Moving Beyond the Queue

Focusing on the Real-Time Customer

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Abstract

Forward thinking companies are developing new ways to refocus themselves on the new “real-time” customer and use customers in new ways to provide the organization with valuable information on what’s really happening. By appreciating the real-time customer and understanding the right things on which to focus, companies can position themselves for success in this new era of service. In this paper, Tim Montgomery, a highly regarded industry consultant, speaker and author explores new ideas on ways every call center can keep up with new customer demands. Specific topics include:

- Five Attributes of the Best “Real-Time Customer” Call Centers
- Communicating the “Real” Value of the Call Center
- How to Make Others Want to Move Forward
- The Key to Real-Time Resolution

Customers are now in control of business, and today's call centers have the unenviable task of meeting and managing customer expectations that are moving at a lightning-fast pace. The shift in control began with companies' increasing reliance on the Internet, which has given birth to a whole new host of customer complaint (and accolade) tools — e.g., blogs, audio files, YouTube videos and customer-powered websites that focus on satisfaction and dissatisfaction with specific products and services.

Many companies lack the ability to keep up with the new pace of change, and the old ways of establishing yourself as a service leader are no longer effective. Companies now must be sure to establish a culture of customer-centricity, with everyone in the organization trained to understand and appreciate the value of great service — no small feat. In addition, world class companies of today include customers in determining their real-time service expectations, and realize that customers are their new marketing vehicle.

"Be afraid of customers..." — Jeff Bezos, Amazon.com CEO

The shift to customer control is so well positioned that many companies have moved away from celebrating survey success to focusing more on critical real-time indicators, such as the customer blogs, websites, discussion forums, etc., already alluded to. By paying more attention to these forums, forward-thinking companies are connecting their processes with the ever-changing expectations of those they serve. Gone are the days where a 95% satisfaction rate is something to brag about — in fact, if you're an eBay seller, anything below a 98% satisfaction rating will push people away. We're in an era where consumers expect multimillion dollar companies to be able to provide service that is just as friendly and personalized as that provided by the small mom and pop shop down the street. Thus, the new challenge for call centers is getting everyone in the center to think of themselves as providing "mom and pop" type service. This may sound like an unrealistic endeavor, but the fact is, top companies are doing it and using it to create additional competitive advantage with every interaction.

What follows are ideas on ways companies can refocus themselves on the new "real-time" customer and use customers in new ways to provide the organization with valuable information on what's really happening. By appreciating the real-time customer and understanding the right things on which to focus, companies can position themselves for success in this new era of service. Best of all, the call center is well positioned to be the key enabler of success in this new era of customer control.

Five Attributes of the Best "Real-Time Customer" Call Centers

1. They are proactive in providing resolutions — no complaint required.

Let's face it, most customer service activities are not generated by a customer that just wants to commend you for providing a wonderful product or service. The call center is generally the place the customer looks to for issue or problem resolution. Armed with this realization, the best call centers are finding new ways to get out in front of the issue — using real-time information to generate proactive resolutions.

Something we've all experienced at one time or another is the loss of a cable signal or a power outage. Our first reaction is to contact the company to let them know there is a problem, and most of the time scores of other people have already done so — the recording tells you so. Every call center can learn something from the utility companies — when you see trends from a certain customer profile, do something in advance. Don't wait for an issue that impacts a small portion of your customers to become a problem for all of your customers. If you do, everyone will suffer because of the increase in volume.

2. They are focused on employee loyalty as much as on customer loyalty.

It's amazing how many times the same story gets written — happier employees provide better service. Unfortunately, many call centers forget this and spend their time focused on increasing customer satisfaction scores while trying to control the agent efficiency metrics. This often results in a vicious cycle that features a lot of finger pointing with very little improvement in either customer satisfaction or agent efficiency; in fact both often move in a negative direction.

Let's face it, the call center rep isn't the most glamorous or desired job in the company. Our industry turnover rates prove this. Often agents' plans involve "doing their time" then moving to a job off the phones.

The best companies treat the agent position with the respect it deserves — viewing agents as "voice of the company." It's no surprise that organizations that are known for providing great service have lower turnover rates and happier employees. You have to spend the time understanding what your employees want; you'll find that call center reps are pretty simple. They'd love to come to work and have some expectation of their daily workload, be provided the tools to be successful and have more flexibility. All this can be accomplished by moving from managing the queues to managing the process. Every call center can do this, but the reality is, most make it a lot harder than it has to be.

