

In my consulting work over three decades, it's been my privilege to sit next to hundreds of customer service agents, across many industries, as they've made these connections in the course of their daily work. Sure, there are the routine interactions that neither the customer nor the agent will remember for very long, but I have witnessed many calls for help that were full of emotion and significance.

There was the homeowner who needed urgent assistance from her insurance company after a natural disaster destroyed her family's home; the retiree not sure how to access the benefits he worked for all of his life; the scared mother of a small child who accidentally ingested a household product; the manager struggling to get her computer working before the biggest presentation of her young career; the person newly diagnosed with a frightening medical condition whose outreach was the first step in the treatment journey.

If you think about it, it's amazing. When it's set up well, we can—right now—reach someone who cares and who has the expertise and resources to help.

There were many developments that had to happen to enable these connections to take place. So ... just for a moment ... let's go back and see how it all got started.

The Birth of Instant Communication

If you're in Washington D.C. and have the opportunity, consider a visit to Hotel Monaco.

The ultra-high ceilings and classical architecture are amazing. The building was the city's original post office and, more significantly, where inventor Samuel B. Morse opened and operated the first public telegraph office.

Telegraph enabled the transmission of Morse code, a signaling system of short and long

beeps. (You may have seen telegraph systems in historical movies.) Messages that took ships or land carriers days or weeks to deliver could now be relayed in seconds. You get a sense of the awe that this new technology inspired in the words of the first transmission Morse sent on May 24, 1844: "What hath God wrought?"

I believe Morse and others who were there that day got a glimpse into an astonishing future—instant communication across vast distances. I can only imagine their wonderment had they lived to see the communication capabilities we now carry in the palms of our hands.

The immediacy of telegraph helped inspire other advancements in communication. The telephone, invented in 1876, quickly became part of everyday life. And it had a big advantage over telegraph: it could be used by anyone, with no special training required. Its ease of use led to rapid growth—a parallel we see today in smartphones.

Immediate communication became the new normal. French artist Pierre Puvis de Chavannes wrote, "By the wondrous agency of electricity, speech flashes through space and, swift as lightning, bearing tidings of good and evil." Historian John Brooks described the impact of the telephone on life in the first decade of the 1900s this way: "In city and country alike, the telephone was creating a new habit of mind—a habit of tenseness and alertness, of demanding and expecting immediate results, whether in business, love or other forms of social interaction."

The First Call Centers

In the early 1900s, fast-growing demand in transportation and communication services was creating new challenges. Whether it was roads, rails, runways or relay circuits, the pressure was on to get capacity in place. And business leaders struggled to understand how these new capabilities would change customer behavior.

As the subscriber base grew, telephone companies were contending with a perplexing resource-planning problem. Human operators were required to establish connections for customers, as automated "central offices" hadn't yet been invented. The big question was, how many operators were needed? Too few, and long waits would be unacceptable to customers. But too many would be inefficient and drive up costs.

Further complicating the issue, the calls came in randomly, driven by the myriad of motivations individuals had for placing calls. It was one thing to get physical infrastructure in place. But it was a different challenge altogether to get ever-changing calling demand and patterns accurately matched up with the correct number of human operators—day in and day out.

Service that was slow or unavailable was unacceptable to a public that had thoroughly embraced this new means of communication.

In the years that followed, many bright people would grapple with these and related resource management challenges. One of the first was A.K. Erlang, an engineer with the Copenhagen Telephone Company in Denmark. In 1917, he developed the formula now called Erlang C, which is widely used in today's contact centers to calculate staffing requirements. Others who followed Erlang worked on forecasting techniques, scheduling methodologies, measurements and objectives, and, more recently, systems and software that enable the vast range of

capabilities now available.

Today's Contact Centers

Today—over a century later—even as speed and innovation have reached levels previously unimaginable, there are unmistakable similarities in the challenges and opportunities communications capabilities create. We see significant breakthroughs, from social networks that connect us in new and powerful ways to multimedia capabilities that can instantly put us face-to-face. What Brookes described in the early 1900s is as true as ever: communications capabilities have us “demanding and expecting immediate results.”

And if you manage a modern contact center, there is a familiar ring to the demands the early telephone switchboards faced. Accurately matching resources to customer needs in a dynamic, always-changing environment is an ever-present challenge. Forecasting the workload, getting the right people and other resources in place at the right times, meeting customer expectations—these continue to be key objectives and competitive necessities.

However, the value contact centers create has evolved by leaps and bounds. Today's contact centers handle work that is, in a very real sense, already escalated—the complex issues not immediately resolved through search, online resources, self-service capabilities, or other means. They enable customers to quickly reach the help they need. And they empower the organization to listen, engage, and learn.

When fully leveraged, contact centers capture insight that enables the organization to improve products, services, and processes—and the overall customer experience. They bring order to what is otherwise an enormous challenge in serving customers and understanding their evolving needs and wants.

A Definition for Contact Center Management

The International Customer Management Institute (ICMI) defines contact center management as “the art of having the right number of properly skilled people and supporting resources in place at the right times to handle an accurately forecasted workload, at service level and with quality.” This definition can be boiled down to two major objectives: 1) get the right resources in place at the right times, and 2) do the right things. Let's take a look at each.

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The Right Resources in Place at the Right Times

To deliver consistently high levels of service, you need a strategy that defines how you will interact with customers. We'll look at the importance of developing and maintaining an effective “customer access strategy” in Chapter 2. Then, you will need a systematic planning and management process, which can be summarized in nine steps: