



Moving Beyond the Queue

Focusing on the real-time customer

CooneySolutionsGroup.com

877-720-9824

Moving Beyond the Queue

Focusing on the real-time customer

Customers are in control of business today, and contact 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 web sites that enable customers to easily express and share on a grand scale their 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 today need to establish a culture of customer-centricity, where everyone in the organization understands and embraces the value of great service. This is no small feat. Being truly customer-centric includes taking the customer's perspective into consideration when determining real-time service expectations, and the realization that customers are a new marketing vehicle.

“Be afraid of customers...”

Jeff Bezos
Amazon's CEO

The shift to customer control is so pronounced that many companies now focus less on C-sat survey success and more on critical real-time indicators, such as the already alluded to customer blogs, web sites, discussion forums, etc. In doing so, forward-thinking companies are connecting their processes with the ever-changing expectations of those they serve. Gone are the days when a 95% C-sat rate was something to brag about; in fact, if you're an eBay seller, anything below a 98% C-sat rating will push people away.

We've entered an era where consumers expect multimillion dollar companies 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 organizations contact centers to get everyone in the contact 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 a competitive advantage with every interaction.

What follows are ways the contact center can refocus on the new “real-time” customer, capture invaluable information on what's really happening to the business, and position the center as the key success driver in the new era of customer controlled contact center.

Five Attributes of the Best “Real-Time Customer” Contact Centers

1) They are proactive in providing resolutions – no complaint required

Let's face it, most customer contacts are not generated by a customer who simply wants to commend you for providing a wonderful product or service. The contact center is generally the place the customer looks to for issue or problem resolution. The best contact centers are finding new ways to get out in front of these issues and problems – using real-time information to generate proactive resolutions.

We've all experienced 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. Most of the time, scores of other people have already done the same – the IVR recording tells us so.

What can we learn from the utility company contact centers involved in such scenarios? When you see issues emerging from a certain customer segment, do something in advance to stem the tide. 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

Most managers will tell you that happier employees provide better service, yet few take action to generate the level of agent engagement required to drive real C-sat improvement. Instead, most spend their time trying to increase C-sat scores by increasing agent efficiency. 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 agent position contact center isn't the most glamorous or desired job in the company. High agent attrition rates industry-wide attest to this. Most agents take the job to “do their time” before moving to other areas within the enterprise.

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, and you'll likely find that what they want isn't that difficult to provide contact center. They'd love to come to work and have some expectation of their daily workload; they'd love to be given the tools and training they need to be successful; and they'd love to have more flexibility. All this can be accomplished by moving from managing the queues to managing the process. Every contact center can do this, but most make it a lot harder than it has to be.

“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
CEO Zappos.com

“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

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 contact center agents have several “wins” every day that should be recognized, discussed 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.

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. Agents will 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 contact centers pay 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 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. Top center act on these findings, not only contacting highly dissatisfied customers directly and fighting for their loyalty, but also tracking common trends in customer sentiment and working to continually improve services.

Leading contact centers don’t just wait around from customers to express themselves; they actively solicit customer feedback and desires. One of the best ways to do this is via a post-contact survey that includes the following three-questions: 1. What did you like about the last interaction; 2. What didn’t you like; 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 contact centers is not investing in the growth of leaders. Cen-

ters do a significant amount of internal promotion – moving agents into supervisory or managerial positions, but few contact centers have the luxury of formal one-on-one development or mentoring programs to grow new supervisors. Most contact centers find themselves at the lower end of the maturity model -- few people in the organization with a formal understanding of the foundational requirements of contact 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 contact 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 contact 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 onboarding 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 – 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 Contact center

Don't just measure – create action.

