ACHIEVE YOUR STRATEGIC GOALS THROUGH A CALL CENTER ASSESSMENT

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CREATING THE UNCOMMON CALL CENTER

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Abstract

All successful businesses must learn to balance short-term needs with long-term objectives. But in the fast-paced environment of a customer contact center, this is often easier said than done. Changes occur so frequently that processes become splintered. It becomes difficult to pinpoint where the tactical side of the operation is contributing to, or deterring from, the achievement of strategic goals.

This article explains how a contact center assessment can bridge this critical gap. It walks you step-by-step through the four assessment phases—preparation, implementation, analysis, and closure—describing the tasks and outcomes that are critical to each. You will learn how to structure and conduct assessments that align your tactical operations with your strategic objectives.

Achieve Your Strategic Goals through a Call Center Assessment

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"The significant problems we face cannot be solved by the same level of thinking that created them."

- Albert Einstein

According to Einstein we have a better chance of solving our problem if we attack it with a different level of thinking than the level of thinking that created it.

So how does this relate to contact center management? In the contact center there are two very distinct levels of thinking. The first level of thinking is "urgent thinking" and the second is "important thinking." One is not better than the other - both are necessary. Contact center managers need to balance urgent and important thinking. But, the problem that Einstein points out is that most of us get stuck in one level of thinking. And, unfortunately in the contact center that level happens to be "urgent."

Urgent Thinking

Let me give you an example. In a previous article I described the job of managing a contact center this way:

Think of a big swimming pool. Imagine this is the contact center environment. Now imagine 1,000 ping-pong balls floating in this big swimming pool. These ping-pong balls represent all the details you must control each moment of the day to operate a successful contact center. Your daily job, as the contact center manager, is to hold all 1,000 ping-pong balls under water, all at the same time, all day long. And, if that isn't bad enough, let's throw in some hurricane force winds (those constant unexpected events throughout your day that make the difficult even more impossible).

Urgent thinking is required if a manager wants to keep all those ping-pong balls under water all at the same time, all day long. With "urgent thinking" the urgent (or tactical) solution to managing all those ping-pong balls takes precedence over the important (or strategic) solution. Let's say some unforeseen event happens and your service level starts to degrade. No contact center manager in his or her right mind is going to call an eight-hour strategy session to fix the problem. To recover your service level right now you need to apply urgent thinking.

The problem with prolonged urgent thinking is that you end up with a haphazard approach to assessment and problem solving. This haphazard approach leads to a predominance of urgent (i.e., tactical or short term) solutions. With urgent thinking you are, by necessity, looking for THE quick solution and THE answer to your urgent need. Urgent thinking does not allow much, if any, time for root cause analysis. Therefore, if urgent thinking is the only staple in your thinking diet, you can quickly clog all your contact center arteries with more problems. Urgent solutions typically deal only with the symptom of a problem and not the root cause.

Important Thinking

That's why, according to Einstein, we need to apply a different level of thinking to solve our significant or prolonged problems. I propose we need to start thinking more "importantly."

Important thinking allows you to step back and evaluate the root cause of your problems. It gives you time to look at the organization as a whole and focus on fixing the whole problem (not just part of it). Important thinking is proactive and has structure (unlike urgent thinking that is reactive with little structure).

Important thinking can take many forms – strategy sessions, planning meetings, and one of the most successful (which just happens to be the topic of the rest of this article) - contact center assessments.

How to Think Importantly

One good way to ensure that you don't get stuck in urgent thinking is to schedule a periodic contact center assessment. Assessments are a great way to think importantly. Assessments allow you to take a strategic look at everything in your organization that impacts your customer and your bottom line.

There is one caution with assessments. When implementing an assessment, don't confuse important thinking with important doing. An assessment is important thinking. It tells you **what** should be improved. After the assessment is done then you can start important doing. Important doing is figuring out **how** to improve and then improving. If you confuse important thinking with important doing you won't get as much benefit from your thinking investment.

What to think importantly about
When thinking importantly, you can choose to assess any area of the contact center. The goal is to pick a balance of topics (not all technology, not all people, not all process, etc.). It is also important to pick areas that you think have improvement opportunities. We've seen some managers pick areas they knew were in good shape. They wanted to make sure they didn't "get nailed" for anything "negative." Remember assessments are about continual improvement, not about blame.

Topics you may want to think importantly about are:
- Policies, processes and procedures
- Performance standards and goals
- Morale and employee relations
- Quality
- Responsibilities
- Creativity and innovation
- Training and development
- Personnel policies
- Communication
- Objectives and plans
- Recruitment
- Finance
- Compensation
- Motivation and incentives
- Safety and welfare
- Cost reduction and containment
- Information systems
- Sales and marketing
- Management reporting
- Telecommunications technology
- Market research and analysis

- Staffing
- Distribution
- Purchasing
- Maintenance
- Structure and organization
- Services and facilities
- Telecommunications Network
- Fulfillment
- Customer access channels
- Customer and employee satisfaction
- Interdepartmental linkages
- Virtual site management
- Metrics and performance standards

Choosing Your Contact Center Assessment Team

Obviously, one of the biggest success factors of important thinking is the assessment team's ability to accurately assess the current state of the contact center, understand the ultimate performance goal, measure the performance gap and recommend appropriate actions for improvement.

