

# Creating a Virtual Call Center Operation: Agent Education is Key

by Susan Hash

**ADP lays the groundwork for a virtual environment by training agents on call center fundamentals.**

The right network technology is, indisputably, a key factor to successfully uniting multiple call centers into a single virtual environment. However, just as important for a seamless transition is frontline staff education and buy-in. A focus on thorough agent training and support played a valuable role in ADP Claims Services Group's initiative to virtually connect four geographically dispersed call centers.

The move was prompted by a need to better balance call loads, says Vice President of Client Services Robert Gray, who led the initiative. Because its call centers service three different client industries, each of the four sites previously had separate service level goals. Product releases for any particular client group would drive up call volume for that one site. The virtual environment, says Gray, enables the organization to more evenly distribute the inbound traffic across time zones, draw on a larger staff to handle the sudden spikes in call volume, and offer its call center agents more job diversity and career growth opportunities.

ADP Claims Services Group, a subsidiary of Automatic Data Processing Inc., provides integrated business solutions for clients in the property and casualty, collision repair and automotive recycling industries. Its call centers are located in California, Oregon, Minnesota and Michigan. The call center in San Ramon, Calif., with approximately 60 agents, handles collision repair clients, while automotive recyclers are serviced by the Plymouth, Minn., cen-

ter with a staff of about 80. The call centers in Milwaukie, Ore. (65 agents), and Ann Arbor, Mich. (80 agents), both support the organization's Autosource product – a database that offers “for sale” vehicle valuation, market search and other information services through a variety of electronic and toll-free call-in/fax-in methods. The Ann Arbor site also has a group of 30 reps who provide technical support on software products for insurance claims professionals.

The Group's previous routing system did not allow for equal call-sharing among associates, so some reps ended up taking more calls than others, says Katrina Rambadt, senior director of Client Services for the Ann Arbor call center.

An investment in networking technology was the first step to balancing the inbound workload across centers. The Claims Services Group installed a new call-routing system (Aspect Call Center), workforce management solution (Aspect's eWorkforce Management) and contact server (Aspect Contact Server).

“While we were launching the technology, we were very upfront with all of our reps about why we wanted to put this in place and what we hoped to accomplish long-term, and we kept them involved all the way through to ensure their buy-in before we went live with the system,” says Gray.

### Call Center 101: The Foundation to Bolster Buy-In

Technology solutions can definitely help to even out the workload among call center sites – but to gain true efficiencies nothing beats an educated, enthusiastic staff. To ensure the frontline associates fully understood the reasons why schedule adherence is critical in the call center environment, ADP Claims Services Group management

provided frontline staff with training on call center fundamentals.

“Operating a call center properly and efficiently is a science,” says Gray. “It's important for our associates to understand why the metrics and scheduling are so important, as well as what each individual contributes to service level on a daily basis – and the impact on the entire peer group and the ability of the call center to achieve its service level goals.”

Although he adds that, initially, he wasn't sure the training would be well-received by the frontline staff, it was “universally heralded. Now everyone understands that, if they don't follow their schedules, they're affecting all of their colleagues in their center and in the other call centers.”

Julie Verran, director of client services for the Milwaukie call center, agrees. “The associates found it very enlightening. They were finally able to appreciate why we're always talking about statistics and schedules – and they walked away with an understanding of the impact their individual contributions have upon the organization.”

### Cross-Training for Support Across Sites and Skill Sets

The network technology to enable the virtual operation was installed about 18 months ago. Once that was in place, ADP launched a cross-training program to enable the associates in the technical support groups to handle additional product lines outside of their call center's core products. In the first year, the goal was to cross-train 30 percent of all agents to handle calls from other sites, says Gray. “This year, we have about 50 percent [cross-trained].”

Overall, the organization is aiming for about 80 percent of its staff to be cross-trained on other products. “It's

based on the associates' time in the job," says Rambadt. "We want them to learn their core products and have a good comfort level with that first. It depends on the individuals, how quickly they learn and their level of interest." Already close to 80 percent of the associates at the Ann Arbor site are cross-trained on insurance-related software issues, as well as recycling and body shop issues.

Rambadt and Verran are working on enhancing the job descriptions for associates who service the Autosource product line in the Milwaukee and Ann Arbor call centers. Because the Milwaukee call center currently supports a single product line, the staff's career opportunities are somewhat restricted. "Right now, there is a limit to how far associates can go in supporting Autosource," says Verran. "The new job descriptions will provide them with different levels of skills they can acquire. Eventually, it will also allow our associates to cross over into technical support skills, and enable them to grow with the company without having to disrupt their families by moving to a new location."

In addition to cross-training for different product lines and learning the call center fundamentals, the frontline staff attended a training class on change management. "It gives the associates the bigger picture and lets them know that their jobs are going to change in order to keep pace with the economy and our client demands," says Verran. "We want to communicate why we have to operate more efficiently and change our old ways of thinking."

Rambadt adds: "Change is always scary for people. Communicating the big picture to show your frontline staff where you're organization is headed will help to get their buy-in for change. The biggest mistake you can make is not asking for associate input and ideas, because

their thoughts are valuable."

The changing roles at ADP Claims Services Group applies to its call center management, as well. While, previously, each call center was responsible for hitting its own service level goals, as a virtual operation, each site's performance affects the others.

"It's not just about my group hitting our numbers," says Rambadt. "I have to be concerned whether or not the other centers meet their performance goals because it's a reflection on me, as well. When you're a virtual call center, your goals are shared."

### **Fostering a One-Team Environment**

When sharing performance goals across locations, it becomes crucial to establish and maintain a team atmosphere among the centers.

One way the group's call center management tries to promote a sense of team among associates is through constant and open information-sharing from the top down. Site managers focus on keeping their associates informed on a regular basis through staff meetings. The call center directors also hold regular informal meetings with frontline associates and their managers to discuss their concerns and issues, or to pass along new company developments. Gray spends a few days in each of the centers every month meeting with local management and frontline staff. "You can never over-communicate," he says. "The reps need to understand all of the reasons behind changes."

Communication tools are set up to share information at the frontline level, as well. An associate in each call center is in charge of writing a "Daily Update," a communication that's shared among all of the centers that presents the associate's viewpoint of news and happenings in his or her call center. The organization also has an intranet portal that staff can visit

for updates on a variety of topics. And associates regularly talk to each other electronically through email and chat. A chat room is set up to allow the reps and technicians to ask questions about clients, products or procedures and get immediate answers from their peers in the other call centers.

Monthly contests with groupwide goals also help to foster the team environment, says Gray. The focus of the contests is on teamwork. "No single call center can win a contest unless all of the centers at least meet the minimum service level in a particular period. So there's an incentive for all of the centers to help each other meet the minimum service level every month." Once all centers meet the established service level, the call center that goes "above and beyond" is the winner for the month.

The frontline associates find the contests highly motivating, says Gray. "They get very hyped on it. They really try to pull each other along throughout the month – and we make sure that when we celebrate outstanding performance in one center, we also do that in all of the centers."

### **It's a Win-Win Situation**

Over the past year and a half, all of the Claims Services Group's clients have benefited from the virtual call center environment. All sites regularly hit the service level goal of 90 percent of calls within 30 seconds. Previously, some sites were averaging around 77 percent. And client satisfaction ratings related to the call centers have increased 15 percent.

Similarly, employee satisfaction ratings are up. "Our associates are feeling more challenged, and they're happier in their positions," says Rambadt. "They have more variety in their jobs, and they feel that there are a lot more opportunities open to them than there were a few years ago." 