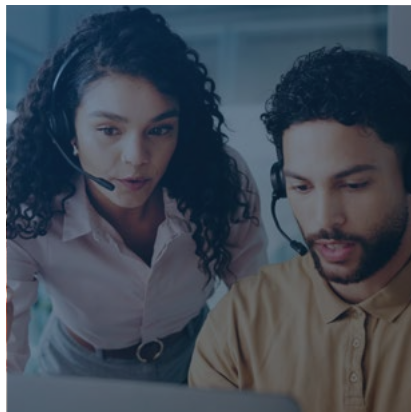
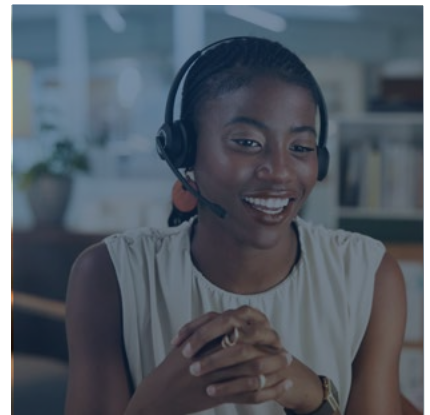
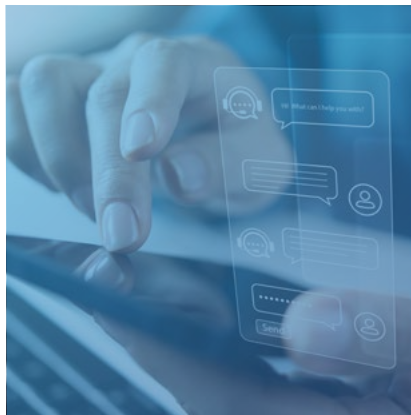




Execs In The Know



CX AGENT INSIGHTS:

PERSPECTIVES FROM THE FRONT LINE

Published May 2026



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INTRODUCTION

The customer experience (CX) conversation has long been centered on strategy, technology, and the customer journey itself. Yet, at the heart of every interaction, every resolution, and every moment of truth is the agent. Their experience, perspective, and ability to execute are what ultimately define the most complex and important customer experiences that get delivered. This research is designed to elevate the voice of the agent in a unique and powerful way.

Through direct surveying of agents across a balanced mix of internal and outsourced environments, this research captures a grounded, unfiltered view of what it means to operate on the front lines of customer care. From onboarding and training to tools, processes, and emerging technologies like AI, the findings contained within this research provide a comprehensive look at the realities agents face, as well as the opportunities organizations have to better support them.

The results reveal a workforce that is highly engaged, aligned to customer-first values, and motivated to succeed. At the same time, they point to a more complex operational environment where systems, processes, and structural gaps can create friction that limits performance and impacts both employee and customer outcomes.

This report is not just about agent sentiment. It is about the conditions that shape it. By understanding where agents feel empowered, where they face challenges, and what they believe would make the greatest impact, CX leaders can better align investments, strategies, and operating models to unlock stronger performance across the entire customer experience ecosystem.

Research Highlights:

Agents Are Engaged, Aligned, and Invested in the Customer Experience

- 82% of agents report being satisfied in their role (48% Very Satisfied) (page 13)
- 88% indicate they are passionate about the work they do (52% Very Passionate) (page 17)
- 87% say they have a good understanding of the strategies, goals, and priorities of their program (page 23)
- 89% believe their organization is committed to putting the customer first (page 26)

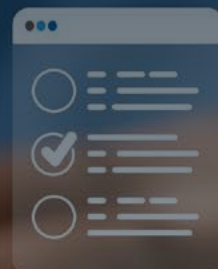
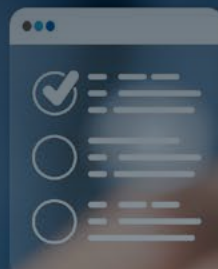
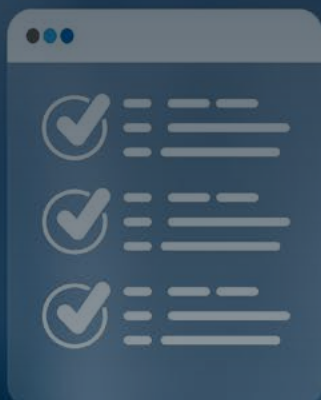
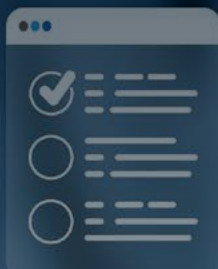
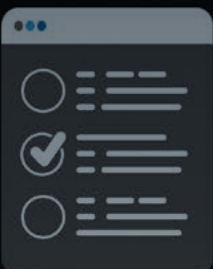
Technology Remains the Primary Barrier to Performance

- 78% of agents are satisfied with the technology they use (40% Very Satisfied) (page 20)
- Just 50% say their systems are well integrated (page 21)
- 76% say their tools are very effective in helping them do their job (41% Very Effective) (page 19)
- When asked where improvement is most needed, technology ranked #1 (24%) (page 24)

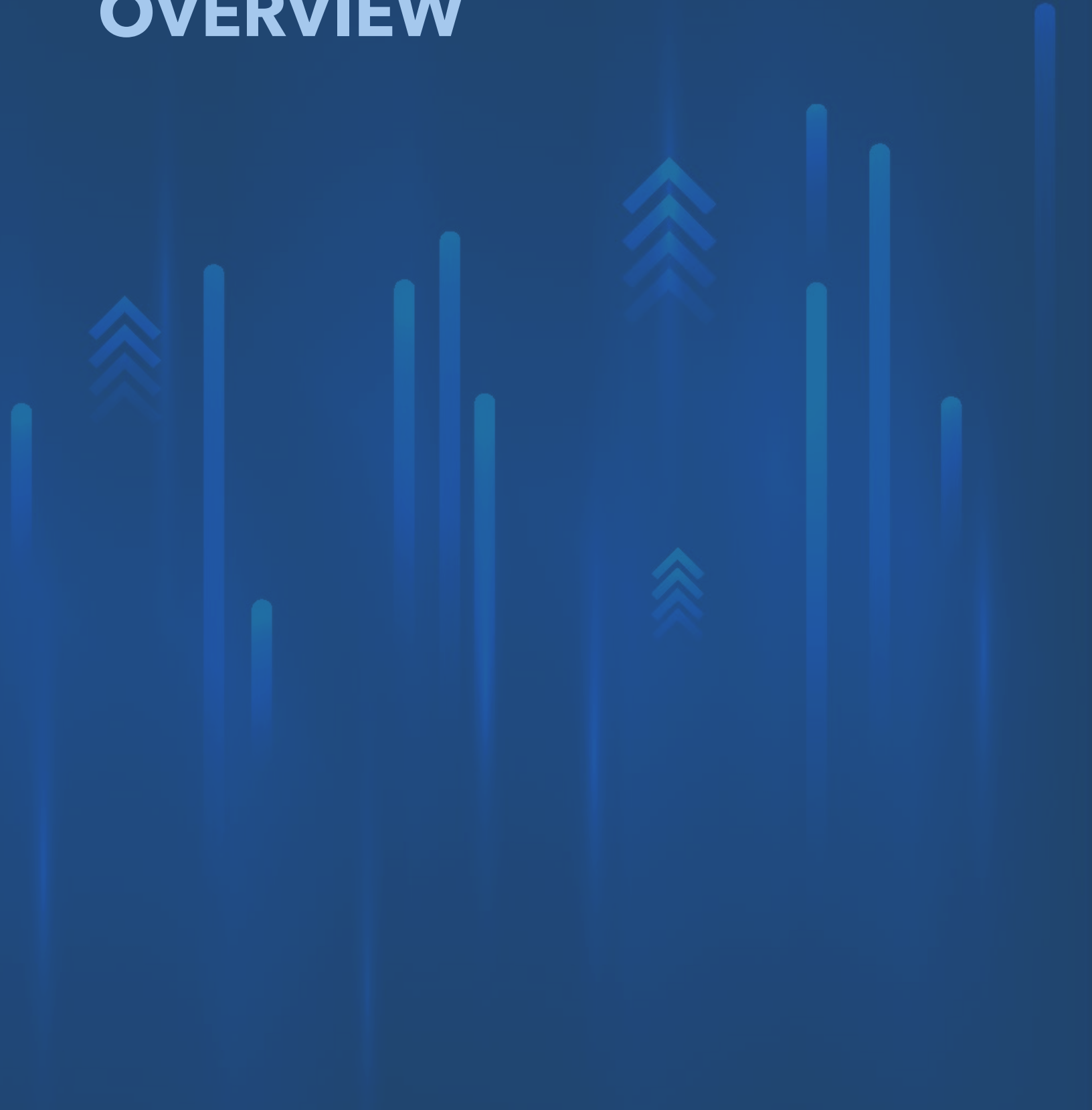
Leadership Practices Are Mixed

- 62% believe their performance is being fairly and accurately measured (page 15)
- 54% feel adequately recognized for their work (page 17)
- 59% say there are effective channels for providing feedback (page 16)
- 84% report clear alignment between their goals and organizational priorities (52% Very Aligned) (page 23)

