

Consulting Services

From the Consultant's File: *Tim Montgomery*

Take Your Call Center Back To Basics

During a recent call center manager focus group, one of the participants made the following statement: "Running a call center isn't rocket science – the key is understanding and paying attention to the business you're in." At first, I thought this proclamation was much too simple – call centers are dynamic real-time environments that require us to continuously contemplate, innovate and update. I then began to ask myself: Could it be that, because we keep trying to reinvent the queue, we actually make it harder on ourselves than it has to be?

While mulling over this question, I realized that a lot of the work we do in our consulting practice actually focuses on turning internally created complexity back into basic call center principles. Put another way, often we are called into centers to make the "rocket science" seem simple.

To take a call center "back to the basics," processes need to be added or adjusted based on the level of internal complexity that has been created. Often, the most difficult part of improving a process is knowing where to begin. To help get you started, consider the following 15 questions and suggestions regarding call center procedures.

The Call Center Complexity Quiz

1. Do you have an established service level objective that drives your planning and staffing decisions?

- Service level is often viewed simply as a performance measure or goal for call centers. It is true that it does provide the best overall indicator of caller treatment, but it also serves a much greater purpose. A call center's telephone service level objective provides the foundation for the most important activities in a center: planning, staffing and execution. The service level objective you choose directly influences the number of people you're going to hire, how many people you're going to have on the phone in each hour of the day and when you need to implement a real-time recovery plan.

2. Are you comfortable with the information you are receiving from the reporting systems used to measure your center and agents?

- Reporting systems provide the information needed to efficiently manage a call center, but, in many cases, this information can be misinterpreted and influence the wrong behaviors. Be sure that everyone receiving call center reports understands the calculations and definitions of each item. Call center systems use the same headings for different things, so never assume a meaning until you have checked its exact calculation with the telecom department.

3. Can you measure agent quality and schedule adherence?

- Only two things are within a call center agent's control – quality and schedule adherence. Any productivity measures outside of these (i.e., calls per hour; telephone availability) can encourage the wrong behavior and negatively influence a center's results. To measure schedule adherence, you first have to have a process in place that allows for continual schedule updates. This is a major challenge unto itself, but well worth the effort.

4. Have you developed a plan for your center in the e-enabled world and updated your telephone-only procedures?

- Many of the well-documented principles of running an inbound call center apply to the e-enabled world and everything starts with establishing a service level objective. In the e-enabled world, this is typically in the form of a response time objective (how quickly are you going to get the answer to the customer?). Although the planning and managing processes are similar, to take full advantage of the efficiencies offered in the

e-world, you must update your procedures. First, develop procedures for each type of work and then determine the best way to integrate them into your center. Don't make the procedures fit the call center's current structure.

5. Do you fully understand the importance of forecasting call load, as well as how to accurately measure and continuously improve this process?

- Forecasting is often the forgotten or misapplied element in improving a call center's efficiencies. Forecasting should be done for the call load (volume and handle time) and accuracy measures need to include the total staffing variance. A total staffing variance helps to provide the big picture (how many people did I actually need vs. how many people did I say I needed?).

6. Has implementing your real-time recovery plan become a typical part of every work day?

- A real-time recovery plan should not become part of a call center's daily operating procedures. If managers spend a significant part of each day "managing" the queue, it is normally a sign of a breakdown in the forecasting and scheduling processes. Updating processes to make this the exception instead of the rule helps to improve the overall feel of the environment, can dramatically improve performance measures and can reduce agent frustration.

7. Is your planning and budgeting process challenged because those who make staffing decisions just don't understand call center management?

- One of the most challenging parts of running a call center is securing the people and resources needed to meet customer and organizational expectations. Many times, those making the decisions have never been exposed to basic call center fundamentals and, therefore, don't understand the difference between call center staffing vs. traditional workload staffing. Education is the key. A good place to start is to ensure everyone understands the relationship between service level, staffing and occupancy. Spending the time to educate in advance almost always makes the budget process less painful.

8. Are you able to comfortably answer "what-if" questions regarding the impact of additional workload/process changes? Can you do this in a matter of minutes?

