

# Call Center Process

This is a process narrative for Mandel Inc., that has 2 divisions, and operates a Call Centre for providing technical support, providing Sales and Marketing knowledge, and taking Customer Orders. One of the divisions has been operating for years; the other is starting operation as of this month.

## 1. Receptionist:

Answers the phone, and determines, as quickly as possible, the following needs of the caller:

- Hot Tubs or Mandel Inc. Appliances
- Does the caller have a Case Number? If so, then to the Escalated Service ( Advanced Support or Support Expert ) , or a technician, if an Escalated Service person is not available.
- Technical Support, or Customer Service?
- Specific extension / person requested

The Receptionist is able to do this, now that Hot Tubs is part of the duties, in less than 30 seconds for an experienced caller, and between 30 seconds and 2 minutes for a first time caller. The challenge is determining the need of the caller, without listening to the entire story. When the decision is made, the Receptionist puts the caller into the appropriate queue.

The Receptionists also monitor the single “external caller” voice mail box on a regular basis. They listen as quickly as possible to each message, and then route it to the appropriate internal voice mail box (Hot Tubs support, Appliances support, Hot Tubs Customer Service or Appliances Customer Service).

## 2. Mandel Inc. Appliances Support Tech

After answering the call, the tech determines if this is a new caller, or a repeating caller, and gets a company and personal name. From the CRM, they locate the company and person, or set up the new contact record. They also determine if this is a first call for this issue for the caller. Then, the tech starts hearing the caller’s story / issues. After getting the general scope, the tech finds the appropriate book or manual on their screen, or draws from their experience, to ask more detailed questions. Notes are taken during the call, if appropriate. It is important to clarify and confirm the caller’s perceptions and communications. Since 2010, about 81% of the time, the Mandel Inc. Appliances Support Tech role is able to answer the caller’s question(s). This process takes 1.8 minutes, on average.

When call is done, the Support Tech finalizes any contact notes, then goes ready for another call. If the caller is unsatisfied, but doesn’t want escalated service, then that is noted as well. Finalizing contact notes takes usually 1.5 minutes.

If caller needs escalated service, or wants to return or refund, or order more product, then the Appliances Support Tech puts the caller into the appropriate queue, finalizes any contact notes,

then goes ready for another call. If escalated service is needed, the Support Tech also opens a new Case in the CRM, and links the notes as needed.

The CRM has a large Comments window (freeform RichText, like a Word Processing page that you don't need to save as a separate file) available for each contact name in the system. Support notes, specific to a "case", are kept in that window for the customer. Each note starts with the date and time, and the name of the person writing the note. To make things seem official, a number is created from the current date and time (ie Dec 8, 2017 at 12 noon would be 171208-1200). This is the Case Number given to the caller, if needed.

If the caller has a case number, then the Support Tech will find the case notes in the CRM, and review them quickly to see if an answer can be communicated. If an answer is there, then the Appliances Support Tech gives the answer, and then discusses to see if the issue is solved. If the issue is not solved, then the caller is put into the queue for escalated service, and the Appliances Support Tech finalizes any contact notes, then goes ready for another call.

### 3. Mandel Inc. Appliances Support Expert

After answering the call, the Appliances Support Expert gets a company and personal name, or a case number. From the CRM, they locate the company and person. They read the notes, while having a general conversation with the caller. Then, the Support Expert starts hearing the caller's story / issues. After getting the general scope, the Support Expert finds the appropriate book or manual on their screen, or draws from their experience, to ask more detailed questions. Notes are taken during the call, if appropriate. It is important to clarify and confirm the caller's perceptions and communications. Since 2010, about 96% of the time, the Mandel Inc. Appliances Support Expert role is able to answer the caller's question(s). This process takes 4.5 minutes, on average.

If the caller has a case number, then the Support Expert will find the case notes in the CRM, and review them quickly to see if an answer can be communicated. If an answer is there, then the Support Expert gives the answer, and then discusses to see if the issue is solved. If the issue is not solved, then the Support Expert continues troubleshooting. Time for this activity is widely variable.

When call is done, the Appliances Support Expert finalizes any contact notes, then goes ready for another call. If the caller is unsatisfied, then that is noted as well. Finalizing contact notes takes usually 2.5 minutes, because there often is a need to close cases, and communicate with other Mandel Inc. staff.

If caller wants to return or refund, or order more product, then the Appliances Support Expert puts the caller into the appropriate queue, finalizes any contact notes, then goes ready for another call.

