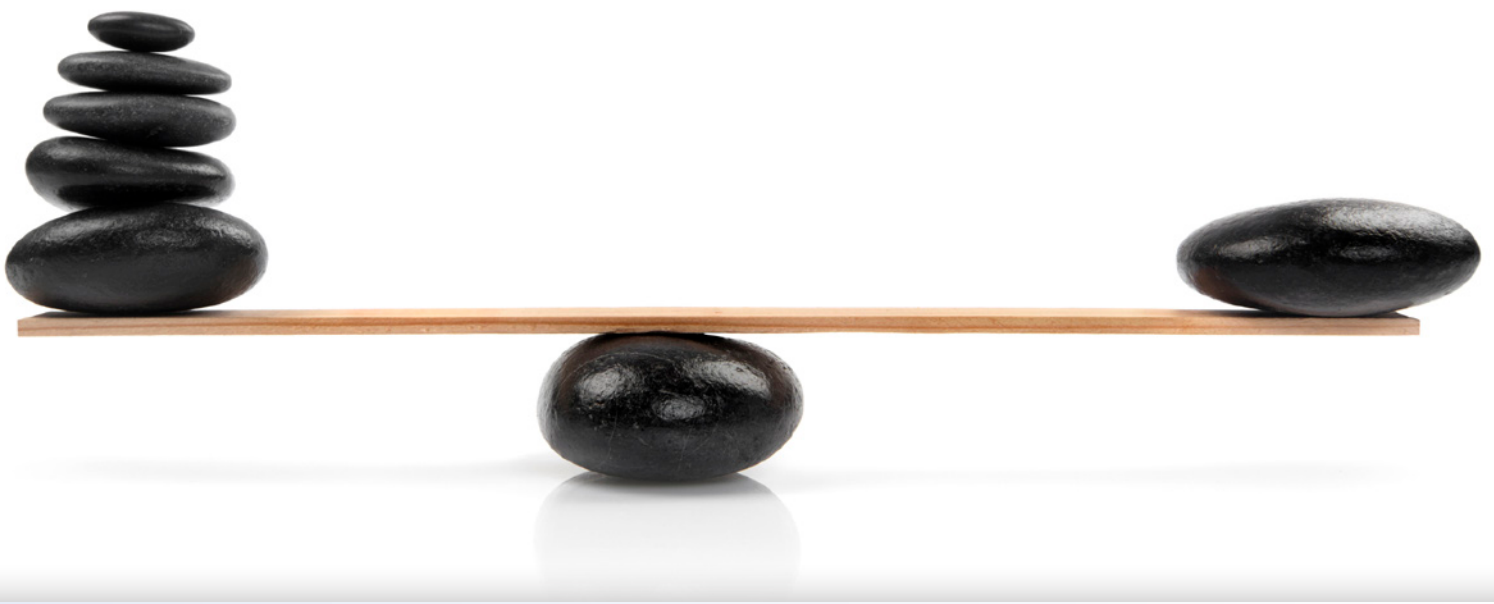


2011

The Business Value in Balancing Call Center Efficiency with Customer Satisfaction

Creating Real Value for Your Customers
and Your Organization in the Call Center



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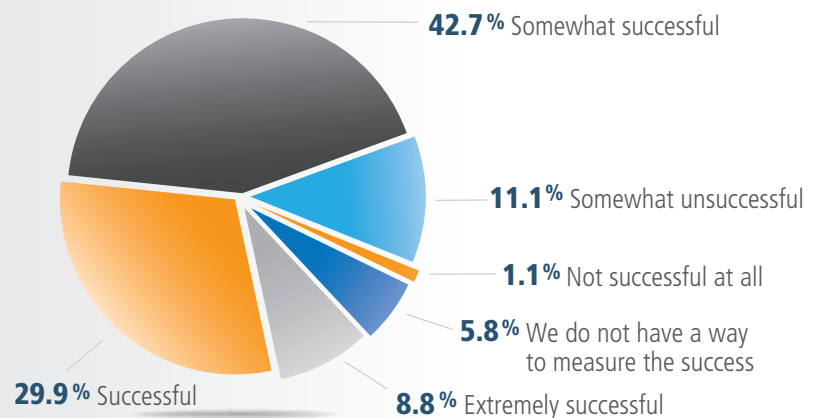


Striking the Balance between Call Center Efficiency and the Customer Experience

In January and February 2011, ICMI surveyed 428 contact center professionals working in centers of all sizes and shapes around the globe about their centers' ability to strike a balance between call center efficiency and the customer experience.