Some of the most important competencies to look for when selecting your team are:

- The ability to recognize when something needs to be improved. This may sound obvious, but if the team looks at a situation and thinks everything is fine, when if fact, the process is in shambles you will have a real tough time improving. This competency comes from experience in the contact center industry, experience in multiple contact centers (seeing how other contact centers do things), benchmarking experience and good old basic contact center research.

- The ability to diagnose the root cause of problems. Finding a problem is one thing. Knowing how to fix it is another. Without the skill of root cause analysis you can waste valuable resources by proposing the wrong solution.

- The ability to see patterns and recognize the patterns for what they are. We call this "walking into the hologram." Assessors have to have a 3D approach to the assessment process. You are constantly looking for multiple confirmations that a problem exists. When you do an assessment you will hear and see the same problem in multiple ways. The team's eyes and ears have to be tuned to picking up on these clues and translating them to patterns and finally to recommendations.

- The willingness to invest the time to define and calibrate to the same definition of excellence. If assessors evaluate excellence using different definitions they will never get a consistent read on the contact center's performance.

Process Overview

A contact center assessment relies on four phases:

1. Preparation
2. Implementation
3. Analysis
4. Closure

1. Preparation
You will spend almost as much time preparing for the assessment as you will implementing it. It's important not to skimp here. During the preparation phase, the contact center assessment team will:

- Determine the scope of the assessment: Contact center assessments may be implemented one topic at a time or all topics may be tackled at once. The scope of the assessment determines what assets (time, people) are needed to accomplish the objectives.

- Develop an assessment project plan: This plan ensures that your team knows tasks, responsibilities and due dates.

- Familiarize yourself: Once the scope of the assessment is determined, you will need to become familiar with the area(s) to be assessed. Many times this includes reviewing documentation and gathering preliminary data. During this familiarization, make notes on what you need to see during the assessment and what questions you might ask. The notes can be used to help you develop a checklist of what you will look at and what you will look for. You may want to follow the steps below.

  – Gather and review documentation: The contact center assessment team acquires the necessary documentation for review. The specific documentation is determined by the scope of the assessment – training manuals, procedure manuals, employee handbooks, etc.

  – Develop and implement a questionnaire to solicit employee input: The use of a questionnaire in the preparation phase helps the team identify "hot spots" before they start the implementation phase. This saves times and energy for the team. It gives them focus for the interviews and observation.

  – Develop a company background: This sheet is used to gather company data that shapes the focus of the contact center assessment. By collecting company data prior to the implementation, the team can begin to develop some hypotheses to "test" during implementation. For example, your company background may include questions on metrics and standards. It could include components about your recruiting and hiring practices. It could include questions about leadership, mission, vision or values. This background sheet is tailored to the scope of your assessment. It gives you a track to follow as you gather specific data for analysis (prior to starting your interviews, observations, document review, etc.).

  – Complete the company background: Once you have all the questions designed for your company background, you'll either ask others to answer the questions or else you'll go "ferreting" to find the data so you can "fill in the blanks."

- Develop the evaluation tool: The use of a standard evaluation tool helps your team stay calibrated to a specified standard of excellence. This evaluation tool should define the scoring mechanism for your team. If your team is not calibrated then your recommendations are not defensible.

- Assign weights to each topic and question on your evaluation sheets: The leadership team should get together at this point in the assessment to determine what the relative priorities are for each area being evaluated. The assigned weights help determine the relative importance of each item. These weights drive the prioritization of improvement opportunities.

- Prepare the implementation schedule: Since many people are involved in the implementation (both those on the contact center assessment team and those involved in management and operations), a schedule helps keep the assessment on track.

- Distribute a preparation letter to appropriate personnel: The preparation letter informs those involved about the critical nature of contact center assessment, involves them in the process and requests vital information. It also alerts people to the time you are requesting to schedule interviews, focus groups and observation.

2. Implementation
During the assessment, remember that you are the assessor and you need to control the time, the interviews and "the sample." You can select the people with whom you speak, the documentation you look at and how much time you spend. You must also remain objective. Don't try to solve problems during the assessment. This will take time away from the activities of the assessment and will detract from its effectiveness. It is highly likely that people will want to hear your preliminary recommendations and solutions during the assessment. Don't give in to this temptation.

Remember that it is the entire management team's responsibility to ensure that the corrective action is performed, implemented and effective – after the assessment report is delivered. Don't make it your responsibility during the assessment by telling people how to do things.

