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What Readers Are Saying About This Edition

"Brad Cleveland is a towering intellect in the domain of strategy and operations. Those who have had the good fortune to hear him speak, or work side-by-side with him will know exactly what I mean. But those are Brad's hit singles; this new book is a "best of" compilation album."

A. ROGER PAULSON

Customer Service Practice Director, UW E-Business Consortium, University of Wisconsin–Madison

"Brad Cleveland has written a must-read book for anyone who wants to expand their knowledge, in a manner that is both informative and fun to read."

DOUG CASTERTON

Head of Global Workforce Planning & Scheduling, TripAdvisor

"NASA or mom-and-pop grocery, successful customer engagement is key. This book is practical, accessible and inspiring!"

ELLIE NEWMAN

Radio Show Host, That Got Me Thinking

"If you are a contact center leader who is looking to expand your knowledge of customer experience, you could not find a better resource than this. When it comes to customer experience management, there is no one more credible or thoughtful than Brad Cleveland."

NATE BROWN

Head of Customer Experience, UL (Underwriters Laboratories) EHS Sustainability

"Contact Center Management on Fast Forward is the 'go-to' resource for our contact centre leaders. This update cements this book's position as the leading reference in this fast-changing industry."

BRIDGET BRILL

General Manager, Operations Management Division, Department of Human Services, Commonwealth of Australia

"Outstanding ... Contact Center Management on Fast Forward has served as a blueprint, guide, training manual and crutch for me and my leadership team to lean on. This is essential and a must-read for all professionals, even those outside of the customer service space."

PAUL L. TURNER

Vice President, Health Operations, WebMD

"This latest edition perfectly captures the evolving landscape of operations and contact centers, focused on the human connection that continues to drive loyalty and profits for today's

successful businesses.”

VICKIE FRIECE

Senior Vice President of Operations, Service Delivery/Funding and Reconciliation, MetaBank

“Contact Center Management on Fast Forward breaks down complex topics into simple, practical advice for delivering an outstanding experience. I have read and referred this book for years and will continue to do so.”

BRIAN KLAJA

Regional Manager, WFM, Netflix

“If you had to pick one resource for establishing, growing, and developing a high-performing contact center, this is it! I wouldn’t want to lead a contact center without it!”

BETH GAUTHIER-JENKIN

Vice President, Sales and Customer Care, Gopher Sport

“Brad Cleveland takes you beyond technology and processes to the crux of the challenge, making your staff successful in a manner that boosts customer loyalty and enhances positive word-of-mouth.”

JOHN GOODMAN

Vice Chairman, Customer Care Measurement & Consulting

What Readers Have Said About Previous Editions

(Names and titles are as they appeared at the time.)

“This book is an excellent resource on how you can build a framework to remain dynamic, ensure long-term success, and deliver a consistent customer experience. A must-read for all levels of contact center management.”

GLENN GEMMILL

Vice President, Customer Care Center, Coca-Cola Refreshments

“You will be able to re-read this book several times as your centre evolves, each time learning new methods and tips...”

DEAN YARDLEY

Strategic Innovations Manager, British Airways

“This is the ‘go-to’ reference for all contact center professionals! If you want to stay on the cutting edge and further develop your customer experience strategy, this book is your ‘must-read.’”

MARY ANN C. MONROE

Director, Contact Center Services, Federal Citizen Information Center, Office of Citizen Services, U.S. General Services Administration

“Brad Cleveland writes as he speaks at conferences—engagingly and with passion about the global contact center industry.”

MICHAEL STOCK

Head of Business and Partnerships, Marketing Communications and Audiences, BBC

“In this new version of our industry’s best-selling book, Brad Cleveland provides insightful knowledge into contact center operations...I strongly recommend it.”

KJ CHEONG

President, CIRC Korea

“Get it! Read it! Highlight it! Keep it on top of your desk! Read it again and again and again!”

Share the knowledge with everyone who needs to understand and value the contact center as the 'front door to the customer.'"

PHYLLIS BATSON

Vice President, Customer Contact, Exelon Energy Delivery Company

"This book is a classic. It's a must-read for professionals who wish to improve their service quality, achieve process efficiency and reduce operational cost."

LI JIAN

Director, Customer Service, Bank of China

"This book provides clear, easy-to-understand insight into a complex subject."

MALLIKARJUNA RAO

Assistant Vice President, Service Delivery, Idea Cellular Ltd., India

"This is an outstanding book that provides the necessary tools for managers to effectively manage their day-to-day operations and understand the strategy behind the tasks ..."

JEAN A. KOSTELANSKY

Director, Physician Services, Northwestern Memorial Hospital

"A must-have for any operations and contact center leader. This book leads the way for brands to benefit in a constantly changing world that requires reinvention to succeed with your customers."