Perhaps the most telling response in the entire survey process is that less than one third (29.9%) of contact center professionals surveyed rate their centers as successful at achieving the balance between call center efficiency and customer experience. A slightly more positive 42.7% rate their centers as somewhat successful in this endeavor. While a small portion (8.8%) say their centers are extremely successful at striking this balance, another 11.7% say they're somewhat unsuccessful at it, and 1.1% say they're not successful at all. Another 5.8% say they have no way to measure success in this area. What this indicates is that there's much room for improvement. (Figure 1)

1. How successful has/have your center(s) been at achieving the balance between call center efficiency and customer experience?



The Business Value in Balancing Call Center Efficiency with Customer Satisfaction

Today's always-on, connected environment is changing the nature of how products and services are sold, delivered and supported. Interactions enabled by the Internet, wireless and mobile capabilities and multimedia technologies are generating new customer demands and creating new opportunities for those organizations that are prepared to offer service on-demand, through the customer's preferred channel, with quality and at service level.

Successful call centers create real value for customers and for the organization. Customer contact centers have the potential to create value on three distinct levels highlighted here from [Call Center Management on Fast Forward](#):

Level 1: Efficiency

Call centers pool information, people and technology resources, making them a highly efficient means of delivering service. Disciplined planning, accurate staffing and schedules, and effective real-time management complement and further the call center's inherent efficiencies. Interestingly, while most of our survey respondents (60.5%) say they never sacrifice the customer experience for enhanced efficiency when making operational decisions, an astounding number – nearly half (41.8%) say they sometimes do.

Level 2: Customer Satisfaction

In recent years, research has begun to reveal the powerful connection between high levels of satisfaction and profitability. Even in non-commercial environments, such as government agencies or non-profit organizations, high levels of customer satisfaction bring many returns to the organization. One of the call center's major objectives should be to ensure that customers' views end up as often as possible in the "top box" on customer satisfaction surveys.

Level 3: Business Unit Value (Strategic Value)

Contact after contact, hour after hour, day after day, the call center captures information that can literally transform an organization; for example, intelligence that helps other departments improve quality, further research and development, focus marketing campaigns, detect potential legal or publicity problems, and provide input on how to improve self-service systems.

Many organizations focus heavily on efficiency. But delivering strategic value requires measures, objectives and processes that support contributions to the entire organization. Taking inventory of the call center's job roles, processes, objectives and technologies and design and aligning them to deliver maximum value on all three levels is essential.

When the call center goes beyond the imperative to deliver services efficiently, focusing on the larger and more complex goal of creating high levels of value for their organizations and customers, it becomes a true value center.

Here, we look at the processes, technologies and people that enable the call center to balance efficient operation with customer satisfaction.

Processes that Balance Efficiency with Customer Satisfaction

The best-managed call centers excel at resource planning and management, and they've built processes that are systematic, collaborative and accurate. Meeting your service level and response time objectives, however, is only an enabler: The real challenge is what your center does once those contacts reach the right places.

When we asked our study participants about the maturity of key processes, we found that training, coaching, quality management and workforce management were among the least mature (see Figure 2).

Let's look at some of the process areas that are important in striking the balance we're looking for.

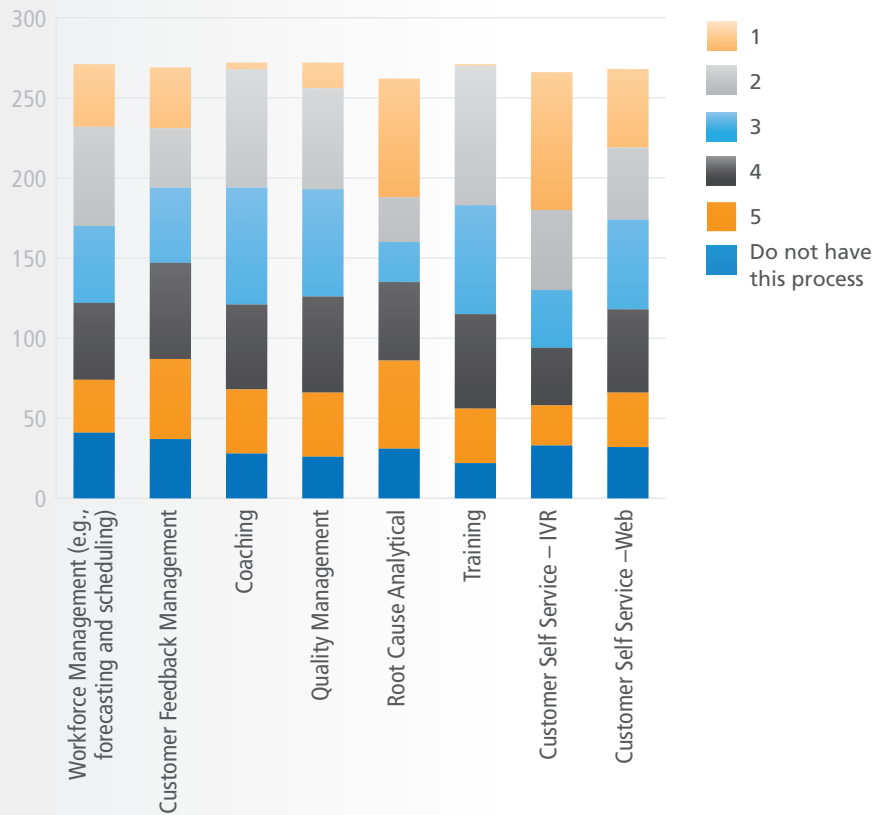
- **Agent hiring, recruiting, training, coaching and involvement.** Putting the best people in front of your customers is critical to handling contacts efficiently and with high levels of customer satisfaction. Constant improvement through training and coaching is key to keeping your frontline on the same track as your customers and your service goals. We include involvement here because agent feedback can be a valuable resource for further improving processes. Unfortunately, many centers collect agent feedback but do nothing with it – at least in a timely manner.

- **Data collection and reporting.** This includes all key metric reporting (average speed of answer, resolution, etc.), automatic call distribution (ACD), computer telephony integration (CTI), first-call resolution, customer satisfaction and feedback, agent satisfaction and feedback, call types, root cause, etc. Does your contact center have processes in place to capture this valuable data?

• **Data analysis.** Can your call center understand trends in call patterns and types? Do you know how best to measure performance so that reporting is accurate? We still see centers measuring first-call resolution (FCR) inaccurately because they do not account for the contact life cycle. And, we find many centers are storing data or reporting, but they do not use that data to understand trends and focus continuous improvement.

• **Acting on data and feedback.** Once the call center has data and feedback, and understands it, it's important to put that understanding to use in the continuous improvement cycle. We still see organizations that cannot effectively act on customer or employee feedback. We can't overstate the importance of this step in effective process planning. Every piece of data or feedback may not require an action plan, but it's imperative to know which ones do – and then to act on them as quickly and effectively as possible.

2. Process Maturity in the Contact Center (one-to-five scale with 5 being most mature)



Where can call centers enable the cost/experience balance through process?

- Quality Monitoring and Coaching
- Workforce Management
- Customer Satisfaction/Feedback
- Channel Management
- Root Cause Analysis
- System Integration

Technologies that Balance Efficiency with Customer Satisfaction

Call centers in today's service and economic environment must be accessible, handle increasingly complex contacts, meet customer expectations, support initiatives throughout the organization and deliver a healthy return on investments.

Opening up channels that customers prefer or demand (whether they've told you or you've seen it in your competition's customer access offerings), is common today. It's important not to lose sight of

service delivery for each unique channel, however. It's critical to make sure that service is seamless across all channels. This is a particular area where technology can help.