During the implementation phase the contact center assessment team will:

- Coordinate and chair kick-off and daily update meetings: The kick-off meetings are to ensure full cooperation from everyone involved in the process. The daily update meetings are used to review the daily findings and discoveries, ask for assistance in obtaining information and request help in overcoming any barriers encountered.

- Perform interviews: The contact center assessment team will interview employees and possibly customers to gain insights. During the interviewing be aware of your body language and the interviewee's body language. You are not there to judge – you are there to discover continual improvement opportunities. Be sensitive to the interviewee – especially if they act threatened or anxious (which is highly likely in an assessment). Back off, rephrase the question or ask another question.

- Observe processes, events and people: The observation phase can include diagramming and flowcharting processes to determine if actual processes conform to the documentation and to evaluate if they are effective and efficient. Calls are monitored to evaluate quality. Team members evaluate the effectiveness of meetings and get a general awareness of the environment of the workplace. Half of the information you will obtain in an assessment comes from what you hear – the other half from what you see.

- Evaluate the documentation: The contact center assessment team reviews the documentation to determine if the level of documentation allows for consistent and controllable quality.

- Fill out and review assessment finding sheets and logs: Each finding and discovery is recorded on a daily basis. After a grueling day of interviews and observation it is tempting to say, "I'll document today's discoveries later." Don't wait. Believe me, you will never remember all the details if you don't document immediately. Be sure to give yourself time at the end of the day to wrap up the day's activities. The contact center assessment team reviews these findings and discoveries daily. They are used to continually fine-tune the focus of the assessment and are the basis for the analysis phase of the assessment.

3. Analysis
The analysis phase of contact center assessments is used to distill all the data gathered in the preparation and implementation phases into recommendations that will help the company achieve excellence.

Once the company specific data is unearthed in the implementation stage, the team compares the company's performance to the company's goals and industry benchmarks. From this comparison, the team defines the performance gap.

The team then brainstorms what should be done to close the gap. This brainstorming results in the assessment recommendations. Since it is not uncommon for an assessment to result in dozens of recommendations and since few companies have the resources to attack them all, the assessment team must prioritize their recommendations before presentation to the leadership team.

4. Closure
The closure phase is used for the assessment team to prepare and deliver a written summation of the contact center assessment's preparation, implementation and analysis. The team's final act is to ensure there is follow through on the contact center assessment recommendations.

In the closure stage the contact center assessment team will:

- Perform a reality check: At this point we recommend that you conduct a meeting with the leadership team to discuss your preliminary findings and give them a sense of what the final report would look like if you were to write it now. It is important to do this prior to writing the final report since they can give you insights into what is possible and what is impossible concerning your specific recommendations.

  The last thing you want to do is present your final report to the leadership team and have them shake their head in frustration because they know that your top three recommendations are impossible to implement (for whatever reason).

  Since there is no "one right answer", your assessment team must be prepared to be flexible. The ideal approach may not be the optimum solution adopted by the leadership team. Reality says that some of your recommendations will simply not be an option to pursue at this time. You want to know what those are at this stage.

- Prepare a written report: The written report summarizes the critical areas needing attention to improve performance. The written report also outlines areas of strength – areas on which the company should capitalize. The final report should recap the ideal solution and, based on your prior discussion with the leadership team, the resulting optimum solution.

- Final read out meeting: Have a meeting with the leadership team to present the final report. Agree to the final set of recommendations. The leadership team assigns process owners to each recommendation. These process owners are responsible to design and implement the solution.

- Close out the assessment: The most common reason that assessments fail is the lack of effective action taken on the recommendations. The assessment report becomes just one more notebook sitting on the bookshelf. Each time Response Design performs an assessment we ask for a list of all the assessments that have been performed in the last two to three years. Once we see the list we ask the critical question, "What actions have been taken as a result of each of these assessments?" Can you guess the typical response?

The assessment team is responsible to track follow through. This can be a tough, time-consuming part of the project. It requires incredible diplomacy and perseverance. Once the contact center assessment team has evidence of action plan completion (or when the management team tells you definitely that they are not going to follow through), the assessment is closed out.

Important Caution

We find that many leaders confuse an assessment with corrective action implementation. The contact center assessment tells you what opportunities for improvement exist in your contact center, and which opportunities are highest priority. Each member of the leadership team must understand, from the onset, that there is a big difference between identifying problems (the assessment) and the next step - taking action. Everyone has to agree to this or you could be investing a lot of time in important thinking needlessly.

Kathryn Jackson, co-founder of Response Design Corporation (RDC) and call center expert helps professionals get more from their call center. Response Design is the how-to source for integrating the call center into the customer relationship. Its independent consultants use call center web seminars, contact center consulting, call center tutorials, call center benchmarking, world class customer service articles, and best-in-class customer service practices to ensure you get the most from your call center investment.