The majority of contact centers are very metrics-oriented – measuring everything because they can. Metrics reporting is one of the fastest growing segments of the contact center technology industry. Many times we overload agents and leaders with numbers to the point that no one really knows where they are or what to improve. Contact 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 finding 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 contact 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 contact 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 satisfaction/loyalty, employee delight, operational efficiencies and sales growth. In other words, FCR hits both the top and bottom line. Some companies struggle with FCR measurement because they say it's hard to get the real numbers. Not so -- all you need to do is ask your customers who have called if their issue has been fully resolved. This can be done via post-contact IVR surveys, email surveys and/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 poorly 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 contact 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 contact centers can generate additional revenue, but not without getting the foundational things right. Many companies have invested heavily in agent sales training, 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 managers know that the real value of the contact center is in every interaction. After each call, have agents 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 contact center. Your customers are telling you what they really want -- this happens 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

Even in a contact center that has done a solid job of forecasting and scheduling, there will almost always be a portion of the center's agents "sitting around" waiting for calls to arrive. 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 with a customer. 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 contact 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, such as the customer calling the center regarding their online order, 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.

*"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

How to Make Others Want to Move Forward

"Senior management just doesn't understand." That's a complaint heard time and again from contact 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 contact 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 contact center management.

The truth is that many senior executives with contact center responsibilities have never run a contact 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

You need to be on top of your game in order to get senior management on board. Make sure that you are able to intelligently describe the tactical stuff, and make the connection between the contact center and the value it brings to the company. To get buy-in from others, you have to become a student of contact 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 contact centers is accurate and current. Attend conferences, seminars and training courses that focus on the basics of contact 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 a lot 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 periodicals that are not exactly contact center-related. 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 contact center environment. You can use your boss' favorite book as a point of reference the next time you have an opportunity to “talk contact centers” with your boss.

Once you get senior management onboard, everything else becomes easy. Keep focusing on the value of the contact 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 contact center – the key is to never give up and to help everyone view things from the customer's perspective. The best contact centers know that you'll never grow until every agent and senior manager 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.

Appendix

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

Every contact 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 contact 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% of calls answered in zero seconds, you're planning to allow a certain number of calls to 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 contact 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.

Lastly -- and most importantly -- your plan must be updated with the last-minute changes (e.g., sick leave, broken-down cars, sick children, etc.) first thing in the morning. 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

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, 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 contact center agents have moved from solely handling calls to managing chat sessions, email interactions and other contact types. In some cases, the workload at these centers has shifted to handling only the new media. Consequently, 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 contact 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 contact centers evolve and establish service level objectives, rewards and punishments based on these objectives quickly follow. To ensure these objectives are consistently met, many contact centers "attack the queue" to meet service level. 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 the "attack the queue" mindset is not an easy task. You must have buy-in from the top of the organization. This requires educating everyone who influences the contact center's results – from frontline

agents to senior executives. Don't worry, you don't have to train everyone to be a contact center expert; a simple presentation that outlines what it means to work in a contact center is a good way to get the ball rolling. Before the presentation, though, 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 contact centers become much easier.

About the Author

Tim Montgomery is CEO of **Cooney Solutions Group**. Tim is an accomplished author and has written numerous insightful and forward-thinking articles and whitepapers on a wide range of leadership/management, customer service, and contact center topics. His work has been featured in many global publications, industry journals and position papers. He is also a contributing author to highly regarded books on Leadership and Business Management, Customer Relationship Management, Call Center Operations Management and People Management.

Tim has personally assisted some of the world's most recognized service organizations – **USAA, DELL, AIG, Lifetouch Publishing, ADP, Mitsubishi Motors, The Scooter Store, Farmers Insurance, Premiera Blue Cross, Deluxe Corporation, Allstate, Kodak, Liberty Mutual, Cinergy, Prudential, Meguiar's, Coca-Cola, Isagenix, Department of Veterans Affairs, AAA of Canada, American Family Insurance, The Gartner Group, Amerigroup, Prime Therapeutics, Erie Insurance, Harvard Medical School, and many more.**

About Cooney Solutions Group

General Bill Cooney and Tim Montgomery, two of the most experienced and respected experts in customer service and contact center management, founded CSG with the goal of offering affordable, world-class outsourcing solutions to organizations committed to delivering high-quality, customer experiences. They are further supported by a team of recognized experts in the areas of network utilization, operational efficiency and culture development. This "dream team" has served as advisors to some of the world's most recognized and celebrated customer care organizations.

For more information, please visit www.cooneysolutionsgroup.com.