

# Ten Things You Can Do to Improve Your Call Center NOW

A White Paper by Lori Bocklund, Vanguard Communications Corporation

## ***Introduction***

In the high energy world of the call center, there is always too much to do *today*. Yet, it is important to occasionally take stock of where we are in our approach to customer contact, where we want to go, and how to get there. This is doubly important in this era of “internet time” and the rapid changes it demands.

Can't figure out how to get started? Here are ten ideas.

### ***1. Build a strategic plan***

Probably the most important thing you can do is build a strategic plan – a vision for customer contact one to three years out. As multimedia becomes an absolute necessity in the call center, and customer relationship management a driving force, companies need to define their vision and develop a strategic plan to reach their goals.

Building a strategic plan can be exciting and fun, bringing together visionaries, subject matter experts, users, and technologists to brainstorm and plan. Figure 1 shows the key steps for a customer contact strategy project. A carefully thought out plan will help your organization leverage new technologies in the rapidly changing customer contact environment. Without a strategic plan, companies waste time and money on short-term fixes and conflicting projects, resulting in sub-optimized technology and resource utilization.

As part of the strategic planning process, you will learn about new technology. The strategy should consider all media and interactions to ensure that your customers are treated consistently and that you use technology effectively across media.

### ***2. Conduct a customer contact assessment***

Take a hard look at the operations and use of technology today in your customer contact center by conducting an assessment. Vanguard considers the following six categories when performing an assessment:

1. Strategy
2. Customer Satisfaction
3. Organizational Design
4. Operations and Processes
5. Use of Technology
6. Measurements and Reports

Assessing the current environment, strengths, weaknesses, and opportunities for improvement is a key first step to improving a call center. And from that assessment of today, a team can start to define what needs to be done tomorrow to achieve the business goals defined. Key steps in an assessment project include call observations and focus groups with customer service representatives and with customers. Ask people who are closest to the customer what's working and what isn't. The assessment and resulting recommendations can point you toward



some key next steps for improvement in your call center. Some of these steps may involve technology, while others may lead to changes in process, organization, training, or other areas.

### *3. Review measurements and reports*

One specific item in the call center assessment is measurements and reports. Even if you're not considering a full assessment, review measurements and reports in your call center. Review current productivity measures and assess if they are the "right" ones. If not, define new ones. And make sure they are achievable with your current staffing and workload. Evaluate your current reports. Are they meeting your needs? Are you getting the right data, too much data, or not enough data? Define reports you need to assess productivity and quality. And study use of login and logout, and workstates. Is everyone using them consistently, and within a well defined context for use and analysis? If not, define clear guidelines for use and a plan for communicating and reinforcing them. Measurements and reports become meaningless if the system features are not used consistently and appropriately.

### *4. Conduct a voice response assessment*

Take a good listen to what your callers are hearing when they reach your voice response or other automated voice systems. Carefully review menus, callflows, logic, clarity, user-friendliness, reports, and other components of your voice response applications. Are you customizing menus based on the needs or value of each caller? Are you leveraging caller history to provide personalized service? Can you save money by reducing the time callers spend in the IVR?

Talk to your callers and to CSRs - you may even uncover some new voice response applications. Redesign or even minor changes in voice response applications can lead to increased use and self-help success. It is also a good time to bone up on some new technology - recent advances in speech recognition provide a great opportunity to enhance touch tone interactions with a new and more effective interface for complex applications.

### *5. Conduct a web response assessment*

"Interactive Web Response" or IWR is the web-based equivalent to Interactive Voice Response (IVR). And not many people are doing it well. Are the types of transactions customers expect available on your web site? Are they consistent with the customers' interactions on other media (in terminology used, workflow processes, and capabilities)? Can customers access personalized information via screens customized to their relationship with your company? These questions are key as you assess your current web capabilities for customer contact, and plan for future enhancements. Again, critical changes can lead to increased utilization and self-help (and thus lower operating costs in the customer contact center).