The Appliances Support Expert also monitor the Appliances Support voice mail box on a regular basis. They then respond as appropriate to the message, following company policies.

#### 4. Mandel Inc. Appliances Sales / Marketing / Customer Service (Inside Sales)

After answering the call, the Appliances Inside Sales gets a personal name. They determine if the caller wants to place an order, follow up on an order, or have a marketing conversation about products and services. For a marketing conversation, reference material is consulted if needed. If the customer is satisfied with the verbal info, then the call is finished, on average in about 95 seconds. The Inside Sales makes a quick note (taking 22 seconds) on an informal tracking spreadsheet. These calls are few, because the Mandel Inc. Marketing staff do most of the sales work for Appliances sales.

The Appliances Inside Sales may have to spend 1-3 minutes e-mailing out information as well, then goes ready for another call.

If an order must be amended or cancelled, then the Inside Sales turns to the corporate Order Management system, and does what is needed. This is, on average, a 7 minute process, but can vary from 3 to 11 minutes.

If a new order is being placed, then the Inside Sales turns to the corporate Order Management system, and does what is needed. This is, on average, a 2.7 minute process, as most sales of this type are for consumables for the Appliances Equipment. The Shipping / Receiving department will get the notifications that they need from the corporate Order Mngt system.

For either action, the Appliances Inside Sales makes a quick note (taking 22 seconds) on an informal tracking spreadsheet. The Appliances Inside Sales may have to spend 1-3 minutes e-mailing out information as well (this happens about 20% of the time), then goes ready for another call.

#### 5. Mandel Inc. Manager (Refunds / Returns)

The Manager divides their time between supervising the call centre operations (85%) and handling Refunds / Returns (15%). Like everyone else, after answering the call, the manager gets a company and personal name. From the CRM, they locate the company and person. From the corporate Order Mngt System, they also locate the company's active orders. Notes are taken during the call, if appropriate. It is important to clarify and confirm the caller's perceptions and communications. The appropriate actions are taken in the Order Mngt System.

When call is done, the Appliances Manager finalizes any contact notes, then returns to their work. If the caller is unsatisfied, then that is noted as well. Finalizing contact notes takes usually 2.5 minutes, because there often is a need to communicate with other Mandel Inc. staff.

The Manager also monitors the Appliances Support voice mail box on a regular basis. They then respond as appropriate to the message, following company policies and procedures.

#### 6. Hot Tubs Technical Support

After answering the call, the tech determines if this is a new caller, or a repeating caller, and gets a company and personal name. From the CRM, they locate the company and person, or set up the new contact record. They also determine if this is a first call for this issue for the caller. Then, the tech starts hearing the caller's story / issues. After getting the general scope, the tech finds the appropriate book or manual on their screen, or draws from their experience, to ask more detailed questions. Notes are taken during the call, if appropriate. It is important to clarify and confirm the caller's perceptions and communications. Since early 2017 (the training period for the division startup), about 63% of the time, the Hot Tubs Technical Support is able to answer the caller's question(s). This process takes 5.5 minutes, on average.

When call is done, the Hot Tubs Technical Support finalizes any contact notes, then goes ready for another call. If the caller is unsatisfied, but doesn't want escalated service, then that is noted as well. Finalizing contact notes should take about 1.5 minutes.

If caller needs escalated service, or wants to return or refund, or order more product, then the Hot Tubs Technical Support puts the caller into the appropriate queue, finalizes any contact notes, then goes ready for another call. If escalated service is needed, the tech also opens a new Case in the CRM, and links the notes as needed.

The CRM has a large Comments window (freeform RichText, like a Word Processing page that you don't need to save as a separate file) available for each contact name in the system. Support notes, specific to a "case", are kept in that window for the customer. Each note starts with the date and time, and the name of the person writing the note. To make things seem official, a number is created from the current date and time (ie Dec 8, 2017 at 12 noon would be 171208-1200 ). This is the Case Number given to the caller, if needed.

If the caller has a case number, then the Technical Support will find the case notes in the CRM, and review them quickly to see if an answer can be communicated. If an answer is there, then the Technical Support gives the answer, and then discusses to see if the issue is solved. If the issue is not solved, then the caller is put into the queue for escalated service, and the Hot Tubs Technical Support finalizes any contact notes, then goes ready for another call.

