Escalation Manager app

### Background

Contact centres can take a number of forms, some are in-house and exist purely to serve the customer base of the company of which they are a part, for example an energy company may have an in-house contact centre to assist customers with transfer, billing and prepayment issues. Another form is a third-party contact centre, which either provide a customer service experience for a company as if it were an in-house operation or as a multi-channel contact centre which provides customer service for a variety of clients, through a variety of mediums such as phone, email, social media or even video call.

Contact centres of all types have a business requirement and a legal obligation to maintain records of their contact with customers and therefore use Customer Relationship Management (CRM) software such as Microsoft Dynamics, Zendesk or Salesforce, as examples.

CRM systems allow agents to create a record of a contact for a customer and recall information from previous contacts so that a record of a customer interaction with the company can be kept, allowing better service to be offered, issues to be resolved and a more personal service given. An inescapable factor in customer service is that sometimes a customer will not be happy with the service that has been provided or with a certain policy that the company implements which may in some way inconvenience the customer.

In this situation it is common for a customer to request contact from a senior member of staff either to complain about an agent’s behaviour, or in the hope that a more senior member of staff may have the authority or expertise to resolve an issue that the front-line agent could not. This is referred to as an escalation and most contact centres have an escalation route where a customer may escalate to a Team Leader, then perhaps a Shift Manager after which a written complaint may be required or a referral to an Ombudsman should be made.

Escalations cost contact centres money in a number of ways, an escalated call is often much longer than a standard call, keeping an agent spending much longer on the call and not servicing other callers. Then a member of the management team also needs to speak to the customer, which often takes much longer than a standard call again, taking them away from other, more productive duties. Escalated contacts often result in goodwill gestures being offered, discounts or refunds, all of which cost the company more money than if an issue had a first call resolution.

Most CRM’s handle escalated contacts within the normal workflow and they are treated like any other contact with the customer. Additionally, in a multi-channel contact centre there may be multiple CRMs in use for different client companies and so it is difficult for management and resource planning departments to gain metrics for escalations. This is a problem because it is impossible to measure the full cost of escalations, the impact to daily call handling performance, the amount of demand escalations place on front line supervisors and therefore makes it very difficult to strategize when trying to reduce the number of escalations handled.

My knowledge of this problem stems from having been a contact centre Team Leader for three years and finding it frustrating that I did not have the tools to evaluate the escalation rates for my team members, I could not identify how many escalations were being transferred as not all of the staff I was responsible for worked at the same time as me, and not all of their escalations came directly to me as it was a multi-channel contact centre and so there were subject matter experts for different clients companies.

The benefits of solving this problem should appeal to all users. In my experience most contact centre agents care about their customers and the issues they have dealt with and so a system which gives them the ability to track their issues and how they are resolved would help agents realise how such an issue should be resolved and will give them a sense of closure after a difficult call, helping to maintain morale.

It will help team leaders to monitor their workload, i.e., a list of outstanding escalation call-backs waiting to be completed. It will allow team leaders to identify which team members are forwarding escalations on and for what kind of reason, this could help team leaders to focus personal development plans for agents to help reduce these numbers, and it may allow incentives and rewards to be offered for good performance in this respect.

Senior management will benefit from the ability to monitor escalations more closely in that they can monitor escalation metrics on a team, by team basis and ask team leaders with underperforming teams to apply focus to that issue and senior management will also be able to monitor the performance of the team leaders in respect of how many escalations they resolve, how quickly they respond if they are not taken immediately and the types of resolutions which are offered, giving a real insight into the cost of escalations and the performance of the team leaders.

The IT aspects of the solution are that a system is required that can store and retrieve information, allows users to log in and view cases, add more information about a contact or information passed back from a client company, create new cases and assign cases to agents or team leaders for action to be taken. This requires a database for cases along with a set of users with differing permission levels depending on their role.

A web based front end will allow ease of deployment and remote access for management if necessary. A metrics tool within the app to allow senior staff to measure various metrics about escalations.

I intend to deliver a working application with a user log in and the ability to create, edit and close escalations, with a search function to find existing escalations by criteria and the ability for open escalations to be assigned to staff for action or to be left ‘awaiting customer input’ then automatically closed after a prescribed period. The application will have a web interface which can be hosted on an internal network for the purposes of Data Protection and GDPR.

I have created some wireframe mock-ups to illustrate how the app might look.

I’d appreciate any feedback you have, some things to consider are:

* Do you think it is a good idea at all?
* Do you think it would work better than sharepoint?
* Do you think that there would be a business benefit?
* Do you see any potential pitfalls?
* How do you think agents might react to the system?
* How do you think TL’s might react?
* Is there anything you would add/remove?

And any other things you think might be an issue or something to consider.

Many thanks for taking the time to have a look.

Glen

Mockups:

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