Today, courtesy goes beyond the way agents handle calls: It's more systems and process dependent. Technology can help avoid making customers repeat the same information or account history, repeated transfers. Simple steps can go a long way, such as programming IVR menus that are intuitive to use and that allow callers to opt out, but there have been great advances from call center technology providers over recent years that can further improve both efficiency and the customer experience.

Insufficient technology is reported to be the top barrier to both call center efficiency and the customer experience, according to our research. On the efficiency side, survey participants cited better internal technology (WFM, CRM, speech analytics etc., as the primary enabler (51.5%). Note the functions of WFM, CRM and speech analytics can also have a positive impact on the customer experience.

Another technology angle on both efficiency and experience is customer self-service.

Considering the top platform providers and the purchases that are top of mind between 2011 and 2016, it's important to note that many of the platform providers offer capabilities to meet these technology needs or have designated integration partnerships with many of the technology-specific vendors. Knowledge bases, performance management, end-to-end

Where can call centers enable the cost/experience balance through process?

- Internal Technology
- Workforce Management Automation
- Customer Relationship Management
- Speech Analytics
- Self-Service Options
- Agent Desktop Tools
- End-to-End Contact Tracking and Handling Processes

People that Balance Efficiency with Customer Satisfaction

Of course, agents are a high-cost segment in the call center budget. It makes sense to invest in their success and satisfaction. But there are many people who make the call center run smoothly while delivering effective and efficient customer service.

One of the major barriers to success in balancing efficiency with customer satisfaction cited by our survey respondents is Lack of management support to set expectations with customers — or back that practice once expectation guidelines are set — resulting in a lack of realistic expectations with customers.

It falls on the call center to understand its value to the organization — it's ROI in terms of service, sales and customer loyalty. Once you've set the key objectives in your contact center, the next task is to meet them. While process and technology can enable success here, it really depends on the people. In the table below, we look at who does what and the importance of the role they play in the call center's success.

Roles and Responsibilities in Achieving Key Objectives in the Contact Center

Every position — indeed, every person — plays a part in helping the call center to achieve high-level objectives. The information below illustrates the connections between roles and key objectives. While not every possible position/role is included, the roles and responsibilities for accomplishing key objectives below illustrate the diverse but shared contributions those in a variety of roles make to overall results.

Quality

Agents: Have a direct impact on call-by-call quality, which contributes to overall quality, first-call resolution, and a low rate of errors and rework.

Supervisors: Contribute to quality objectives by ensuring that individuals in their teams have the resources, coaching and feedback they need to handle each contact with quality. The experience supervisors have in handling frontline work, as well as their proximity to it, make them invaluable in quality improvement initiatives.

Quality Specialists: Manage a centralized repository of quality data captured contact by contact (by the quality specialist or by supervisors). Analysis of this information leads to process, system, training and coaching improvements.

Workforce Planners: Impact quality by forecasting the call center's workload accurately and ensuring that schedules match requirements (resulting in the right contacts going to the right places at the right times). They also are responsible for identifying the best times for people to work on quality initiatives and training.

Technical Support (IT): Enable quality by equipping the call center with appropriate tools and technologies. For example, information systems that provide agents with accurate, real-time data on customers, products, services and policies contribute enormously to call quality and first-call resolution. Similarly, capable systems that are thoughtfully programmed ensure that the right contacts are routed to the right places at the right times.

Managers/Director: Contribute to quality and accessibility first and foremost by ensuring that agents, supervisors, planners and others have the training, skills, tools and processes that enable them to be successful in their positions. They ensure that the call center is an inherent part of organizationwide processes (e.g., marketing and product development). They also are generally responsible for cultivating a culture that values quality from top to bottom.

Accessibility

Agents: Contribute to accessibility by being in "the right places at the right times, doing the right things."

Supervisors: Contribute to accessibility by ensuring that individuals are in the right places at the right times, doing the right things. They help to resolve adherence problems and often serve as liaison between real-time workforce managers and teams.

Quality Specialists: Are inherently close to processes that impact handling times and other key accessibility drivers.