SURVEY RESULTS



SURVEY PARTICIPANT OVERVIEW

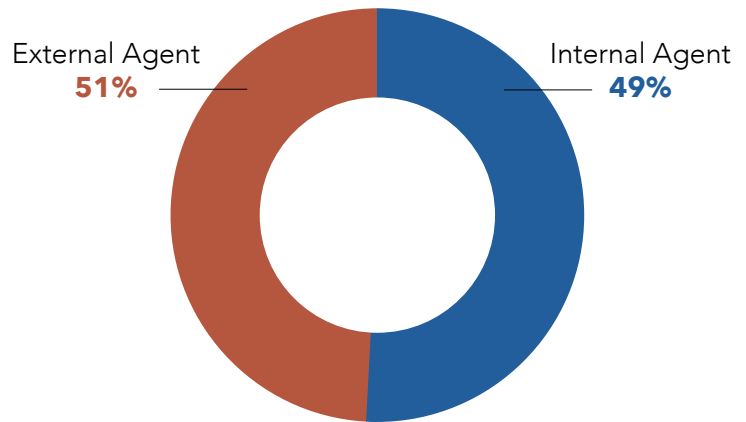


SOURCE AND WORK ENVIRONMENT

Survey Participant Overview

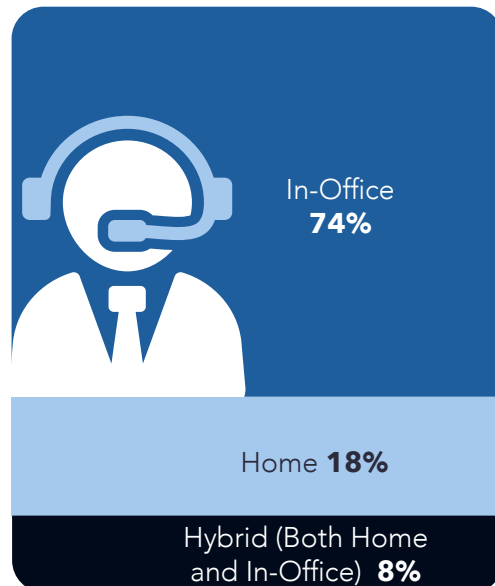
Among agents participating in the survey, half (49%) were internal agents, while the other half (51%) were external, third-party agents. Whether agents are Internal or External can play a significant role in things like empowerment, engagement, and brand expertise. Such differences will be highlighted throughout this report when and where appropriate.

Are you an internal agent (employed directly for a brand) or are you employed by a BPO/third-party agent?



Collectively, nearly three-fourths of all agents indicated they were strictly working In-Office, with fewer than one in five agents indicating they were working from Home. At the same time, Internal agents were nearly twice as likely to work from Home as External agents (22% compared to 13%), while External agents were twice as likely to work in a Hybrid environment as Internal agents (12% compared to 6%).

Do you work from home, in-office, or hybrid (both home and in-office)?



AGE AND EXPERIENCE

Survey Participant Overview

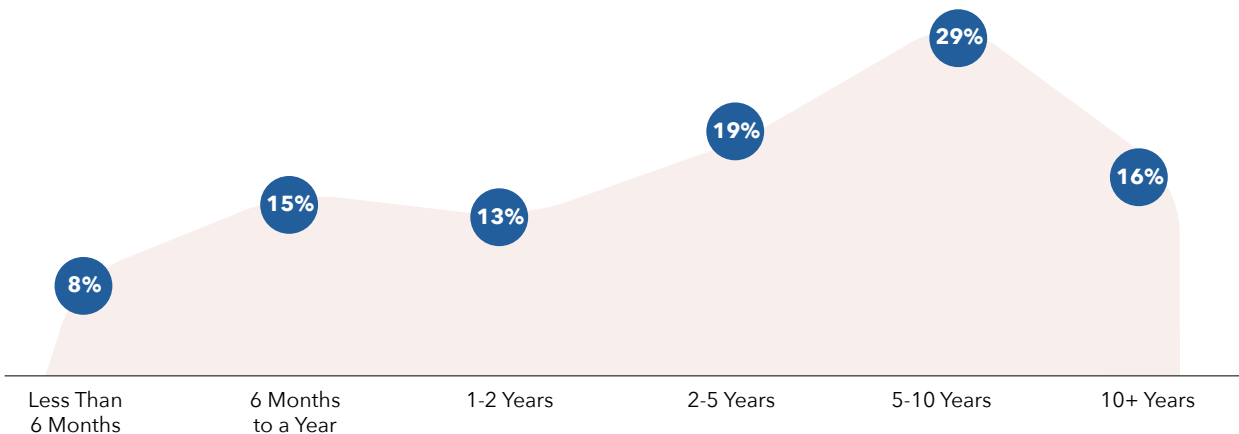
Agents who participated in surveying skewed younger (accurately reflecting the wider front line workforce), with more than half (52%) of participating agents indicating they were ages 30 years or younger. Age was also strongly correlated with work environment, with only 9% of those ages 18 to 30 working from home compared to 27% of those ages 31 and older. Agent age is a factor when considering the introduction of new technology into the contact center, with younger agents being more adaptable to technology changes, whereas older agents may need additional coaching and training.

Which describes your age group?



The front line agents who participated in the surveying are a surprisingly experienced cohort, with 45% of respondents having five or more years of experience in their role. And although many agents have built long-term careers in customer care, only 47% say "Yes" when asked if career paths and opportunities for advancement are clearly defined (page 11), highlighting a disconnect between tenure and progression. Furthermore, none of the results in this research can be dismissed due to agent inexperience.

How much experience do you have in a care agent/representative role?



HIRING AND CAREER PATHING

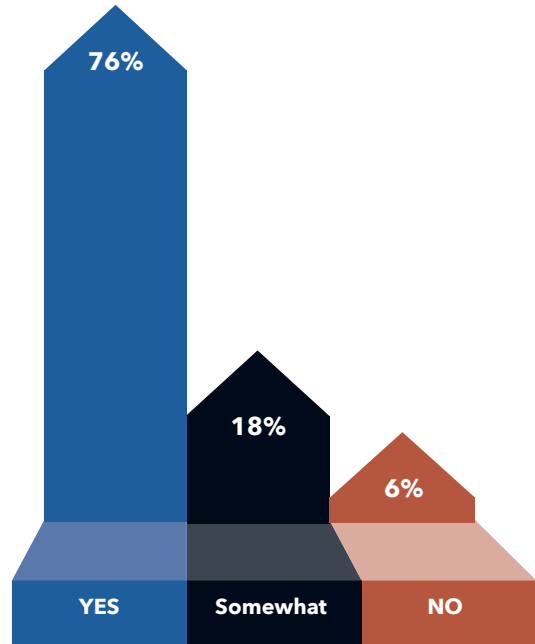


ROLE REPRESENTATION AND TRAINING EFFECTIVENESS

Hiring and Career Pathing

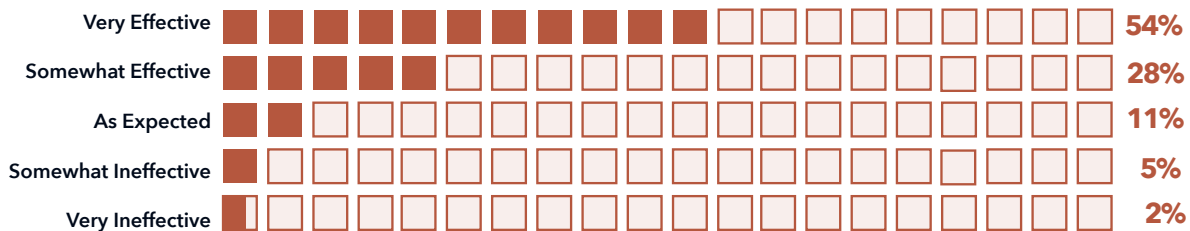
Do you feel the role you are fulfilling was accurately described to you as a part of the recruitment process?

While 76% of agents report that their role was accurately represented during recruitment, nearly one in four experienced some level of mismatch, highlighting a meaningful gap between expectations and day-to-day reality. This can truly influence early engagement, ramp-up, and long-term retention. Also worth noting was the fact that there was very little difference in how Internal and External agents responded to this survey question.



Though most agents (82%) view training as effective, with 54% indicating "Very Effective," onboarding challenges do exist (page 10), and may reveal a critical gap between training and real-world readiness, whereas agents might be well-prepared conceptually but might not be fully equipped to navigate the realities of their day-to-day roles. This is where simulation training can play a critical role.

How effective do you feel your company's initial training was in preparing you for your current role?



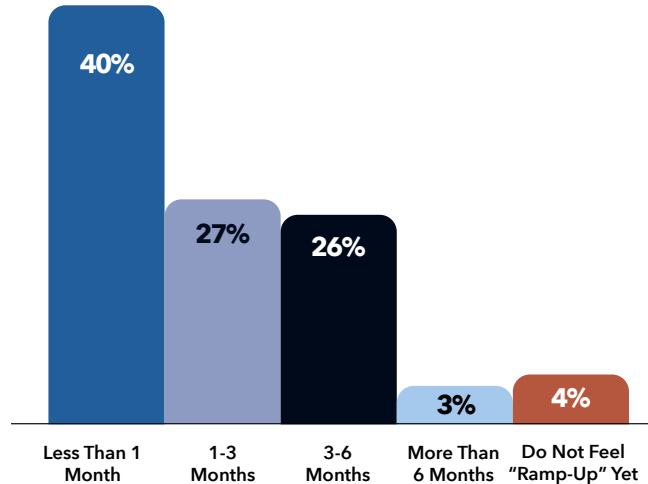
In combination, these findings suggest that organizations are largely successful in setting expectations and delivering foundational training, with 76% of agents reporting accurate role representation and a majority viewing training as either "Very Effective" or "Somewhat Effective." However, gaps remain between preparation and real-world execution. There is a notable mismatch in expectations, and onboarding challenges tied to systems and product complexity persist (page 10). Together, these insights point to a broader opportunity, one focus not just on refining hiring and training processes, but also on connecting expectations and training with a real-world contact center experience.