JOSE VASQUEZ-MENDEZ

Vice President, Customer Service United Kingdom, American Express

"This book provides current customer management strategies that capture the essence of effectively serving today's more discerning and ever more demanding customer!"

DOMINICK KEENAGHAN

President, INSIGHTS, Dubai

This book is dedicated to Kirsten and Grace.

Acknowledgements

So many have contributed to my understanding of contact centers and customer experience, and to the contents of this book. I am grateful beyond what words can adequately convey.

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A big thank you to Tara Gibb and the entire ICMI team for encouraging and supporting this project! It's been an honor to work alongside each of you, and to serve ICMI's amazing community of customer service leaders.

Michael Blair, who designed the first edition of the book over two decades ago, once again provided his talents to this project. Eric Beckman produced the beautiful graphics, the cover, and lent his eye for design to the look and feel of the book. Nate Brown provided the cover photo. Megan Selva managed the project, kept us on track, and provided an eagle-eye review. And a big thank you to Maria Canfield for helping with editing, and to our proofer extraordinaire (and someone I rely on often), David Levy.

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Gordon MacPherson, Jr.—my friend, founder of ICMI, and business partner in the early days of the company—has been enjoying retirement. If you see something in the book that really makes sense, Gordon probably came up with it years ago.

I'd like to extend a special thanks to my parents, Doug and Annie Cleveland, for their ongoing encouragement. My father was instrumental in developing my early interest in communications.

Most of all, I want to thank my wife Kirsten and daughter Grace. You make it all worthwhile and I love you both!

Warm Regards,

Brad

Foreword

Contact Center Management on Fast Forward is a clear voice with an unconfusing message: to successfully lead and manage, you need a good understanding of today's unique contact center environment and an effective strategy and management framework. This book outlines principles that you can use and trust.

The truly wise understand that rapid and lasting learning comes from choosing well your instructors and texts. The best will not waste your time or go off on tangents. They will present information in a way that makes it easy to learn and retain.

So...you must be truly wise because you have this book in your hands. Brad Cleveland has made a career of learning everything vital to customer experience and presenting it with sparkle and conviction. He has paid the price in time, effort and miles to know what's really happening, and he is the acknowledged leader in this field.

Brad and the ICMI team have put together a book that belongs on the shelf of every contact center manager—as well as every senior-level executive responsible for customer experiences. Turn the page now for the good stuff. You'll see what I mean!

Gordon F. MacPherson, Jr.

Mount Dora, Florida

August 2019

Gordon MacPherson, Jr. launched the first publications, events, and educational programs for contact center managers. His formative work helped to shape many of the terms and practices in use worldwide today. Gordon was founder and first president of ICMI (now part of

Informa PLC). He is now enjoying retirement and is an accomplished writer and photographer.

Introduction

In my work over the years, it's been a privilege to sit next to hundreds of customer service agents, across many industries, as they've made customer connections in the course of their daily work.

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. (I mention these examples in Chapter 1.)

It's really quite amazing. When it's set up well, we as customers can—right now— reach someone who cares and who has the expertise and resources to help.

It's been almost 25 years since the first edition of this book was introduced. The response surpassed our highest expectations, and we were excited and grateful to see the book reach so many corners of the world. The book, now in its fourth edition, has evolved significantly since that first edition. Social media, smartphones, artificial intelligence (AI), new mobile- and Internet-based services—to name just a few of the developments in the years since—have changed the game. And yet, for all the exciting developments, I'm a bit surprised at how little the core management principles have changed.

So...if you've read any of the first three editions, you'll see some things that are familiar.

This was an extensive update and rewrite, but we didn't try to change the unchangeable—the principles that are tried and true. You can trust the continuity in those core areas that will never change. You'll also find much that's new: managing omnichannel, new sections on customer access strategies, empowering employees, using metrics, customer advocacy, the impact of AI, and (above all) the strategic role of contact centers.

My career began underneath contact centers. One of my first jobs was with an interconnect company that supplied telecommunications and data systems. I was the lowest-ranking person on the team, and my primary responsibility was to install cabling. This was often underneath floors, through tight, dark spaces with spider webs, scalding hot utility pipes, and creatures that would scurry just out of flashlight range.

There's a popular expression of starting one's career on the "ground floor." Much of the time, I just wanted to get back up to the ground floor! But I had some great mentors and, with their help and encouragement, began to get excited about the communications era and how it's rapidly changing our world.

I sometimes think back to those days underneath office floors, and consider what's happened in the realm of customer communications since then. I've seen the amazing work that you and your teams have done over the years. And there's a great deal more ahead; customer interaction will be a powerful force in shaping our future.

I hope you find this book helpful. It's a privilege to have you spend time with it, and I'm excited to be on this journey with you!

Brad Cleveland
San Diego, California