delivery—which require store associates to now do order fulfillment and delivery.

Before the pandemic, appointment-based shopping was predominant in luxury categories, but today, retailers of all types are leveraging its power. Apparel brands, mattress companies, sporting goods, and even automotive stores are using appointments to facilitate virtual and in-store engagement that is personalized and safe. The use cases of appointment retailing are also expanding—from one-on-one shopping to consultations, value-added services, fulfillment, and pickup services.



195%

According to Adobe, in May 2020, BOPIS (buy-online-pick-up-in-store) had grown 195% compared to the previous year.



60%

By some estimates, the overall demand for “click & collect” fulfillment grew more than 60% throughout 2020.

**Consumers now expect any retail employee to have fast and accurate answers to all their questions, whether in-store or online.**

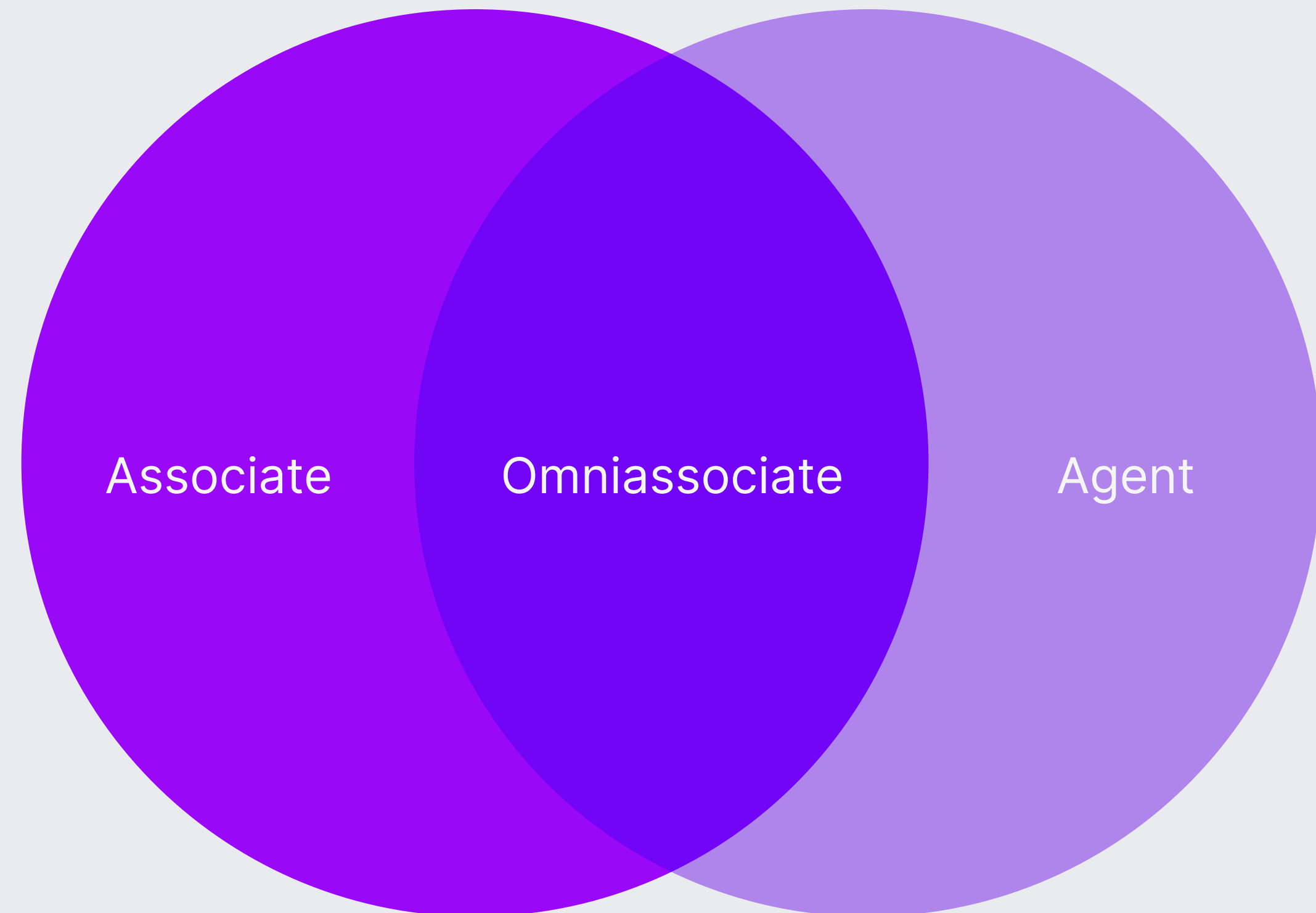
# IV. Expansion of clicks-to-bricks

The physical store is changing its strategic importance. According to [Coresight Research](#), retailers in the United States have announced 3,199 store openings and 2,548 closures from March 2020 to 2021. Legacy brands like Macy's are beginning to move out of traditional shopping malls and into smaller suburban centers, where many of their customers now work from home, and parking lots enable curbside delivery. With the increased availability of retail spaces and more affordable rent, direct-to-consumer (D2C) brands are finding new opportunities to open select physical locations or partner with big-box retailers to provide the extra layer of engagement for their brands.



# V. Associate + Agent = the Omniassociate

The blending of the customer journey paired with customer expectations for speed, choice, convenience, and channel fluidity has blurred the lines and roles between traditional customer service agents and in-store associates. Retailers are starting to see both agents and associates as key brand representatives, with the mission to provide their customers the possible experiences possible. This blurring of lines has given rise to the term ***omniassociate***—an effort to capture the way these roles are being reshaped by an omnichannel retail experience and customer needs.