Workforce Planners: Accessibility is a primary workforce management responsibility. Workforce planners impact accessibility by forecasting the call center's workload accurately and ensuring that schedules match workload requirements.

Technical Support (IT): Enable accessibility by ensuring that systems are structured well, responsive and support real-time call-handling requirements. IT also has the responsibility to ensure that systems are up and running and that technical problems are quickly resolved.

Managers/Director: Contribute to accessibility by ensuring that the call center's priorities — and supporting operational decisions — support accessibility. They see that employees have the resources they need, and that processes and systems support consistent accessibility. They ensure that departments across the organization that may impact the call center's workload collaborate with call center planners.

Efficiency

Agents: Contribute to efficiency objectives, not only by how they handle contacts, but by how they code work. E.g., when they use talk time, after-call work and other work modes consistently and accurately, they contribute to more stable, reliable data for forecasting, scheduling and other objectives. Agents also have a direct impact on adherence to schedule.

Supervisors: Ensure that work is being handled as required, which leads to stable results and reliable data for planning purposes. They also usually serve as coordinators/liaisons for planning meetings and when schedules are adjusted to accommodate changing workload requirements. They have a key role in coaching agents to achieve adherence results.

Quality Specialists: Have a responsibility not just for quality, but for associated efficiencies. E.g., if it takes one agent seven screens to do the same thing another can do in three, quality specialists can drive relevant training and coaching improvements.

Workforce Planners: As with accessibility, objectives related to efficiency are primary workforce planning responsibilities. Accurate forecasting, staffing and scheduling, as well as competent real-time adjustments contribute enormously to efficiencies.

Technical Support (IT): Contribute to efficiency by ensuring that workload tracking tools are correctly programmed and that trainers and supervisors teach agents their proper use. They also have a role in providing and supporting systems that provide reports and data essential to the planning process (e.g., routing systems, reporting tools, etc.).

Managers/Director: Impact efficiency not only by ensuring that the center has the right tools, methods and training in place, but also by establishing a culture of collaboration — and one that emphasizes the importance of accurate and comprehensive planning. And, as with accessibility, ensuring that data, information and plans that other departments have are shared with the call center.

Cost Performance Agents: Have an indirect but significant impact on cost performance objectives. By doing the right things at the right times and handling contacts with quality, they contribute to accessibility and quality, which, in turn, have a direct bearing on cost performance. Also, in revenue-producing environments, sales skills significantly impact revenue results.

Supervisors: As with agents, supervisors have a significant impact on cost performance objectives. By enabling their teams to do the right things at the right times and handle contacts with quality, they contribute to accessibility and quality, which, in turn, have a direct bearing on cost performance. Coaching and monitoring should also support overall budget and revenue objectives.

Quality Specialists: Important aspects of quality include those things that lead to revenue and cost performance objectives (e.g., efficient processes, seeing cross-selling opportunities, etc.).

Workforce Planners: Virtually every cost performance objective is impacted by the accuracy of workforce planning and effectiveness in carrying out those plans. E.g., forecasts and schedules that are improved by just 1 or 2 percent can translate to thousands of dollars of daily savings in medium to large call centers. Appropriate schedules reduce overtime costs, and accurate planning ensures that contacts are going to the right agent groups at the right times — which impacts revenue and cost results.

Technical Support (IT): The technologies available to the call center — their functionality and how they are programmed and used — have a significant impact on cost performance objectives. This is true both for customer-facing systems (e.g., to what degree will they use self-service channels?), information systems agents use to handle contacts with quality, and reporting systems used by management to leverage call center efficiencies and effectiveness. Efficiency of systems, uptime, and technical support response times all contribute to cost objectives.

Managers/Director: Have primary responsibility for identifying budgetary requirements and ensuring that the call center gets the resources necessary to fulfill its mission. They also have a significant impact on cost performance by ensuring that the right people, processes and technologies are in place and working in sync.