- Establishing and continuously updating a capacity planning model reduces a call center manager's frustration and also improves the perception of the call center throughout the organization. Once established and tested, capacity planning models can be used to quickly answer the tough question: How much is it going to cost? Capacity planning is the first step in creating a true call center planning culture, which is the most basic and necessary element of running an efficient call center.

9. Can you identify where all of the time is going, and are all of these elements included in your short-term and long-term planning?

- Tracking agent activities is done in most call centers and generally provides valuable information on how agents spend their days. Unfortunately, in many cases, the activities measured are only the ones that can be easily captured at the ACD level. For planning processes to be effective, all agent activities must be measured, tracked and trended. Call center managers are often surprised to find that in well-run, efficient centers, agents spend half of their scheduled time dedicated to activities other than directly servicing customers.

10. Do you have a way to effectively measure first-contact resolution?

- Call centers manage to service levels because they don't want customers to wait for service. Basically, any time a customer is placed in a queue, a call center is taking time away from the customer. This same thinking should also be applied to the activities that take place once the call is connected. Any time a customer has to inquire more than once or repeats a request, time is being taken from him or her. First-contact resolution results should be placed right next to the service level on the call center's performance scorecard.

11. Are you comfortable with your current telephone technologies? Are you taking full advantage of their capabilities?

- Call center telephone technology is continuously improving and many call centers follow this trend by upgrading with each new release or update. In many cases, call centers do see improvements with additional technology, but not everyone can afford to upgrade as quickly as the market is changing. Before taking the plunge and moving to the latest version or throwing out your old ACD all together, be sure to fully understand your current system's capabilities and how you're taking advantage of it. You just might find that, by being creative with call flows or processes, your current system still has some life left in it.

12. Have you established key performance indicators at the agent, team, department

and company levels? Are you comfortable with the results?

- It is an unwritten rule in many call centers that, if you can think of something that can happen, it should be measured and reported upon. Ultimately, you end up with an entire department that does nothing but track, trend and report all types of call center information. Having lots of data on your call center is not a bad thing, but there should be a focus on those key indicators that, if improved, can directly affect the business. Once these key indicators have been determined, work backward and identify each department that can directly or indirectly influence each measure. You will then be able to develop manageable goals and objectives to departments outside of the call center.

13. Does your entire call center management team have an understanding of call center dynamics and how they influence the results?

- If operations managers and supervisors are not trained on basic call center dynamics, it can lead to behavior that negatively influences the overall results of the center and creates frustration at the agent level. All leaders in an inbound center should be able to explain agent occupancy – how it's calculated, how it relates to service level and why it exists.

14. Have you communicated what it means to work in a call center to your frontline staff?

- Call centers are different from most other working environments for several reasons of which agents should have a basic understanding. A simple presentation that outlines what it means to work in a call center is a good way to get the ball rolling. One thing you should do before the presentation, though, is to develop a communication about your organization's service level objective (i.e., definitions of the inputs, expected queue lengths, average answer speed translation, the impact of one agent, etc.).

15. Do you track interval staffing variances and continuously update schedules to account for unplanned activities (such as sick days, volume spikes, media, etc.)?

- It all comes down to the interval – you want every one of your customers to have the same chance to get the same level of service. If, at the end of the day, you have met your objectives, however, there were two hours during which customers had a significant wait for service, you might be patting yourself on the back while those customers are looking at your competitors. The key to managing call centers is breaking everything down to each interval, every day. This allows you to create plans that identify potential gaps, include alternatives for service recovery and establish expectations in advance.

These questions and recommendations are not meant to be the complete solution. They are simply suggestions to get you started moving your call center back to the basics.

After a recent brain-storming session with a client regarding scheduling opportunities, the client summed up the challenge in one sentence: "Wow, that sounds like a lot of work." Yes, it is initially a lot of work, but ultimately, it proves to be time well-spent. Running a call center isn't rocket science – and we shouldn't make it any harder than it has to be.

If you would like more information on any of the suggestions discussed above, or to get feedback on a call center issue, feel free to email me at consulting@icmi.com.