# VI. The new brand ambassadors

**There's no doubt about it—the role of the customer service agent in the contact center has changed.**

Customers reach customer service agents for help finding products, with questions about product details, and requests for assistance with purchases, orders, returns, curbside rescheduling, and delivery issues. **Agents are often expected to have a familiarity with the physical store (hours, inventory, etc.), as well as the online store, and answer questions about both.** The rise of digital-native D2C brands expanding into physical store footprints has previously digital-only associates increasingly doing both. In many cases, DTC associates, whether in-store or online, process orders for customers in the same manner: through a tablet or mobile device. Customer service agents are also serving as virtual advisors, shopping consultants, and video shopping appointment hosts.

The role of the store associate has evolved as well. With so many new demands, and stores having to reallocate resources during the economic uncertainty, employees have been asked to do more than ever before. Store associates now frequently play multiple roles:

- Helping customers in store.
- Stocking shelves.
- Cashiering.
- Fulfilling and servicing orders (in-store and online).
- Handling returns (from in-store and online purchases).

- Social media marketing and brand ambassadors.
- Answering product questions.

Beyond the practical aspects of this, during the height of store closings, some brands sent their store associates home. At home, they frequently served as traditional customer service agents.

**They are expected to know the digital channels as well as the physical store, and customers turn to them for assistance regardless of channel.**

# VII. Upskilling your omniassociates

Retail employees need to take on new skills and knowledge to fill the gaps and meet customer needs. Those who rely on disconnected systems and multiple sources of customer information have a painful time delivering the smooth CX that customers expect.

As retailers embrace the new landscape and the new roles employees play, they are looking at ways to support their success. This is where cloud contact center, workforce management, and AI assistance technology take center stage.



# VIII. Equipping omniassociates for success

For omniassociates to succeed in their roles as brand ambassadors, they need a 360-degree view of every customer. **Customer intelligence is the data that drives great customer experiences**—the more the omniassociate knows about the customer without having to ask, the better the experience feels to the customer.

Customers want retail technology that follows their journey across every channel and delivers on their expectation of not having to repeat themselves.