3. They are visual in their dedication to customer service and the people that provide it.

Celebrating a win is normally reserved for a sports team, but it is also a key enabler to successful customer service. The reality is that call center agents have several "wins" every day that should be discussed, documented and rewarded. It starts with helping agents to see things from the customer's perspective, then, empowering them to make decisions and make a difference. Let agents know that it is okay to make mistakes as long as the best interest of the customer is the root cause. Be sure to reward the effort, and to share successes with others.

"The way we have grown the company is focusing on customer service and not actually spending a lot of money on marketing or paid advertising. We take the money we would have spent on advertising campaigns and instead put that back into the customer experience and grow through repeat customers and word of mouth."

— Tony Hsieh, Zappos.com CEO

Meetings with agents are often driven by a new initiative or a desire to "educate" them on everything that has happened since the last meeting. A great way to create a "visual" dedication to service is to schedule quick daily or weekly "win" meetings, where the entire team can tell others about the wonderful things they did for customers since the last meeting. Everyone learns and starts to see the value of going above and beyond. The leadership team can reinforce this by making wins a part of their daily discussions — followed by rewards and celebrations. The best part for agents is that they'll quickly realize they are in control of their own wins and that they have several opportunities to win every day. Everyone benefits — the agents, the organization and, most importantly, the customer.

4. They are in-touch with their customer's real feelings and involve them in products and solutions.

As mentioned earlier, top call centers pay more attention to what their customers are saying on blogs, YouTube, discussion forums, etc. These customers used to be dismissed as "complainers" and not the "target" audience; today, however, they are now viewed as the real influencers. Their postings often point out the real problems and opportunities that don't show up in customer satisfaction survey results.

"The team was managing cost instead of managing service and quality. It's totally the wrong answer. Stop managing for cost. Manage for a great experience."

— Michael Dell on Dell, Fortune Magazine

One of the best ways to really understand how your customers feel is to send them a three-question survey: 1. What did you like about the last interaction; 2. What didn't you like; and 3. What can we do better next time? Then, once you hear back from customers, follow-up and do something... real-time.

5. They are fanatical about leadership and provide the tools for success.

A common mistake in call centers is not investing in the growth of the leaders. Call centers do a significant amount of internal promotion — moving agents into supervisor or management positions, but few call centers have the luxury of formal one-on-one development or mentoring programs to grow new supervisors. Most call centers often find themselves at the lower end of the maturity model — few people in the organization with a formal understanding of the foundational requirements of call center leadership. This knowledge gap makes it harder for new and upcoming leaders to gain a full appreciation of what it takes to effectively navigate the call center waters.

You would never expect a fireman to be able to do their job without spending a significant amount of time training, learning and practicing. While call centers don't put leaders in life or death situations, several managers say they spend a significant amount of time putting out fires. Every organization should develop a formal on-boarding program for new leaders — a plan that outlines the training programs, policies and evaluation criteria. By documenting the expected activities and holding monthly progress meetings, your new leaders will be engaged in the activity that makes every person (and organization) better through continuous improvement. Once you've done it just a few times, you'll create the internal mentors with the expertise to transfer the right knowledge to your upcoming leaders.

Communicating the "Real" Value of the Call Center

Don't just measure — create action.

The majority of call centers are very metrics-oriented, measuring everything because they can. Metrics reporting is one of the fasting growing segments of the call center technology industry. Many times we overload call center agents and leaders with numbers to the point that no one really knows where they are or what to improve. Call centers need to make it easy for everyone to understand what's really happening now and what needs to change, and to provide such information on a real-time basis along with the required actions. Given the number of disparate systems, pulling everything together is no easy task. However, the best companies are findings ways to make this happen.

Clearly defining the desired behaviors is especially important at the agent level, as their behaviors are what the customers experience. Metrics are simply indicators of opportunities that something needs to change. Leaders in the best call centers know they must connect with agents on a level that makes them want to change their behavior, not just the metrics. Often the hardest part of making this transition isn't getting the agents onboard, but changing the mindset and behaviors of the leadership team. The entire leadership team must have a complete understanding of the basics of call center management activities that drive results — queuing theory, forecasting, planning, staffing, occupancy, quality and adherence. And, they have to know this like the back of their hand — it's the price of admission to becoming world class.

Focus on first-contact resolution.