## 7. Hot Tubs Advanced Support

After answering the call, the Hot Tubs Advanced Support gets a company and personal name, or a case number. From the CRM, they locate the company and person. They read the notes, while having a general conversation with the caller. Then, the <Expert> starts hearing the caller's story / issues. After getting the general scope, the <Expert> finds the appropriate book or manual on their screen, or draws from their experience, to ask more detailed questions. Notes are taken during the call, if appropriate. It is important to clarify and confirm the caller's perceptions and communications. Since early 2017 (the training period for the division startup), about 84% of the time, the Advanced Support is able to answer the caller's question(s). This process takes 9.3 minutes, on average.

If the caller has a case number, then the Advanced Support will find the case notes in the CRM, and review them quickly to see if an answer can be communicated. If an answer is there, then the Advanced Support gives the answer, and then discusses to see if the issue is solved. If the issue is not solved, then the Hot Tubs Advanced Support continues troubleshooting. Time for this activity is widely variable.

When call is done, the Hot Tubs Advanced Support finalizes any contact notes, then goes ready for another call. If the caller is unsatisfied (expected to be about 11% of the calls), then that is noted as well. Finalizing contact notes is projected to take 2.5 minutes, because there often is a need to close cases, and communicate with other Mandel Inc. staff.

If caller wants to return or refund, or order more product, then the Hot Tubs Advanced Support puts the caller into the appropriate queue, finalizes any contact notes, then goes ready for another call.

The <Expert> also monitor the Hot Tubs Support voice mail box on a regular basis. They then respond as appropriate to the message, following company policies.

#### 8. Hot Tubs Sales / Marketing / Customer Service (Marketer)

After answering the call, the Marketer gets a personal name. They determine if the caller wants to place and order, follow up on an order, or have a marketing conversation about products and services. For a marketing conversation, reference material is consulted if needed. If the customer is satisfied with the verbal info, then the call is finished, on average in about 3.7 minutes. The Marketer makes a quick note (taking 22 seconds) on an informal tracking spreadsheet. In 2017, there is no definite time duration data on this activity, because the division is just starting up.

It is expected that the Marketer may have to spent 1-3 minutes e-mailing out information as well, then get ready for another call.

If an order must be amended or cancelled, then the Marketer turns to the corporate Order Management system, and does what is needed. This is, on average from the training period, a 7 minute process, but can vary from 3 to 11 minutes.

If a new order is being placed, then the Marketer turns to the corporate Order Management system, and does what is needed. This is, on average, a 2.7 minute process. The Shipping / Receiving department will get the notifications that they need from the corporate Order Mngt system.

For either action, the Marketer makes a quick note (22 seconds on average is allotted for this) on an informal tracking spreadsheet. Again, it is expected that the Marketer may have to spent 1-3 minutes e-mailing out information as well (this happens about 20% of the time), then get ready for another call.

#### 9. Team Lead (Refunds / Returns)

The Team Lead manager divides their time between supervising the call centre operations (45%) and handling Refunds / Returns (55%). Like everyone else, after answering the call, the Team Lead gets a company and personal name. From the CRM, they locate the company and person. From the corporate Order Mngt System, they also locate the company's active orders. Notes are taken during the call, if appropriate. It is important to clarify and confirm the caller's perceptions and communications. The appropriate actions are taken in the Order Mngt System. The average time for a return or refund is projected to be 5.5 minutes.

When call is done, the Team Lead finalizes any contact notes, then returns to their work. If the caller is unsatisfied, then that is noted as well. Finalizing contact notes should take about 2.5 minutes, because there often is a need to communicate with other Mandel Inc. staff.

The Manager also monitors the Hot Tubs Support voice mail box on a regular basis. They then respond as appropriate to the message, following company policies and procedures.

#### 10. IT Support staff

There is always a technology support person available to the Call Centre operations, since the staffing expansion in January 2017. They deal with hardware, network and software issues as needed. During the two 8 hour shifts per day, 5 days a week, and 1 shift on Saturday, the network is up 99.5% of the time (over one year). The PBX has the same uptime percentage. Two empty work stations are kept, so that, if a computer fails, the staff person just moves to another station. The corporate Order Management System has been struggling a bit in 2015, and is up about 97% of the time. The CRM is up 98.3% of the time.

#### 11. Important notes

The Hold queues in the PBX have different listening content. Waiting for service? Listen to gentle advertising. Waiting for escalated service? Relaxing Music. Waiting for Marketing? Stronger advertising. Waiting for a Refund / return? Calming Music, with voiceovers with re-assuring messages.

The IT tech is responsible for monitoring the Hold Queues' audio content.