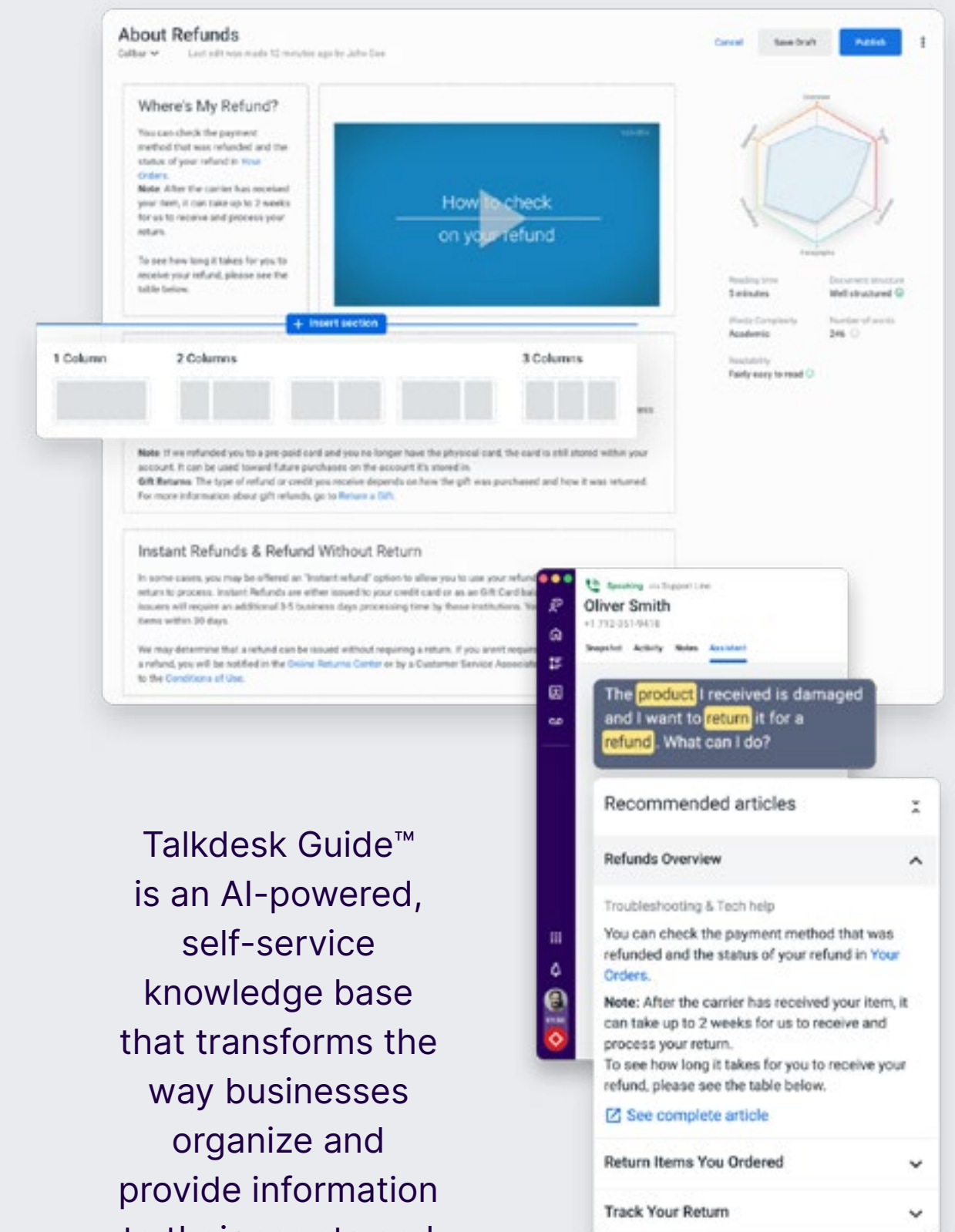
Many retailers have been implementing various pieces of the omnichannel experience with different types of

software and applications that help with different stages of the journey. They've struggled with integrating these various systems in a connected way that is complex on the backend but feels easy to end-users and customers.

More recently, retailers are turning to the capabilities built into cloud contact centers and exploring how the contact center can automate processes and become the central hub of customer engagement and experience.

An innovative retail cloud contact center solution not only integrates out of the box with other core systems (pulling data into one interface) but also provides a way to track customer interactions, conversations, and sentiment across channels, summarizing interactions automatically for omniassociates.

Cloud contact centers can also provide AI assistance to give omniassociates the contextual expertise they need during interactions, intelligently routing complex calls to internal experts, and supporting with all the details, guidance, purchasing capabilities, and solutions to help the customer.



Talkdesk Guide™ is an AI-powered, self-service knowledge base that transforms the way businesses organize and provide information to their agents and customers.