Improvements in first-contact resolution (FCR) rates can be directly correlated to improvements in customer loyalty, employee delight, operational efficiencies and sales growth. In other words, FCR hits both the top and bottom line. Some companies struggle with this because they say it's hard to get the real numbers — not so, just ask your customers that have called. This can be done via post-contact IVR surveys, email surveys or phone surveys. Make it simple by just asking them if they got what they needed the first time they requested it.

More important than the FCR metric itself is understanding the success drivers and foundational elements that must be in place. If you're not meeting your service level on a regular basis (by interval), you'll never see improvements in FCR, as frustrated callers will hang up and call back later. They'll rate you low because you didn't solve the issue on their first call to you. Even if you get the service level part right, if you're not providing quality, customers will be forced to call back because they don't feel comfortable with the resolution, or because what was promised didn't happen. Ultimately, the lack of quality will negatively impact service level and vice versa — resulting in no actual FCR improvement.

Look beyond up-selling and cross-selling to create enterprise-wide value.

Conversations about creating value in a call center are often limited to the amount of new revenue opportunities the center can create. Centers then start to focus on cross-selling or up-selling activities. It's true that call centers can become sources of additional revenue, but not without getting the foundational things right. Many companies have invested heavily in agent training to give them skills to "sell," but fail on creating an environment where the customer will be receptive to the offering. If the customer doesn't feel valued, offering them new opportunities will just drive them further from the organization.

The best call centers know that the real value of the call center is in every interaction. After each call, train agents to ask such questions as "How can we avoid making customers call us about this issue in the future?" and "Who else in the organization would benefit from hearing the real voice of the customer?" These two simple questions will unlock a tremendous amount of value for your call center. Your customers are telling you what they really want hundreds of times a day. The key is to create a way for your agents to pass along critical information that can lead to quick and meaningful action.

Create a roadmap for everyone.

One thing call centers don't have is a way to overcome the mathematical inefficiency that actually requires a portion of the center's agents to always be "sitting around." While we can do things to help fill some of the gaps with other types of work, there is nothing we can do to make everyone take a call when senior management ventures through the center. Management is often left with an unsettling feeling that money is being wasted because some of the people aren't on the phone. Overcoming this mindset starts with educating yourself in queuing theory and using this knowledge to explain things in laymen terms to senior management. Spending a couple of hours creating some what-if scenarios in an Erlang calculator will provide you with several new ways to engage executives in appreciating the real complexity of running a call center.

Numbers alone won't get you all of the support you need to move your center forward. Spend some time creating an understanding and appreciation for the role you play in the organization's success. In every business there is a critical path to profit or fulfillment — simply put, the most efficient way for the organization to reach its goal. For example, in the case of an online retailer, the most profitable path would be the customer placing the order online, paying online, receiving the exact product when promised and being happy with it. Any deviation from this self-service path (i.e., phone calls) costs the company more money in support. This is true, but if every one of those phone calls is viewed as a way to help improve the path for future customers, it's not all money wasted. Being able to connect the value of every interaction with the organization's critical path is key to getting additional support and investments.

How to Make Others Want to Move Forward

"Senior management just doesn't understand." That's a battle cry heard time and again from call center managers who are struggling with issues such as staffing, getting support for new technology or obtaining respect for their department. The recommended response is always the same: It's the job of call center leaders to get them to understand, and you can't stop until everyone appreciates the value and dynamics of our real-time inbound environment. The easiest solution is making it happen in targeted, digestible chunks. I've worked with many smart people who, for one reason or another, have adopted a "keeping your head above water" approach to call center management.

"There is only one way under high Heaven to get anybody to do anything. Did you ever stop and think of that? Yes, just one way. And that is by making the other person want to do it. Remember, there is NO other way."

— Dale Carnegie

The truth is that many senior executives with call center responsibilities have never run a call center. In many cases, they're focused on other organizational issues that pull them away from gaining a true understanding of our challenges. But that's not a bad thing — it actually makes it a lot easier to transform their opinions.

Lay the foundation by getting yourself up to speed.

First and foremost, you need to be on top of your game. Make sure that you are able to intelligently describe the tactical stuff, and make the connection between the call center and the value it brings to the company. Yes, to get buy-in from others, you have to become a student of call centers and continually look for ways to sharpen your own skills.