RAMP-UP DURATION AND CHALLENGES

Hiring and Career Pathing

Across all agents, 67% indicated they felt fully ramped up in three months or less. Whether an agent was Internal or External appeared to influence results, with 74% of Internal agents indicating full ramp-up occurring within three months or less compared to only 58% of External agents. Age also correlated with reduced ramp-up timing, with 50% of those ages 18-30 being ready within one month compared to only 29% of those 31 years and older.

How long did it take you to feel fully "ramped up" after starting your role?



Challenges during the ramp-up period centered on product complexity (28%), systems/tools (27%), and confidence (25%). These challenges point to executional complexity as a core issue. The challenges with technology especially align with broader findings throughout this report, including the fact that only 22% of respondents are either neutral or dissatisfied with the tools and technology at their disposal (page 20), 50% report tools either don't or only sometimes integrate well (page 21), and 10% say tools they use to help customers are "Somewhat Ineffective" (page 19). Despite positive opinions on training and fast ramp-up times, technology challenges highlight a potential gap between preparation and real-world readiness driven by system complexity.

What was most challenging during your ramp-up period?

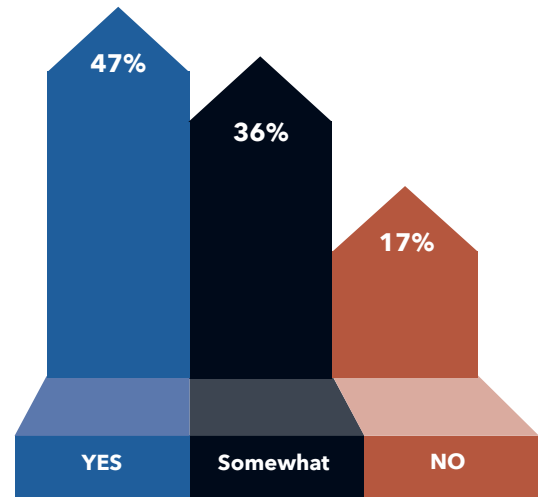


CAREER PATHING AND OUTLOOK

Hiring and Career Pathing

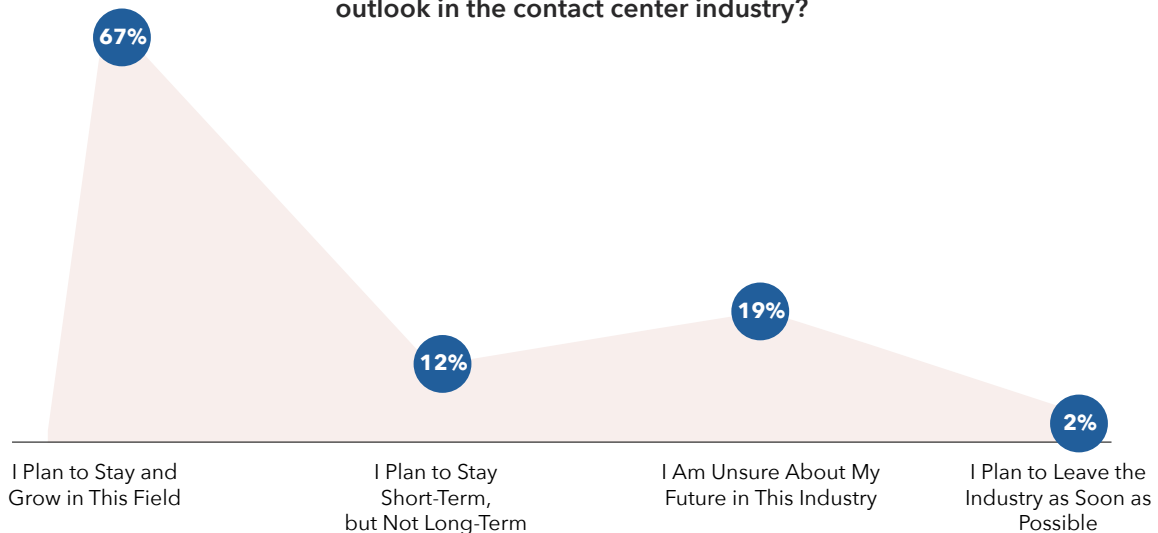
Do you feel your organization provides clear career pathing and advancement opportunities?

Interestingly, only 47% of respondents felt their organization provided clear career pathing and advancement opportunities, with another 36% of respondents indicating "Somewhat," though 67% indicated they plan to stay and grow within the field (below). At the same time, whether an agent was External or External played a role in exactly how agents perceived opportunities for advancement, with 24% of Internal agents responding "No," while only 10% of External agents responded the same.



The career outlook results shows strong intent to stay, with 67% planning to stay and grow in the field. This result was especially strong among those ages 46 to 60, with 92% of respondents intending to stay and grow. That said, a total response of 31% having either a short-term or uncertain outlook signals risk. When paired with the result of only 47% respondents feeling their organization provides clear career paths, there is a clear gap between ambition and direction. One approach to resolving this gap might be to turn intent into retention by better defining transparent career paths, investing in skill development, and creating visible progression opportunities. Without clear growth and opportunity, even a motivated, experienced workforce may eventually depart.

Which of the following best describes your career outlook in the contact center industry?



EMPLOYEE SATISFACTION, ENGAGEMENT, AND PERFORMANCE

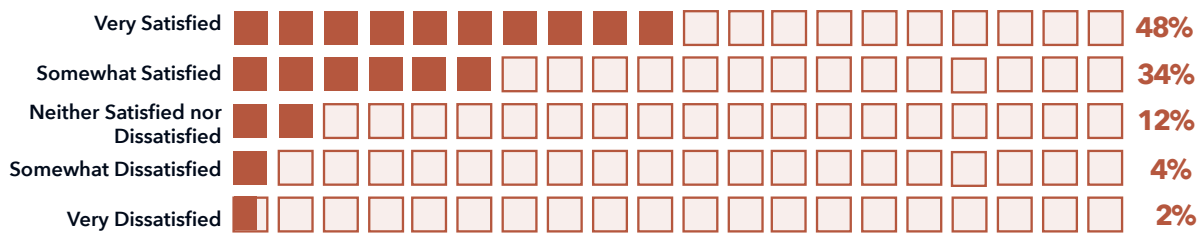


EMPLOYEE SATISFACTION AND WORK/LIFE BALANCE

Employee Satisfaction, Engagement, and Performance

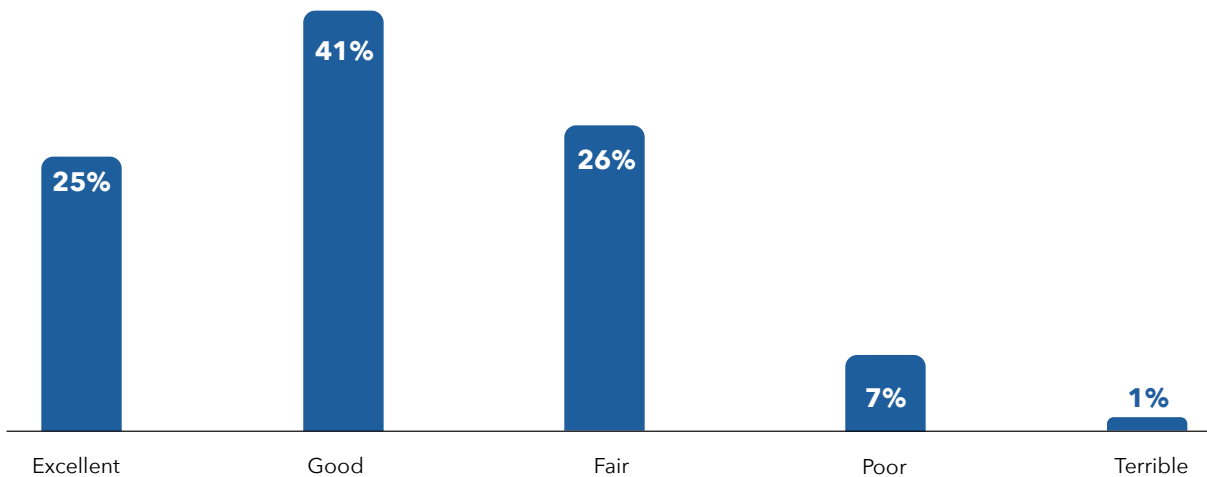
Employee Satisfaction (ESAT) results show a strong foundation for contact center operations, with 82% of agents satisfied, though only half (48%) claim the highest level of satisfaction, providing an opportunity to elevate the employee experience. In the context of technology and process friction seen elsewhere (page 24), it may be the case that satisfaction is capped by operational barriers. Brands should protect this positive baseline by removing friction, prioritizing better tools, streamlining workflows, and ramping up Voice of the Employee (VoE) initiatives. Turning “Somewhat Satisfied” into “Very Satisfied” is where meaningful gains in performance and retention will come. Incidentally, there was no meaningful difference in ESAT levels between internal and external agents, though ESAT was correlated to age with 59% of those ages 18-30 “Very Satisfied” compared to only 35% of those ages 31 and older.

Overall, how satisfied are you with your current role as a contact center agent?



While work-life balance results are largely positive (with 66% of those surveyed rating it “Excellent” or “Good”), 34% reporting fair to terrible signals some meaningful strain. In the context of a strong ESAT (above) and high levels of agent passion (page 17), a stronger work/life balance may be the key to helping sustain engagement despite operational friction. A few ways to improve this balance are added flexibility, optimized scheduling for individuals, appropriate staffing levels, and even workload distribution. As expectations rise, maintaining a strong work-life balance for agents will be critical to retaining experienced, motivated, and career-minded talent, while also helping to prevent burnout.

How would you rate your current work/life balance?