Strategic Impact

Agents: Contribute to customer satisfaction (and subsequent loyalty and repeat business) through their contributions to accessibility and quality on a contact-by-contact basis. But agents also have a much larger strategic impact; for example, the information captured during contacts — assuming it is complete and accurate — becomes the basis for product and service improvements and innovations, better marketing campaigns, and quality improvements (inside and outside the call center). Agents are also key in educating customers on the availability and use of self-service access channels.

Supervisors: Contribute to the call center's strategic impact by helping to facilitate their teams' success. Supervisors are also frequently involved in projects and initiatives to identify, measure, track, improve and communicate the call center's impact on the organization (e.g., through data analysis teams and as liaisons between other groups/departments and frontline activities).

Quality Specialists: Typically, quality specialists are involved in assembling information captured during contacts, analyzing it and getting it to other departments for which it would be useful. Quality specialists also are responsible for recommendations on process improvements that would contribute to higher levels of customer satisfaction and agent support.

Workforce Planners: Have a similar impact on both customer satisfaction and employee satisfaction. For example, when the call center is accessible, due to accurate forecasts and schedules, customers are happier because they can reach the services they require quickly and easily. Similarly, good service levels mean occupancy levels that are not too high, giving agents the chance to “breathe” in between contacts and to work with callers who aren't angry from waiting in a long queue. Again, accurate planning matches right resources with right contacts, enabling the highest quality services and customer satisfaction.

Technical Support (IT): Technologies impact customer satisfaction first at the user interface — e.g., are customer-facing systems (IVRs, Web, etc.) easy to use, and do they enable customers to accomplish what they want? “Back-end” systems also have a huge role; e.g., do agents have the information and support they need? Are capabilities in place to capture data from contacts that can be used to improve

products, services and marketing, as well as to better understand customers? The answers to these questions impact customer satisfaction, employee satisfaction and the call center's overall ROI. Technical support also has a key role in developing and maintaining disaster-recovery plans.

Managers/Director: Ensure that the culture, environment, tools and resources are in place to support a high-value environment. They also work with managers across the organization to use data captured during call center contacts to improve the organization's overall effectiveness in meeting the needs of customers. They ensure that call center staff remain focused on the vision of the organization and that behaviors are within company guidelines and support the company's brand and direction.

Source: Call Center Management on Fast Forward: Succeeding in Today's Dynamic Customer Contact Environment, Cleveland, ICMI Press.

With the right people in place, decisions around process and technology are much easier to make and are likely to be more effective. The people, from agents to directors and executives, are the critical thinkers that can chart a path to balancing call center efficiency with the customer experience. True, processes and technologies are inherently enablers in this task, but the best selections, combinations, timing and focus are determined by teams – and the individuals within them – that understand the need for such balance and can provide intelligent contributions to creating it.

Conclusion

We'd like to think that efficiency as a sole primary objective in the call center is a thing of the past, that every organization is actively seeking to balance call center efficiency with the customer experience. But that's not necessarily true. What is evident, though, is that so many organizations realize the importance of focusing on both. Our research shows that there are still some contact centers that will sacrifice the customer experience for efficiency, but it's heartening to see so many that won't. The important thing to note is that these two objectives are not mutually exclusive. Many of the center's choices around people, process and technology can serve both, and the most successful centers today are looking at ways to make decisions to get the best yield for both the customer and the bottom line. That's true ROI for the organization in both the cost to serve and in customer loyalty.

About this Whitepaper

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Resources for this whitepaper include:

[Balancing Call Center Efficiency and the Customer Experience](#) (ICMI 2011 Research Report)

[Call Center Management on Fast Forward: Succeeding in Today's Dynamic Customer Contact Environment](#) (Brad Cleveland, ICMI Press)

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The [International Customer Management Institute](#) (ICMI) has served for more than 25 years as the leading global provider of comprehensive resources for customer management professionals—from frontline agents to executives—who wish to improve contact center operations, empower contact center employees and enhance customer loyalty. ICMI's experienced and dedicated team of industry insiders, analysts and consultants are committed to providing uncompromised objectivity and results-oriented vision through the organization's respected lineup of professional services including training and certification, consulting, events and informational resources. Founded in 1985, ICMI continues to serve as one of the most established and respected organizations in the call center industry.

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