Don't try to reinvent the wheel — chances are, if you're reading this, you're looking for new ideas, which is a great first step. Make sure that your knowledge of call centers is not only accurate, but current as well. Attend conferences, seminars and training courses that focus on the basics of call center management, or more advanced courses on strategy and technology (there are several organizations that offer these types of programs). Another way to keep abreast of the latest trends is to subscribe to — and actually *read* — as many industry publications as you can. There are lots of free ones available and most provide weekly email updates.

While you're getting yourself up to speed, try to get a feel for what your senior management is reading. Many times, their ideas and strategies are derived from popular business books and non-call center periodicals. The next time you're in a senior manager's office, look to see what newspapers, magazines and books are laying around — and then get a copy for yourself. You'd be surprised at how many ideas and theories from mainstream articles and books can be applied to the call center environment. The best part is, you can use it as point of reference the next time you have an opportunity to "talk call centers" with the boss.

Once you get senior management onboard, everything else becomes easy. Keep focusing on the value of the call center and pointing everyone back to the customer as the driver of all improvements. Anyone, at any level, has the ability to drive change in a call center — the key is to never give up and to keep putting everyone in the shoes of the customer. The best call centers know that you'll never grow until every agent knows what it really feels like to be on the other side of a call. And, every organization has several ways to make this happen — you're only limited by your imagination and creativity.

The Key to Real-Time Resolution — Planning and Access to the Right Information

Every call center is unique, but they all have a common thread — the way the work arrives. Calls appear in a continual, random pattern and must be answered within seconds of delivery. To address this challenge, many call centers have implemented creative forecasting, planning and scheduling processes. No matter how effective this process, at some point, the incoming calls will outweigh the workforce and calls will queue. Typically, this is when the fun begins and everyone's life seems to change a little. A commonly overlooked fact is that queues are part of the plan and not necessarily a bad thing. Unless you have a service level objective of 100 percent in zero seconds, you're planning to allow a certain number of calls enter the queue. Managing queues is what your automatic call distributor (ACD) is designed for — it grabs those calls that can't be answered immediately and holds them until an agent becomes available.

An effective real-time queue management program is essential to running an efficient inbound call center, but it's often the piece that's left out of the planning process. Following are a few considerations for establishing or updating a real-time recovery program.

Continually update your real-time plan.

Your ability to institute a successful real-time recovery program starts with an effective planning and scheduling process. This process must include the ability to look ahead to the coming week and identify the intervals that lack the minimum number of phone agents required to meet your service level objective. This capability is a common component of most workforce management systems and can be manually tracked via a spreadsheet or database application. If you do not have a process in place that allows you to look ahead and review staffing gaps by interval, you should implement one before moving forward with a real-time recovery plan.

Once you have a process that allows for ongoing staffing gap analysis by interval, it is important to keep it updated. If you create schedules several weeks in advance, they need to be continuously updated with all changes that will affect the number of employees planned for incoming calls. This includes changes to the volume forecasts, last-minute agent training/ meetings, short-term disability, etc.

Last, and most important, your plan must be updated with the last-minute changes first thing in the morning (e.g., sick leave, broken-down cars, sick children, etc.). This will give you an accurate picture of the workforce availability and will provide you with ample time to review alternatives for any intervals that look hopeless. Your current day planning does not end after your initial morning update. Additional unexpected events will influence your workforce throughout the day and the plan must be adjusted accordingly.

Communicate expectations to the front line.

The key to a successful real-time recovery program is the communication of expectations. The first step is to develop a process of communicating the expected workforce variances and any last-minute changes to the plan. This can be accomplished by consolidating the expected workforce variances by interval for an entire week on one spreadsheet. The spreadsheet, along with the ongoing updates, could then be emailed or posted on an intranet site. Providing this continual "snapshot" of the workforce and workload distribution by interval will eliminate many of the queue surprises that tend to catch everyone off guard. If the snapshot shows fewer people staffed than needed to meet the minimum service level, the odds are that you're going to have calls in queue and everyone should be prepared.

Once the plan is communicated to the front line, expectations should be clear as to what actions are to be taken. If you have cross-trained agents who can handle response time activities (i.e., email, fax), you may have them log onto the phone once your queue threshold has been exceeded. Better yet, in the intervals when the plan is at a significant deficit, you could have them log onto the phone in advance and avoid the painfully long process of driving down the queue. You'll need to recover the time lost against the response time activities and move phone agents into non-inbound modes during intervals when the plan illustrates excess capacity.

Don't base actions on static numbers.