IMPROVING WORK/LIFE BALANCE

Employee Satisfaction, Engagement, and Performance

Responses to improving work/life balance cluster around three primary themes: compensation, flexibility (including more time off), and basic operational support resources (like better tools). Many agents point to pay as a foundational issue, noting that financial strain undermines an agent's work/life balance regardless of flexible scheduling or fringe benefits. Flexibility (particularly hybrid, flextime, or remote work), consistent scheduling, and breezier PTO policies also emerged as a major lever, reflecting a desire for greater control over one's time. Finally, agents highlight practical supports such as mental health resources, transportation, better tools, and more manageable workloads. While a portion of respondents report satisfaction, the volume and consistency of these themes suggest that an agent's work/life balance is being maintained despite structural friction and conditions that are not yet fully optimized. Overall, improving the work/life balance of agents will require addressing both financial stability and operational flexibility rather than relying on culture or perks alone.

BELOW ARE A HANDFUL OF REPRESENTATIVE VERBATIM TO THE QUESTION, WHAT COULD YOUR EMPLOYER DO TO IMPROVE YOUR WORK/LIFE BALANCE?



"Maintaining our consistent schedule is helpful for stability. To further support this, I recommend continuing to prioritize efficient workflows and ensuring the team has the necessary resources to meet all daily deliverables within those core hours."

"My work/life balance is good. Mental health resources and available sick days could improve it."

"Overall, I feel supported. Continuing the current flexibility and trust-based approach would be great."

"Provide us with onsite sleeping quarters and a food pantry."

"Increased pay due to how bad inflation has become."

"Better systems and tools."

"My employer does well with work life balance by implementing activities at work to help balance things further. I just wish we were off on certain holidays entirely like Thanksgiving and Christmas."

"Offering mental health resources, fitness stipends, or mindfulness workshops shows commitment to holistic well-being."

"Offering flexible work arrangements like flextime and remote options, setting clear expectations, and encouraging employees to take breaks and use their paid time off."



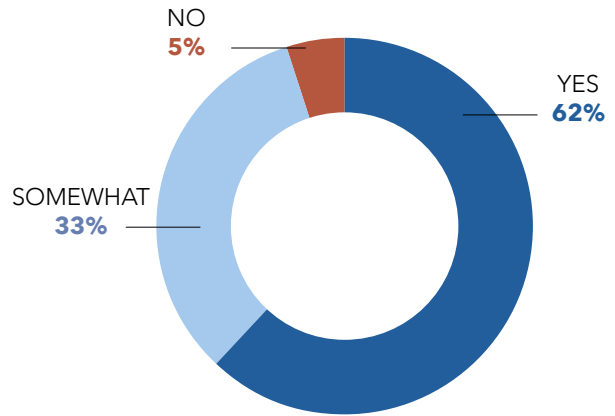
These and the other responses received reinforce broader themes across this body of research with an emphasis on tools and systems, fair workload, and adequate compensation. Echoing agent opinions on technology (page 20) and tool integration (page 19), the above responses suggest operational friction contributes directly to work/life balance challenges. Additionally, strong calls for greater flexibility and improved career support connect to gaps in career pathing (page 11) and engagement drivers identified elsewhere. Notably, the frequent mention of pay adds an important layer not fully captured in other metrics, indicating that even with relatively strong satisfaction and engagement scores, financial pressure remains a key underlying factor influencing the overall agent experience.

PERFORMANCE MEASUREMENT

Employee Satisfaction, Engagement, and Performance

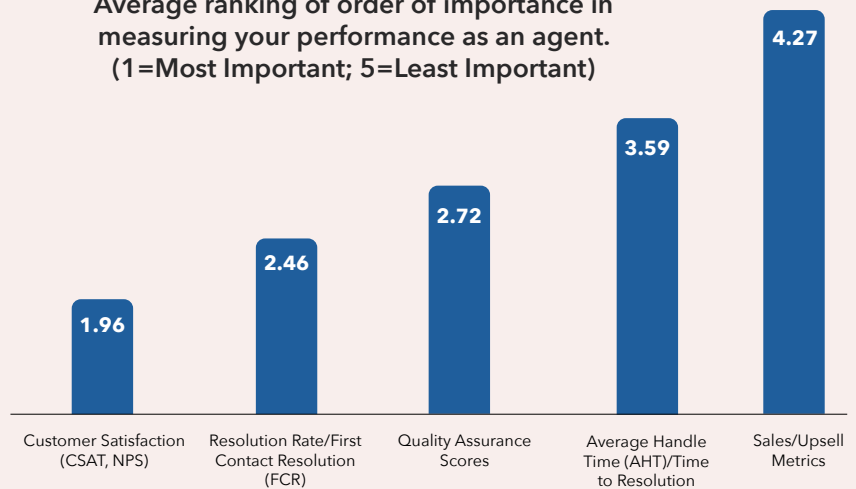
When asked about fair and accurate performance measurement, 62% of agents say performance is fairly measured, though 33% indicate "Somewhat," signaling significant room for improvement. This suggests metrics may not fully reflect real-world conditions, especially given known challenges with tools and processes. To improve transparency and context in measurement, program leaders should consider aligning KPIs with factors agents can control, accounting for system limitations and clearly connecting performance to rewards. Even small gains in perceived fairness can significantly boost trust, motivation, and retention.

Do you feel your performance is being fairly and accurately measured?



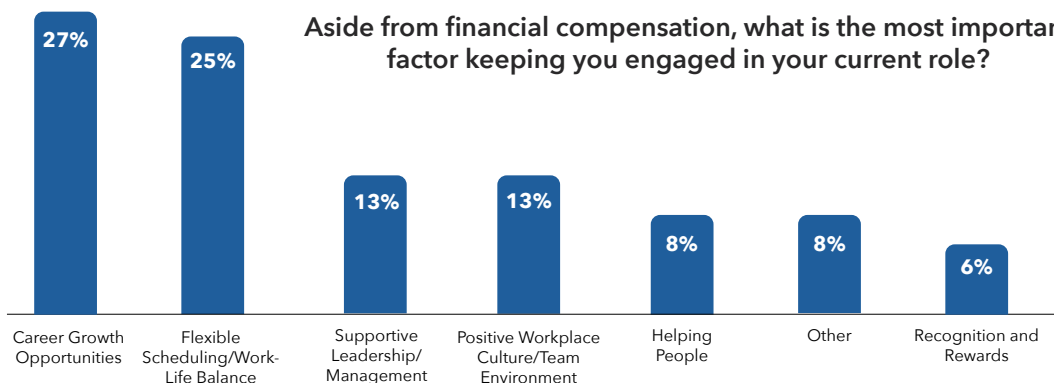
The results below show agents prioritize customer-focused outcomes (CSAT [1.96], FCR [2.46], and QA [2.72]) well above efficiency metrics (AHT [3.59] and sales [4.27]). This signals strong alignment with customer-first values. Those who manage agent performance should consider leaning into this alignment, prioritizing and rewarding quality and resolution over speed alone, working to ensure performance frameworks reflect what agents believe matters most. Balancing efficiency with experience will drive better outcomes and reinforce engagement.

Average ranking of order of importance in measuring your performance as an agent. (1=Most Important; 5=Least Important)



The below results show engagement is primarily driven by career growth opportunities (27%) and scheduling flexibility/work-life balance (25%), far outweighing helping people (8%) and recognition and rewards (6%). This aligns with broader findings, whereas 67% plan to stay and grow in the industry (page 11), yet only 47% see clear career paths (page 11). And while 66% of survey respondents are positive about work/life balance (page 13), a meaningful portion still struggle to find satisfactory work/life balance. Prioritizing clear career progression and flexible work models are likely core drivers of engagement, far more than increased incentives alone. Aligning on all drivers is a surefire way to strengthen retention, improve ESAT, and promote long-term performance.

Aside from financial compensation, what is the most important factor keeping you engaged in your current role?

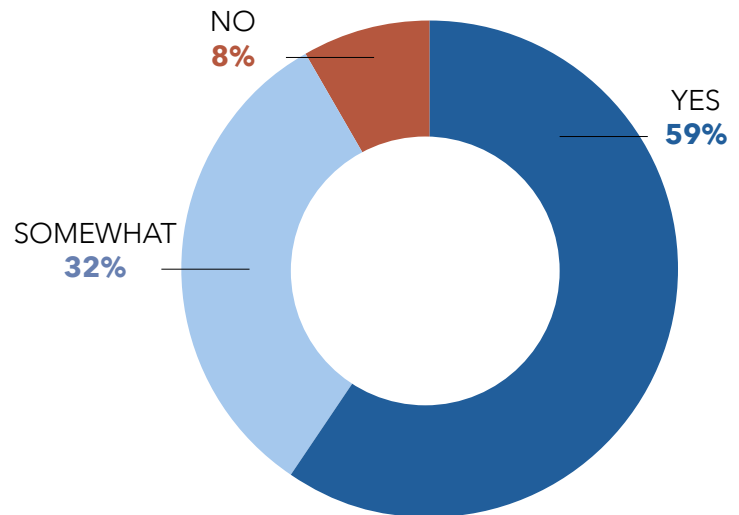


EMPLOYEE ENGAGEMENT AND FEEDBACK CHANNELS

Employee Satisfaction, Engagement, and Performance

Fifty-nine percent of respondents indicated feedback routes are effective, though only 32% “Somewhat” agree, suggesting inconsistency in how feedback is acted upon. This aligns with broader findings where leadership and alignment are strong, yet operational gaps (tools and processes) persist, implying feedback may not always translate into visible change. Closing this loop might look like making feedback-based actions more visible, act more quickly on common themes, and communicating what’s changing to front line staff. Strengthening the connection between input and action will build trust, engagement, and lead to an expectation of continuous improvement. Interestingly, a higher percentage of external agents (65%) felt they had an effective means of providing feedback compared to internal agents (54%).