### *6. Audit your call flow*

Many call centers today are in a real mess when it comes to how calls come into their centers and actually reach an agent. Does your customer have to understand the inner workings of the company in order to figure out which number to dial? Does everyone understand the skills and routing paths and why they are there? Are all skills really used, or are there some "mystery skills," the purpose of which no one can quite remember?



Map out and identify your existing dialing plan, skills, and call flows. Then evaluate customer access and streamline numbering plans or call routing menus. Simplify call flows and skills wherever possible. This will result in call routing that is easier to maintain and troubleshoot, and provides greater flexibility as your center grows and changes.

#### *7. Audit your work flow*

Similar to a call flow audit, a work flow audit starts by mapping out existing work flows. Many call centers today have cumbersome and inefficient work flows, or work flows that don't ensure follow through and commitment. So look at the work flows carefully, and design improved steps and processes. Streamline where possible. And identify the factors that must change to support the new work flow – whether it is technology, training, internal communications, or policies and procedures.

#### *8. Build or revamp your quality monitoring program*

Quality monitoring is a hot topic today. Many companies are purchasing or planning to purchase technology tools to support quality monitoring, recording, and scoring. But that is just one piece of the puzzle. You need a well-defined plan that includes call monitoring, scoring, feedback, and action plan processes. Involve customer service representatives in the design of the plan. Run a pilot that is not technology based, but tests the scoring methods and feedback so that when you implement the technology, you can leverage it better and faster. If appropriate, define the requirements for the quality monitoring technology and proceed to an evaluation and selection process (see item 10).

#### *9. Fine tune your training and communications programs*

Most call centers would love to shorten their training time, so take time to review your training program. Conduct focus groups with CSRs and get ideas for improvement in initial training or ongoing training, or ways to shorten training. Consider new methods and tools, such as mentor programs or on-line training. As you consider ongoing training, review your internal communications processes. Are they effective? Is information overload starting to occur? Define processes and procedures to get the greatest value and effectiveness in communicating within the call center, and with other parts of the organization.

#### *10. Plan an email response, routing, and management plan*

Email is starting to pour into call centers, and may be a key part of your strategic vision for customer contact. But do you have processes in place to deal with it? Most companies are at the preliminary stages of managing email. Like quality monitoring, email response planning focuses on both process design and requirements definition for technology. You'll also want to critically evaluate organizational design – where does email handling belong, and is it in the appropriate place today? Do you need new hiring and training plans, or even pay plans, to support handling of email? Do you have response time commitments and mechanisms to ensure they are met? What about marketing campaigns to encourage use once processes and technology are in place? These are all key questions that most companies must start answering *soon*.



## Next Steps

Getting started on major call center changes can be daunting. Natural inertia, exacerbated by the pressure of day-to-day operations, can make these steps a real challenge. And chances are you can't do it all. Prioritize, and pick a few projects that will produce the biggest bang for the buck, or will address the greatest needs in your call center. Then, don't forget a couple key factors that may be critical to project success:

### *Build a business case for new technology*

Many of the projects above will lead to "wish lists" for new technology. In most companies, you need a strong business case to support those wishes – based on *business needs*. So figure out the top items on your wish list and start building a business case for each. First, establish a baseline of how things are currently accomplished. Do time and motion studies, brainstorm the assumptions needed to support a business case, gather the cost and benefit data you need. And build a model to show the payback that will be achieved over time from the key technologies that you are planning for in the coming years.

### *Evaluate products and services*

Evaluate products and services to support the recommendations and changes you identified in the tasks you choose to tackle. Document your requirements. Analyze alternatives. Get vendor demos. Conduct site visits and reference checks. Do your homework and find the best solution to meet your needs – whether in quality monitoring tools, email response, routing, and reporting tools, multimedia queuing solutions, speech recognition, customer relationship management systems, or computer telephony integration.

Conduct the selected projects in the context of an overall vision, with the business needs leading the way. Then, incremental steps you take will support a long-term objective, while delivering near-term results. Get started now!

Figure 1: Key Steps to Building a Customer Contact Strategy