Once you've defined and communicated the actions to be taken, you will need to determine when the program should be implemented and when to escalate to the next level. Using static indicators as criteria for implementation will result in over- or under-reacting in many cases. For example, let's say the first phase of your plan is to begin when your expected interval-staffing shortfall is at negative five. A staffing deficit of negative five will result in significantly longer hold times when the required staffing is 20 than it will when the required staffing is 40. Using a single number as your threshold tends to mask the urgency in your lower volume intervals. A good method for setting your proactive adjustment threshold is to use a percentage approach — plan to invoke different phases based on the deficit percentage and not a static number.

This same approach should be used for those intervals when the calls don't arrive as planned and you need immediate help. You'll first have to work with an Erlang program to get a feel for the "planned" number of calls in queue based on the expected volume for the time of day. Next, determine how long the threshold can be exceeded before enacting the plan. It'll take a few attempts to get this right but once established, it will definitely reduce the number of "hair-on-fire" events.

Monitor by skill group, not by team.

Your real-time recovery program and ongoing gap planning should be done at the skill level or the highest level of group overflow. Managing this activity at a team level, when calls are shared with other groups or sites, becomes a coordination nightmare. This activity should be monitored at the same level in which the volume is forecasted — your schedules are created against this forecast, so all real-time updates and actions should follow the same process.

With the addition of new media, many call center agents have moved from call handling to other interactions, such as chat or email. In some cases, their workload has shifted to handling only the new media. It's a good practice to keep an updated list of all people who have been trained in telephone skills and who can be called upon on short notice. You should also have an alumni list of people who have migrated out of the call center to other parts of the organization and who can be counted on during emergencies.

Educate to eliminate the "attack the queue" philosophy.

As discussed earlier, queues are a necessary part of the plan to take full advantage of the efficiencies gained by implementing an ACD. As call centers evolve and establish service level objectives, rewards and punishments based on these objectives quickly follow. To ensure these objectives are consistency met, many call centers establish what is best described as an "attack the queue" approach to meeting service level. When fully implemented, this approach has everyone in the organization panic-stricken when calls are in queue, and all other activities in the center are put on hold until the queue is driven down to zero. Typical results from this approach are higher-than-desired service levels, lower-than-expected workforce efficiency, agent/manager frustration and continuous non-telephone event rescheduling.

Overcoming this mindset is not an easy task, and to sustain it, you must have buy-in from the top of the organization. This requires educating everyone who influences the call centers results — from front-line agents to the senior executives. Don't worry, you don't have to train everyone to be a call center expert — 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 on your organization's service level objective (e.g., definitions of the inputs, expected queues length, average answer speed translation, impact of one agent, etc.).

By making just a few changes to your real-time recovery program, many of the unpleasant tasks associated with running and working in call centers become much easier.

About Tim Montgomery

As a seasoned industry executive, popular speaker and highly regarded consultant, Tim Montgomery has guided thousands of contact center agents and leaders to improve individual and team performance, and exceed operational objectives. Drawing from these interactions and his extensive real-world experience, he founded The Service Level Group to help customer service centers leverage the competitive advantages they have right at their finger tips. He is part of an elite group of independent consultants who have earned a certified associate designation from the International Customer Management Institute (ICMI) and is also a professional member of the National Speakers Association (NSA).

His firm grasp of real-world contact center solutions began with 14 years of hands-on operational experience. During his career, he held a variety of leadership positions from Call Center Manager to Vice President of Sales and Operations. Tim's experience was fine-tuned by leading contact center and customer service operations for three of the most celebrated companies in the world: The Coca-Cola Company, The SCOOTER Store and USAA.

His consulting clients have included some of America's most recognized organizations — DELL, Allstate, Mitsubishi, Cash America, Sykes, Farmers Insurance, Gartner Group, Kodak, ADP, Liberty Mutual, Lifetouch, Golden West, Dept. of Veterans Affairs, AIG, Cinergy and many more. He can be reached at timm@servicelevelgroup.com.

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Inova Solutions is a leading global provider of performance optimization solutions for the contact center, help desk and network operations center. Inova's products integrate data from existing systems to provide unified views of live and historical metrics across organizational levels for improved decision making and increased productivity. Superior technology, world-class services and support, and two decades of industry experience allows Inova to craft powerful solutions that deliver measurable results to a diverse customer base ranging from emerging growth to Fortune and Blue Chip companies. Learn more at www.inovasolutions.com.