Do you feel like you and your peers have an effective route for providing feedback about what’s working and what could work better, and having that feedback become action?



What does the agent feedback loop look like at your organization and how do agent insights turn into actions?

“

Speaking with our call center representatives face-to-face in office helps gain perspective. For example, when I review customer feedback about our invoice being difficult to understand, I gain limited useful information to act on. However, upon conversing with staff I gain details and suggested improvements. By keeping an open channel of dialogue with our call center representatives, I’m able to tie customer feedback to meaningful business solutions.

The statistic shows less than 2/3 of employees feel their organization has an effective employee feedback channel. That resonates with me. Even though our CX team is listening, our end users don’t necessarily feel that engagement. We have taken a proactive step to more explicitly state our interest in front-line feedback. Within our CRM we have created a Voice of the Customer flag, encouraging representatives to use when they wish to raise a point to management. This tool has been effective in empowering staff to raise awareness immediately, without necessarily having to wait for their 1 on 1 with their manager, or a random conversation with a CX member. Instead, they can notate their own thoughts/concerns related to any case in the moment, and flag for management attention. On the reporting end, this feedback is helpful as a new avenue to explore during our monthly CX departmental readouts. By showcasing how each employee can have a voice and how their voices are heard through meetings with management, employees feel more empowered to make a real difference. Additionally, this helps with de-escalation as customers have a new avenue to pursue if they want their voices heard beyond their immediate resource.

”

Zeke Miller

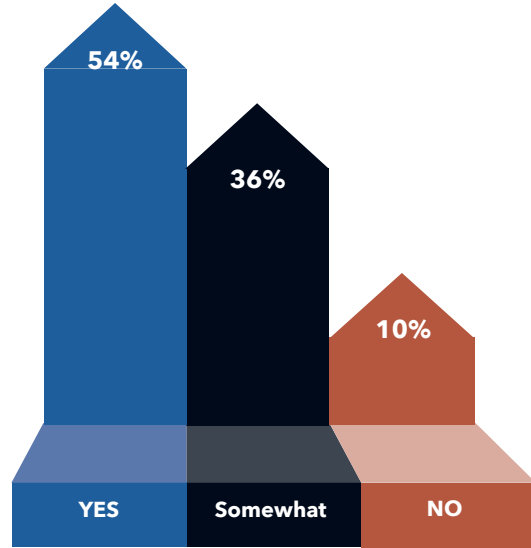


SUCCESS RECOGNITION AND AGENT PASSION

Employee Satisfaction, Engagement, and Performance

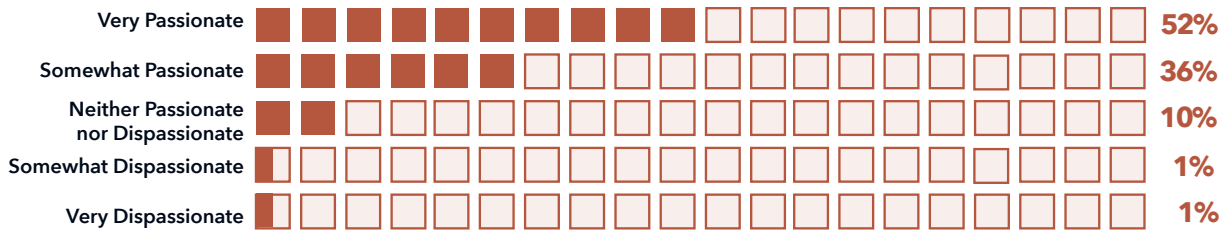
Although 54% of survey respondents feel they are adequately recognized for their contributions, only 36% “Somewhat” agree and 10% outright do not. This indicates that recognition is present, but not as consistently as agents might wish. This aligns with engagement findings where recognition (6%) ranks low compared to growth and balance (page 15), suggesting current efforts may lack significant impact. CX leaders should consider making recognition more specific, timely, and tied to meaningful outcomes like customer impact and growth. Elevating recognition will likely strengthen motivation and reinforce desired behaviors. Regarding recognition, there was no measurable difference between internal and external agents.

Do you feel you are adequately and appropriately recognized for your contributions to customer experience success?



A highly passionate survey cohort, 88% of agent respondents reported they are “Very Passionate” (52%) or “Somewhat Passionate” (36%) about the brand(s) they represent. This aligns with strong ESAT and a customer-first sentiment, reinforcing that motivation is not the issue. However, when paired with challenges around tools, career pathing, and processes (page 24), it highlights a gap between agent intent and organizational enablement. Protecting, cultivating, and harnessing this passion will be key for CX leaders to ensure motivated agents perform at their best. Passion is a powerful asset, but without proper support, encouragement, and recognition, it can erode over time.

How would you best describe the passion you have for the brand(s) you represent?



TOOLS AND TECHNOLOGY

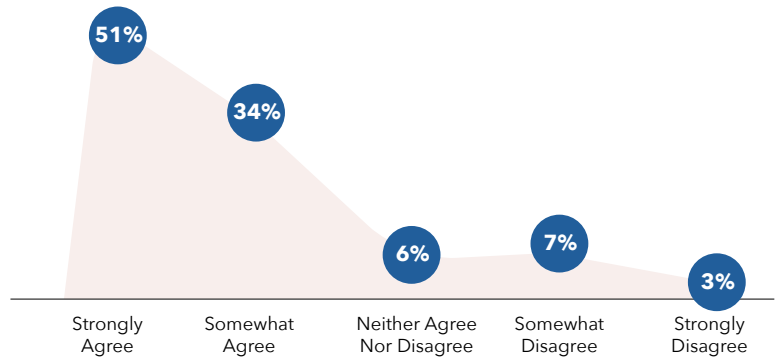


TOOL RESOURCES AND TOOL EFFECTIVENESS

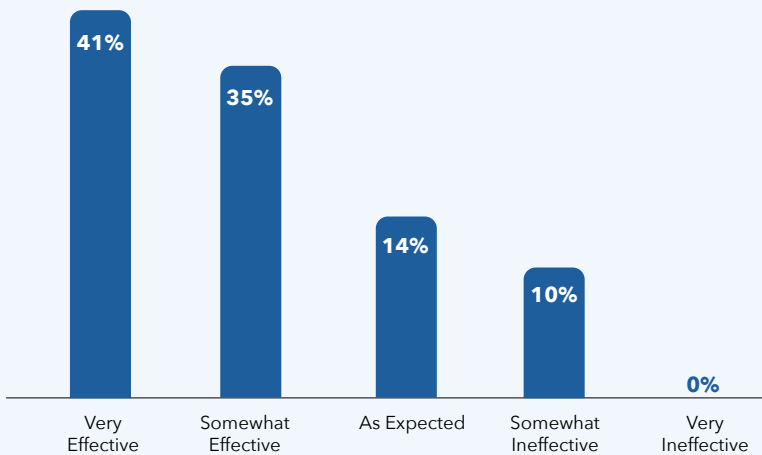
Tools and Technology

The results show a generally positive view among agents toward the tools, knowledge and resources needed to help customers, with 85% agreeing they have the tools and support needed. This aligns with broader findings around moderate tech satisfaction (page 20) and integration gaps (page 21), indicating tools exist, but may not be fully optimized. Focusing on quality, not just availability of tools and resources, may have an impact. By improving system speed, integration, usability, and effectiveness, CX leaders can drive better overall CX outcomes.

How strongly do you agree or disagree with the following: I have all the tools, knowledge, resources, and support I need to advocate for and effectively resolve the issues of my customers.



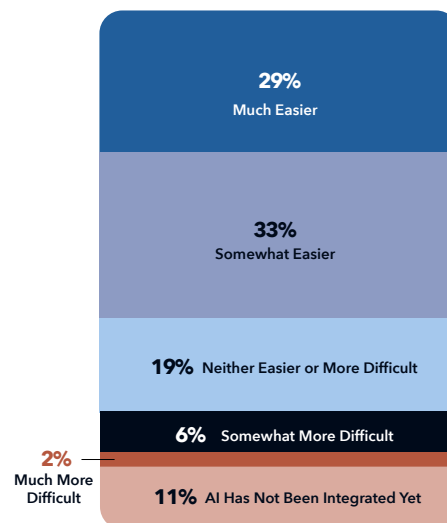
How effective are the tools and systems you use in helping you resolve customer issues?



Forty-one percent of agents find tools “Very Effective,” and another 35% indicate “Somewhat Effective.” This aligns with broader findings where just 51% strongly feel they have what they need (page 19), only 50% report effective system integration (page 21), and tools are a top improvement area (page 24). CX leaders should consider options to move beyond tool availability to true enablement, prioritizing integration, speed and usability, and reducing friction in workflows. Improving tool and system effectiveness is one of the most direct ways to boost agent performance, confidence, and overall customer experience outcomes.

With 62% of agents saying AI makes their job easier to one degree or another, and 27% indicating either neutral or more difficult (accepting 11% report no AI integration yet), results indicate inconsistent impact. This aligns with broader findings where core issues remain tied to tool effectiveness (41%) and system integration (50%) — suggesting AI is helping, but perhaps not yet transforming the experience. For AI to truly succeed in the near term, CX leaders should consider focusing on integrating AI into existing workflows, not layering it on top. Also, by prioritizing use cases that reduce friction (e.g., knowledge access, automation, etc.), CX leaders can ensure AI enhances (rather than complicates) the agent experience.

Has the integration of AI-powered solutions within the contact center made your job easier or more difficult?