# IX. Expanding the role of the contact center

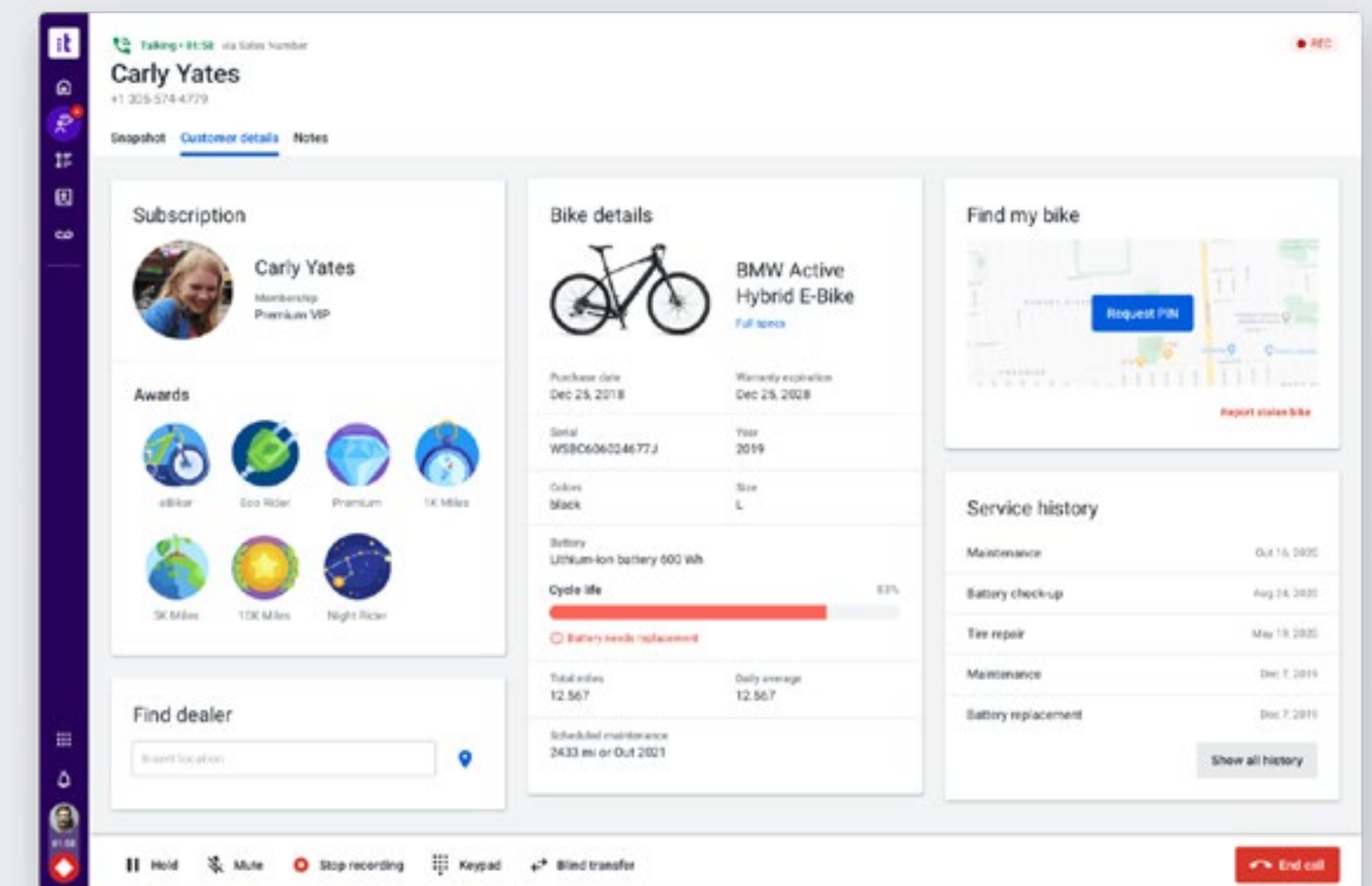
**Moving your contact center to the cloud is the first step in ensuring your omniassociates are set up for success.** A majority of brands and retailers have hybrid contact centers that utilize both on-premises and cloud technologies. But only innovative cloud contact centers deliver the full benefits—including pre-built integrations with other systems and applications needed to ensure data flows into a single interface.

For your omniassociates to have a holistic, real-time, and historic view of the customer, they need to harness customer data that is held in other systems and integrate it into the retail cloud contact center. The more data is available to omniassociates, the more accurate and personalized service they can deliver. Retailers must ensure that store associates and digital associates have access to the same

information—whether it be call recording transcripts, insights into what the customer tried in-store, or what they bought or returned through any channel—to provide consistent brand experiences.

Likewise, agents and associates need to be trained for the expanded roles they are expected to play, including cross-selling, upselling, and core tenets of customer service.