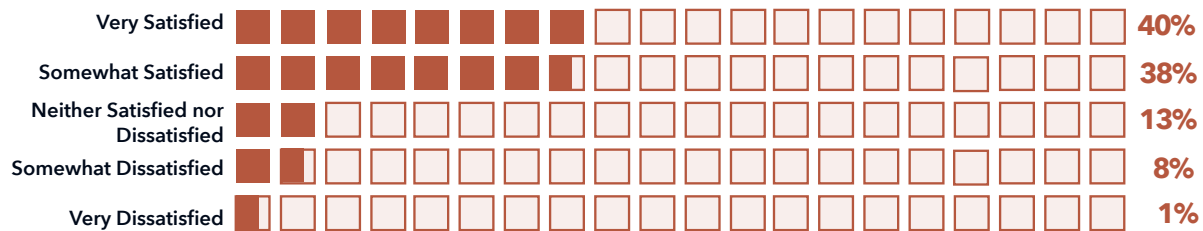


TECH SATISFACTION AND OPPORTUNITIES FOR IMPROVEMENT

Tools and Technology

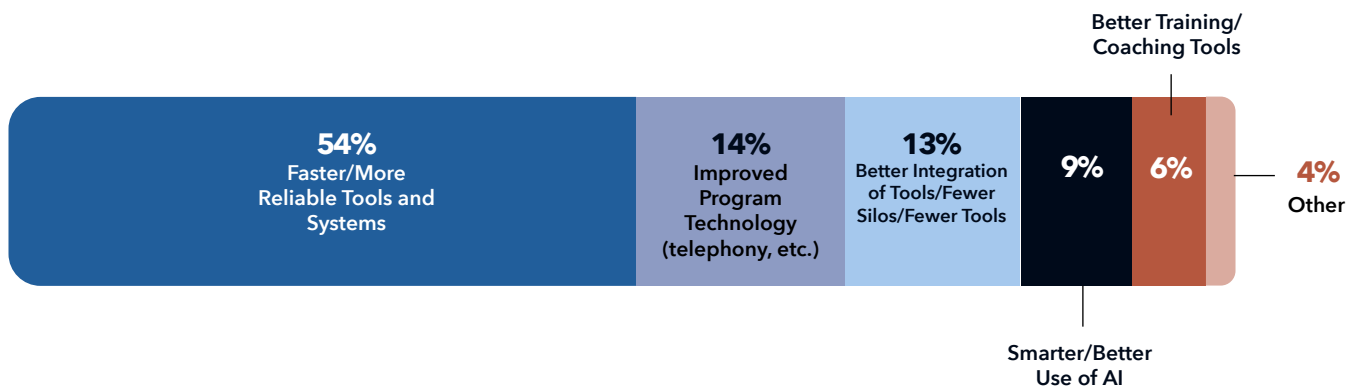
Asked about their satisfaction with role-related technology, 78% of agents were satisfied, yet only 40% responded, “Very Satisfied.” This reinforces the idea that the agent experience, purely from a technology standpoint, is good but not great. This aligns with similar findings, whereas 41% of agents say tools are “Very Effective,” (page 19) and 50% feel the tools and systems they use are well integrated and work seamlessly together. There was also a measurable technology satisfaction gap between internal and external agents, with 48% of internal agents indicating “Very Satisfied” versus only 31% of external agents. To re-engage agents on the technology front, CX leaders should consider focusing on elevating the experience, not just maintaining it. Improve system speed, integration, and usability to reduce friction. Most important, listen to what agents are saying about the tools and systems they use. Create avenues that make providing feedback both easy and rewarding, Moving agents from “Somewhat Satisfied” to “Very Satisfied” will unlock meaningful gains in efficiency, confidence, and CX quality. Better tools equal better results.

How satisfied are you with the technology you use to perform your role (e.g., CRM, knowledge base, call handling software)?



Regarding which technology improvement would make the biggest difference in their day-to-day work, the results were decisive, with 54% of agents identifying faster, more reliable tools and systems, far ahead of integration (13%) and AI (9%). This reinforces broader findings, whereas only 40% of agents are “Very Satisfied” with the technology at their disposal. Furthermore, only 41% of agents find their tools highly effective (page 19). Together, these results signal that technology performance — not innovation — is the core issue. CX leaders should consider prioritizing foundational fixes ahead of advancing new capabilities or adding additional layers of complexity. Improving system speed, reliability, and stability can have an immediate impact on improving agent efficiency while also creating an improved agent experience.

Which technology improvement would make the biggest difference in your day-to-day work?

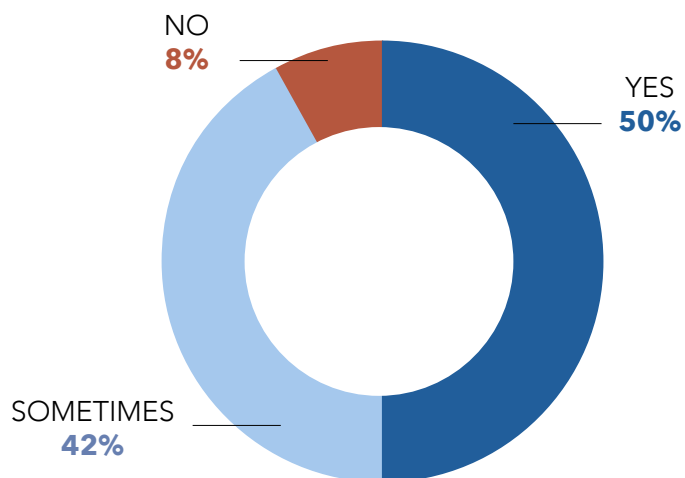


INTEGRATION AND AI IMPACT

Tools and Technology

Fifty percent of agents feel systems are well integrated and work seamlessly, with another 42% saying this occurs sometimes. This highlights some level of inconsistency in terms of tool and system integration. This points to fragmentation as a core issue. To help combat this, CX leaders should consider prioritizing integration, simplification, and addressing issues related to legacy and compatibility issues. Reducing tool sprawl, improving data flow between systems, and creating more seamless workflows can help reduce friction between systems, leading to improvements in efficiency, accuracy, and ultimately elevate the agent experience.

Do you feel your current set of tools and the systems you use integrate well and work seamlessly with each other?



“ Recent industry research indicates that most service agents find that AI has made their work easier. That pattern holds for agent-customer interaction tools, though the reasons are not always obvious.

AI lands well where service agent and customer interactions are patterned. Recurring questions, recurring messages, recurring shapes of interaction. Agents already bring real expertise to those moments. The tool’s job is often to close a small, well-shaped gap in work the agent is already navigating, not to do the work from scratch. That’s why bounded, predictable interactions are where productivity gains tend to show up most clearly, and where QA tends to register cleaner improvements in consistency and accuracy.

When patterns get more complex or operational moments narrow, agent-customer interaction tools take on a reduced, though still relevant, role. In more complex moments, the work requires judgment, interpretation, and sensitivity to a customer’s specific situation, and that remains largely human work. In narrower moments, when operational pressures rise, agent task sets often narrow with them. During peak windows, most interactions are short and operational, often after more subtle questions have already been addressed. AI’s smaller role in these scenarios reflects the demands of the work, not a limitation of the tool itself.

Outside those patterns, the reassurance an AI tool offers is a kind of value productivity dashboards don’t always capture. Agents tend to feel more equipped to handle moments that previously depended on improvisation, even in cases where they don’t end up using the tool. Knowing the tool is available shapes how agents approach the interaction. In much the same way that a visible service agent reassures customers in a default self-service context, even when the customer doesn’t want or need help, an AI tool can reassure an agent even when they don’t reach for it.

Treating AI primarily as a productivity lever can miss the more specific kind of value it offers in agent work, especially in customer interactions. When AI fits the contours of those interactions, it supports the work directly. When it doesn’t, it still adds value by eliminating some uncertainty for the agent.



Michael Crema
Senior CX Researcher



PROGRAM AND OPERATIONAL STRATEGY

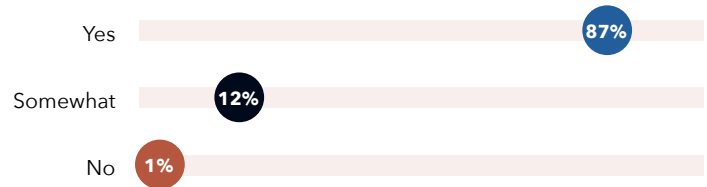


UNDERSTANDING OF GOALS AND FRONT LINE ALIGNMENT

Program and Operational Strategy

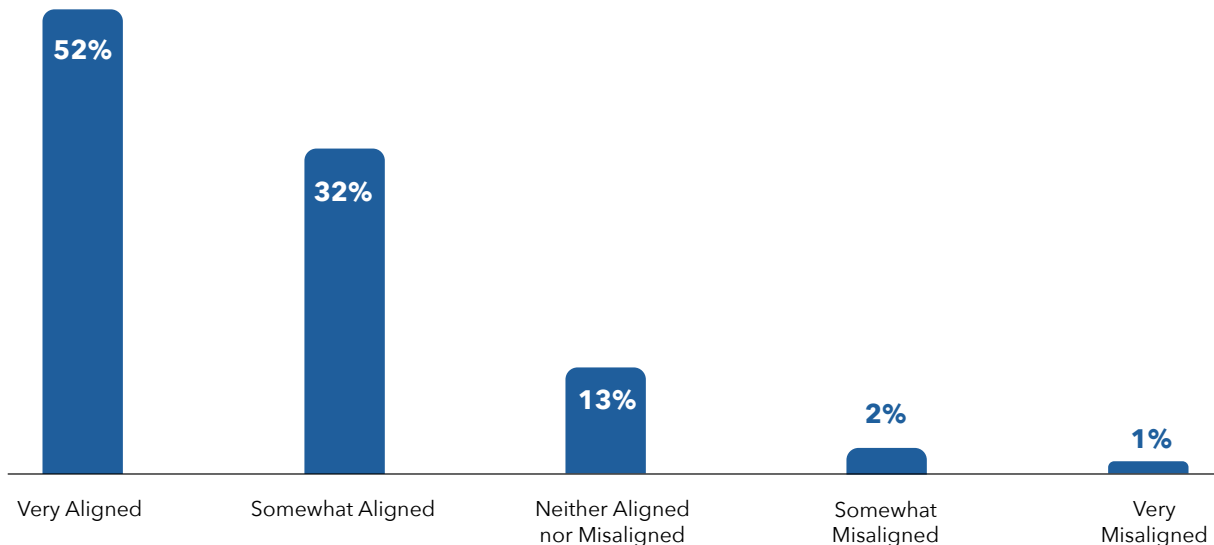
With 87% of agents indicating they have a good understanding of CX strategies, goals, and priorities, results suggest strong alignment and communication between agents and leadership. This reinforces other positive findings around goal alignment (below) and brand passion (page 17), confirming agents are clear on what matters most. However, when paired with gaps in tools and systems, integration, and career pathing, it highlights a disconnect between strategic alignment and day-to-day enablement. CX leaders should consider ways to build on agent clarity and enthusiasm, foster further strategic alignment, remove points of friction, and enable agents through better performing systems and tools.

Do you feel you have a good understanding of the strategies, goals, and priorities of the customer care operations of your organization?



Given that 84% of agents indicated some level of alignment between their goals and overall CX program objectives, it's fair to say there is cohesion between front line execution and organizational priorities. This reinforces other positive findings around the understanding of CX strategies (page 23) and brand passion (page 17), confirming agents are clear on what success looks like.

How well do you feel your goals as an agent align with the goals of the overall CX program?

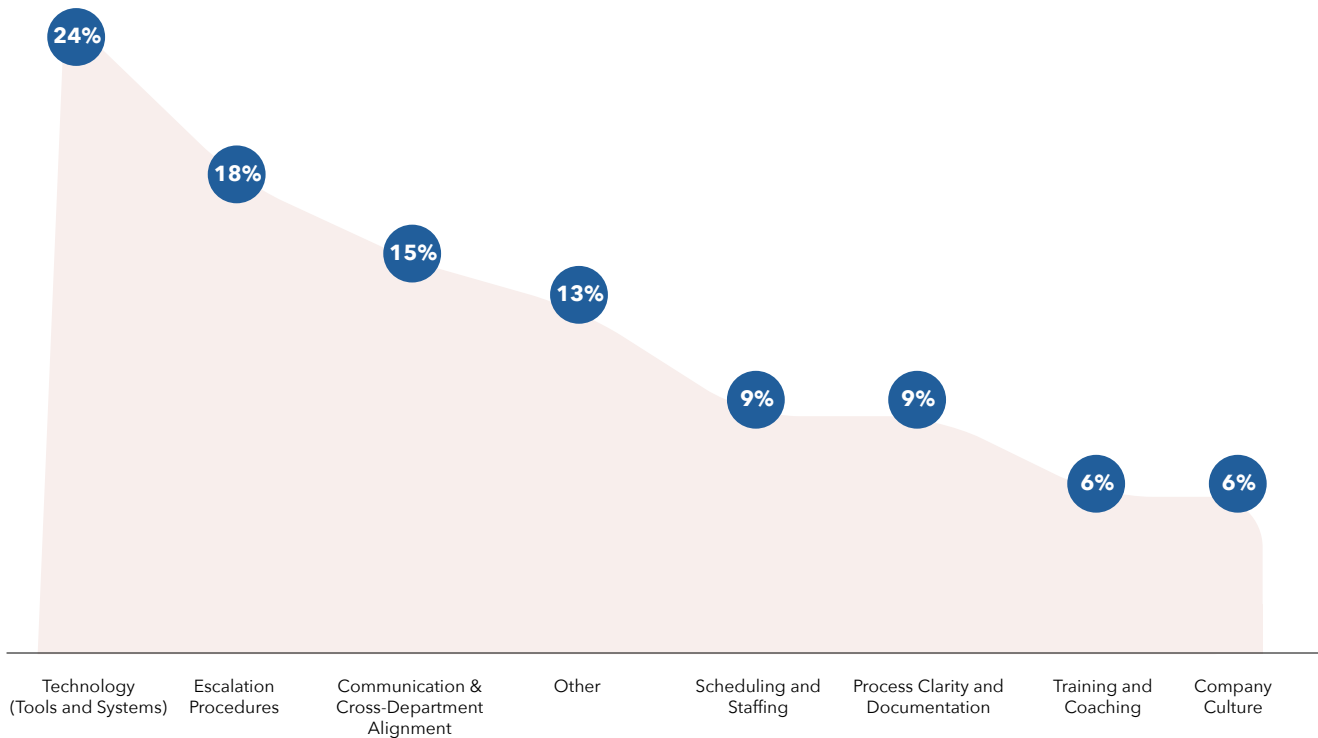


AREA MOST IN NEED OF IMPROVEMENT

Program and Operational Strategy

Technology ranked as the top area in need of improvement (24%), followed by Escalation Procedures (18%) and Communication and Cross-Department Alignment (15%), pointing to operational efficiency (as opposed to people) as the primary constraint on performance. This aligns with earlier findings around tool effectiveness (page 19) and system satisfaction (page 20), reinforcing that agents are often working within environments that make execution more difficult than it needs to be. At the same time, the spread across multiple categories suggests challenges are interconnected, not isolated. CX leaders should take a holistic approach, prioritizing technology improvements while also strengthening processes, communication, and escalation paths to create a more seamless and efficient operating environment for agents.

In your experience, which area is most in need of improvement in your center's operations?



THE BIGGEST OPPORTUNITIES FOR IMPROVING CX

Program and Operational Strategy

Across responses received to the below question, the most prominent opportunity for improvement centered on technology performance and system integration (no surprises here), with agents consistently citing slow, unreliable, or disconnected tools as barriers to efficiency. This reinforces earlier findings where technology ranked as the top area for improvement (page 24), and only a minority rated tools as “Highly Effective.” Beyond technology, communication and cross-functional alignment emerge as key themes, particularly delays in receiving information from other departments, and lack of transparency in processes. Agents also highlighted the need for better training, clearer information, and more flexibility in policies, all of which impact their ability to deliver timely, personalized service. Taken together, these responses suggest that improving CX is less about redefining strategy and more about enabling agents to execute more efficiently, consistently, and confidently within their current roles.

BELOW ARE A HANDFUL OF REPRESENTATIVE VERBATIM TO THE QUESTION, “WHAT, IN YOUR WORDS, ARE SOME OF THE BIGGEST OPPORTUNITIES FOR YOUR ORGANIZATION TO IMPROVE THE OVERALL CUSTOMER EXPERIENCE?”

“

“Improving communication and streamlining processes would help create a smoother, more consistent customer experience.”

“I would say I wish we had a better system of making sure the clients are taken care of; and I feel horrible getting calls from clients who say their legal team hasn’t called them back in months and the previous escalations are unresolved.”

“Improving our technology tools would streamline CRM, call monitoring, and analytics, allowing agents to focus less on technical issues and more on customers. This leads to faster resolutions, personalized service, and stronger customer trust.”

“Continuously training models to reduce miscommunications and ensure the information provided is highly reliable, especially in critical decision-making contexts.”

“I actually believe that all the processes are correct; however, some utilities like the main CRM have many errors that can sometimes affect the customer experience because some functions fail continuously without warning.”

“I feel that my organization prioritizes the customer experience; I would just appreciate faster communication when it comes to any changes or updates in the service we are offering.”

“Personalizing interactions through data and AI, creating a seamless omnichannel experience across all touch points, and empowering employees with training and resources to be more proactive and responsive.”

“Make agents happy (rewards and pay more) to make customers happy.”

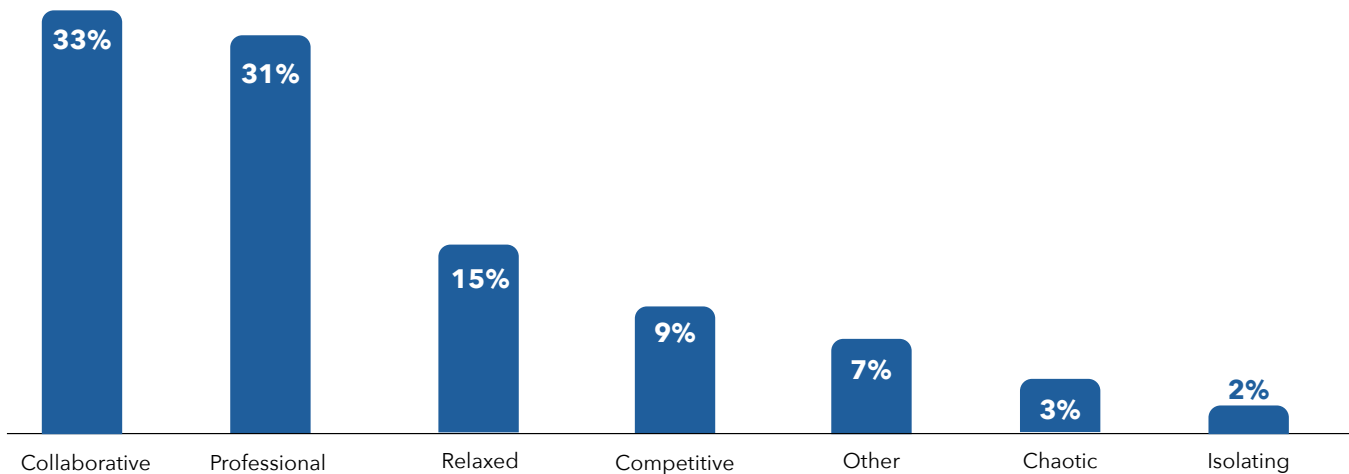
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CULTURAL VIEW AND "CUSTOMER FIRST"