**Innovative cloud contact center solutions are easy to use and require minimal training, making it simple and fast for agents and associates to use.**



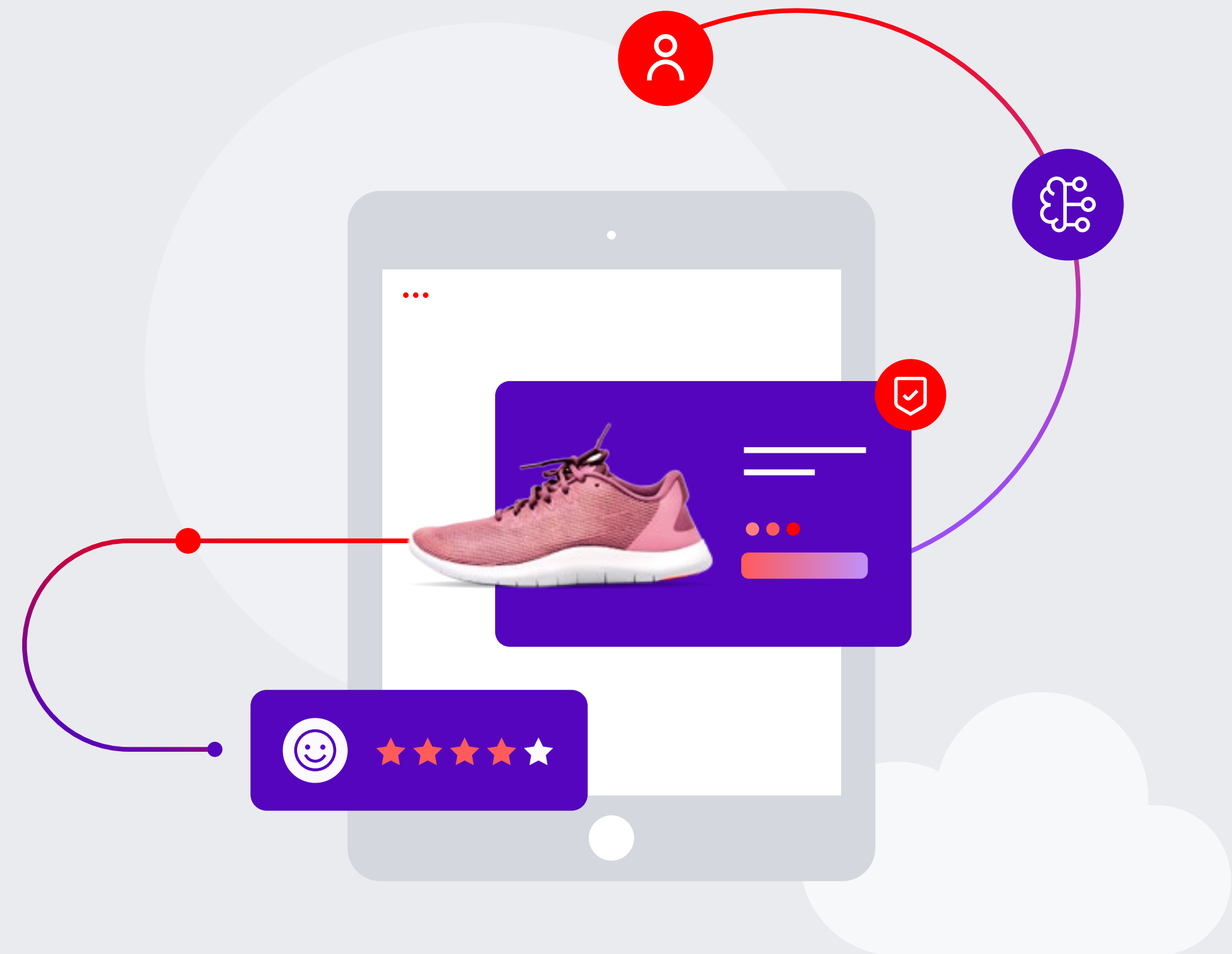
Talkdesk Workspace™ unifies all the tools and data your agents need on a “single pane of glass,” providing streamlined workflows and rich customer context that empowers them to work more efficiently and effectively.

# Next steps

Retailers have the opportunity to enhance speed and quality of customer engagements, freeing up omniassociates to double down on human connection rooted in meaning and empathy.

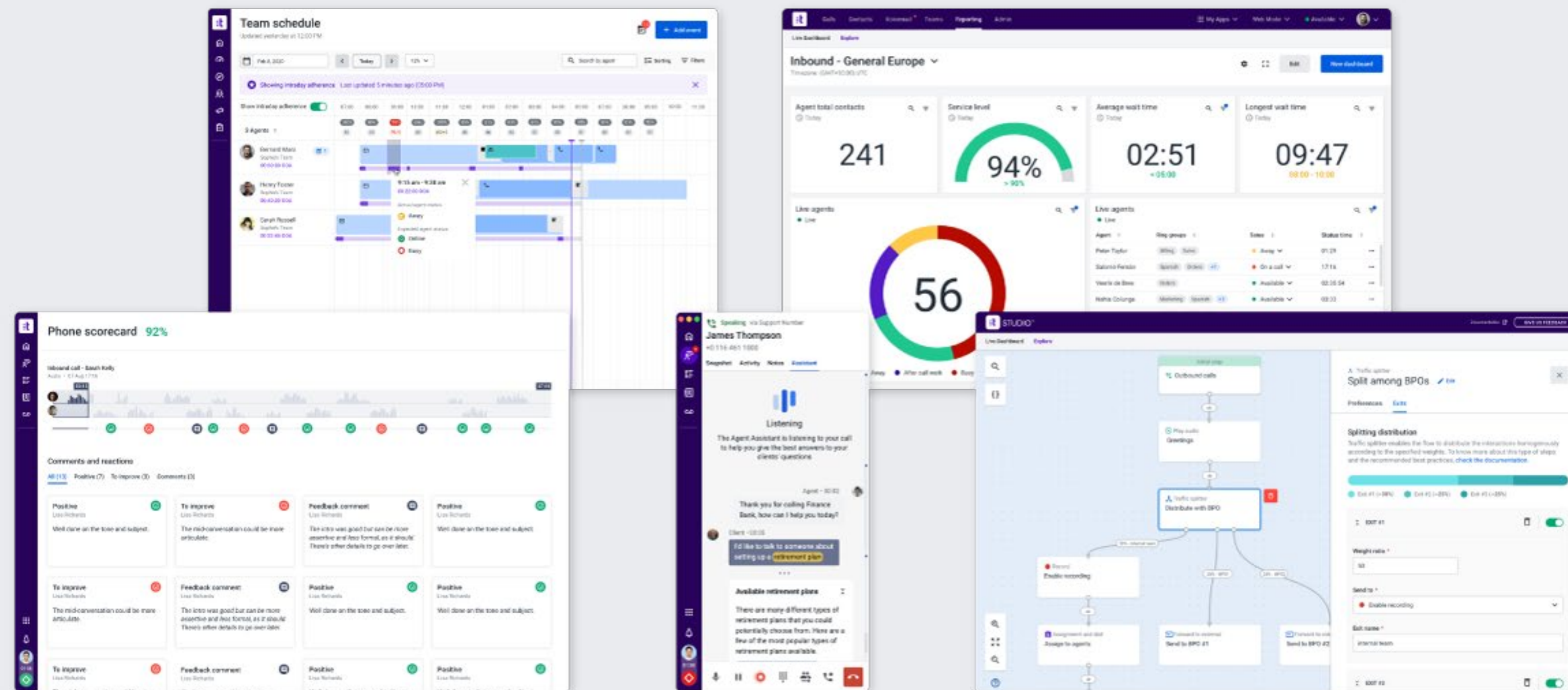
Talkdesk is here to help you harness the opportunities of a changing retail landscape with a next-gen retail cloud contact center built to deliver connected, end-to-end, omnichannel shopping experiences.

With an intuitive, easy-to-use interface, full integrations and deep customer intelligence backed by AI analytics, Talkdesk empowers omniassociates to deliver the next generation of customer experience in the ever-changing world of retail.





# An end-to-end solution for delivering great customer experiences



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[www.talkdesk.com](http://www.talkdesk.com)

Talkdesk® is a global customer experience leader for customer-obsessed companies. Our contact center solution provides a better way for businesses and customers to engage with one another. Our speed of innovation and global footprint reflect our commitment to ensure businesses everywhere can deliver better customer experiences through any channel, resulting in higher customer satisfaction, cost savings and profitability. Talkdesk CX Cloud™ is an end-to-end customer experience solution that combines enterprise scale with consumer simplicity. Over 1,800 innovative companies around the world, including IBM, Acxiom, Trivago, and Fujitsu partner with Talkdesk to deliver a better way to great customer experience. Learn more and request a demo at [www.talkdesk.com](http://www.talkdesk.com)