Program and Operational Strategy

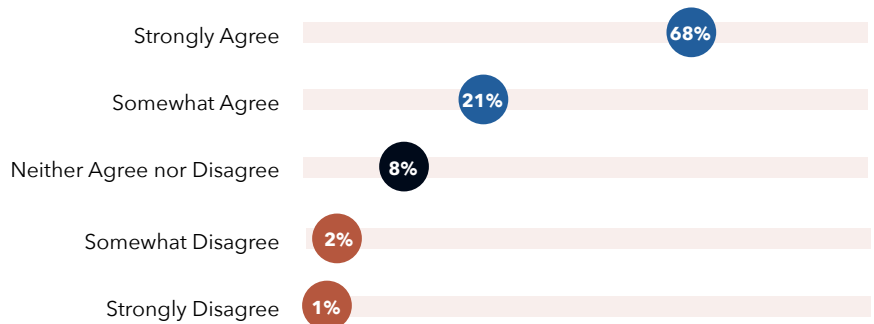
With Collaborative (33%) and Professional (31%) emerging as the most common descriptors, results suggest a generally positive and structured workplace culture. The presence of "Relaxed" (15%) further reinforces an environment that balances performance with approachability. However, smaller pockets describing culture as "Chaotic" (3%) or "Isolating" (2%) indicate that experiences are not entirely uniform. Although other negative sentiments were captured in "Other," including micromanaged, punitive, and stagnant, the general findings complement the strong engagement (page 23) and brand passion (page 17) findings, suggesting culture is a key contributor to overall sentiment. CX leaders should continue to foster collaboration and professionalism while addressing inconsistencies, ensuring all agents experience a supportive, connected environment regardless of team or location.

Which of the following cultural aspects best describes your current workplace?



A strong 89% of agents agree their organization is committed to a "customer-first" approach (including 68% who strongly agree), signaling a deeply embedded customer-centric culture within the industry. Such conviction is a powerful driver of exceptional care, and CX leaders should build on this by continuing to reinforce customer-first behaviors through recognition, storytelling, and leadership example, ensuring that this commitment remains visible, actionable, and consistently delivered across all interactions.

How strongly do you agree or disagree with the following:
The customer care operation I work in is committed to a "customer first" approach.

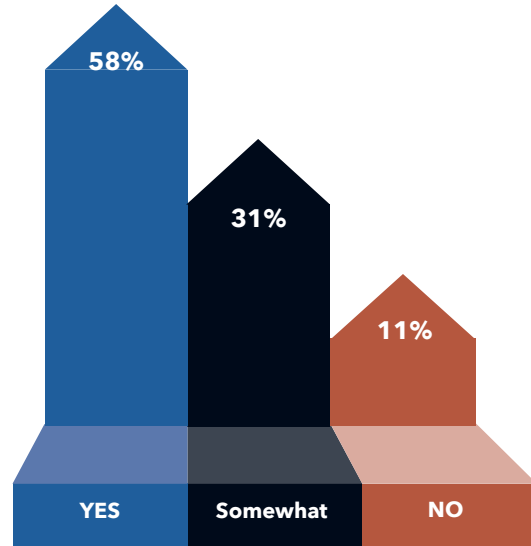


PERFORMANCE VISIBILITY AND OPERATIONAL EFFECTIVENESS

Program and Operational Strategy

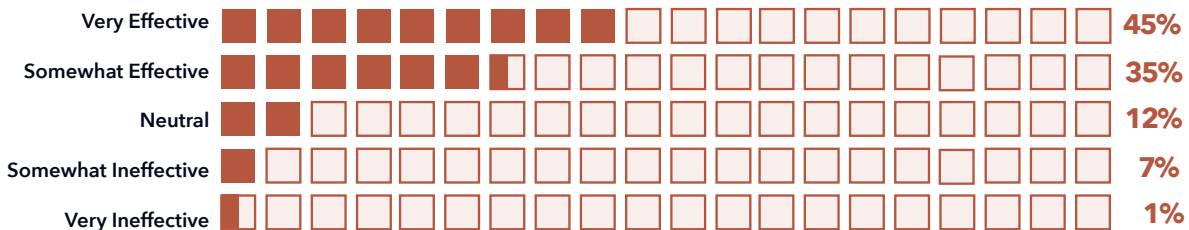
Most agents (58%) report having clear visibility into the processes and metrics used to measure their performance, with another 31% indicating partial visibility. This suggests a generally transparent performance environment, reinforcing strong alignment (page 23) and understanding of CX priorities (page 23). However, the sizable “Somewhat” segment indicates that clarity may not be consistent across teams or situations. CX leaders should focus on standardizing communication around metrics and expectations, ensuring all agents clearly understand how performance is measured and how their actions directly influence outcomes.

Do you feel you have enough visibility into the process and metrics used to measure your performance as an agent?



Forty-five percent of agents view operational processes as “Very Effective,” with another 35% rating them “Somewhat Effective,” suggesting a generally solid operational foundation (another case of good, but not great). This aligns with other findings highlighting improvement needs in escalation procedures and cross-functional communication, reinforcing that processes may work, but are not always seamlessly. CX leaders should focus on simplifying workflows, reducing unnecessary steps, and ensuring consistency across teams, enabling agents to resolve issues more efficiently and with greater confidence. Yes, technology, like AI, are helpful in accomplishing this, but they need to be implemented in a way that brings greater speed and simplification, not greater workflow drag or desktop complexity.

In your opinion, how effective is your organization’s current operational processes (e.g., workflows, procedures) in helping you resolve customer issues?



KEY TAKEAWAYS AND CONSIDERATIONS

The findings from this research highlight a critical and often overlooked truth: the agent experience is not fundamentally broken — it is constrained.

Agents today are motivated, capable, and aligned with the goals of their organizations. With 82% reporting satisfaction (page 13), 88% expressing brand passion (page 17), and 89% recognizing a commitment to customer-first principles (page 26), the human foundation of the contact center remains strong. Additionally, 67% of agents indicate a desire to stay and grow within the field (page 11), reinforcing that this is a workforce willing to invest its time and energies into the future of the industry.

All that said, agents' ability to perform at the highest level is frequently limited by the systems and environments in which they operate. Technology stands out as the most significant barrier. While only 40% of agents report being very satisfied with their tools (page 20), just 50% say their systems are integrated (page 21), and only 41% believe those tools are highly effective (page 19). These challenges are not abstract. Agents directly identify them as priorities, with technology ranking as the top opportunity for improvement (page 24) and 54% pointing to faster, more reliable tools as the greatest opportunity to enhance performance. This level of consistency across responses underscores the fact that system inefficiencies can and do shape the daily agent experience.

Artificial intelligence, while promising, has yet to fully bridge this gap. Although 62% of agents say AI makes their job easier, nearly one in five remain neutral (page 19), suggesting that current implementations are delivering incremental benefits rather than transformative change. AI is easing certain workflows, but is not yet resolving the foundational issues tied to speed, reliability, and system fragmentation.

At the same time, structural gaps within organizations are limiting long-term engagement. While a majority of agents express a desire to build a career in customer care (page 11), only 47% report having clear visibility into career paths (page 11). This disconnect between ambition and opportunity presents a tangible risk to retention, as well as a missed opportunity to develop and retain experienced, eager talent.

Encouragingly, the leadership layer appears relatively strong. With 62% of agents viewing performance measurement as fair (page 15), 54% feeling recognized (page 17), and 84% reporting alignment with organizational goals (page 23), there is clear evidence that many organizations have established effective management practices. This further reinforces that the primary challenges are not rooted in leadership intent, but in operational execution.

Taken together, these findings point to a clear mandate for CX leaders. Improving customer experience outcomes will increasingly depend on improving the agent experience, not only through incremental adjustments, but through more intentional alignment of tools, processes, and organizational structures. Investments in faster, more reliable, and more integrated technologies will be critical to reducing friction and unlocking agent performance.

Ultimately, the path forward is not about choosing between people and technology — it is about bringing them into better alignment. Organizations that succeed will be those that recognize the agent experience as a strategic lever for a better customer experience.

ABOUT EXECS IN THE KNOW



Execs In The Know brings together customer experience (CX) leaders from across industries in an effort to advance the conversation and set a new agenda for delivering amazing experiences for consumers. As a global community of the brightest minds in CX, Execs In The Know provides opportunities to learn, share, network, and engage to innovate. Operating under the motto, “Leaders Learning From Leaders,” Execs In The Know facilitates many opportunities for community engagement, such as its bi-annual national Customer Response Summit and private, online community, Know It All “KIA.” There are also exclusive, laser-focused engagements like industry briefings and executive roundtables. Execs In The Know also guides and informs the industry with a rich tapestry of CX-related content that includes *CX Insight* magazine, industry research, webinars, blogs, and much more.

To learn more about Execs In The Know, visit www.execsintheknow.com.

METHODOLOGY

This report was developed based on results derived from a custom 33-question survey delivered via the SurveyMonkey online platform.

Surveying occurred from November 6, 2025-February 26, 2026. Private invitations to partake in the survey were delivered by email to Execs In The Know members and via promotion within Execs In The Know's private online community, Know It All (KIA). Invitations targeted individuals responsible for managing the customer experience and customer care programs of large Business-to-Consumer (B2C), Business-to-Business (B2B), and B2C/B2B organizations located primarily in the United States and Canada, though with global contact center operations.

The survey benefited from the participation of 107 anonymous agents. See the Survey Participant Overview section (page 5) for more details about those surveyed.



Execs In The Know

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