

2011

Blending in the Call Center: Benefits, Barriers and Breakthroughs

Smart Considerations for Inbound and
Outbound Contact Center Operations



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Executive Summary

In today's shifting economic and customer demand environment, using the call center to drive brand-differentiating customer satisfaction and to drive revenue are joining operational efficiency as leading strategies for the best-performing organizations. This fundamental shift in perspective is changing the way call centers approach interactions, from the inclusion of new communication capabilities for customer-preferred methods of interaction such as social media and chat to integrating multiple channels for a seamless customer experience.

ICMI recently conducted [research](#) that helps the industry understand how — and if — other call centers handle inbound and outbound as well as sales and service contacts in their centers — and when they are or are not able to optimize for productivity and the customer experience. Our goal was to understand the industry's practices around these activities: how centers account for resources and how their centers perform under current practices. In doing so, call centers and the businesses they serve should be better informed in their efforts to increase agent productivity along with productivity for the whole center by leveraging this critical data around transaction handling. What's impacting service level, average handle time, the customer experience and sales? What are some of the barriers to and success in blending these efforts?

Blending is not always the perfect solution for every contact center or in every area of a given call center's operations. However, this whitepaper focuses on blending inbound and outbound, as well as sales and service operations in the call center, sharing what call center professionals all over the world have identified as the benefits of blending (both real and perceived), the barriers and areas where there may be breakthroughs in today's process and technology arenas that would enable the blended contact center.

Benefits of Blending

To understand better the potential benefits for blending in the contact center, we begin with a simple definition of blending. In the blended call center, both inbound and outbound contacts (telephone calls, emails, chat, text, social media, etc.) are routed to the same agent pool (with inbound calls taking precedence over outbound activities). The blended environment offers advantages in the call center in operational effectiveness, such as staffing (which has a direct impact on service levels and satisfaction) and agent burnout, as well as in providing a more holistic service experience to the customer. Blended environments present attractive advantages, including optimized productivity and service levels and a consistent level of service offered to all customers, where the company can more proactively build and capitalize on customer relationships, for example.

In recent ICMI research, we found that even where centers are deemed exclusively inbound or outbound, they are performing, to some extent, both types of activities. Significantly of note is that in the inbound environment, outbound calls are sometimes necessitated for call resolution and customer satisfaction; however, inbound centers that do not account for such types of outbound calls may be experiencing inefficiencies because they do not account for and track these calls. The same can be said of outbound centers or agent pools and the number of "informal" inbound calls they may be receiving (e.g., inbound customer callbacks or internal return calls or call ins). Of course,

the amount of outbound calling in an inbound center — and vice-versa — does not merit specific accounting in every center, but it is a good practice to at least keep an eye on them, looking at both frequency and duration and the work that generates them and that they create.

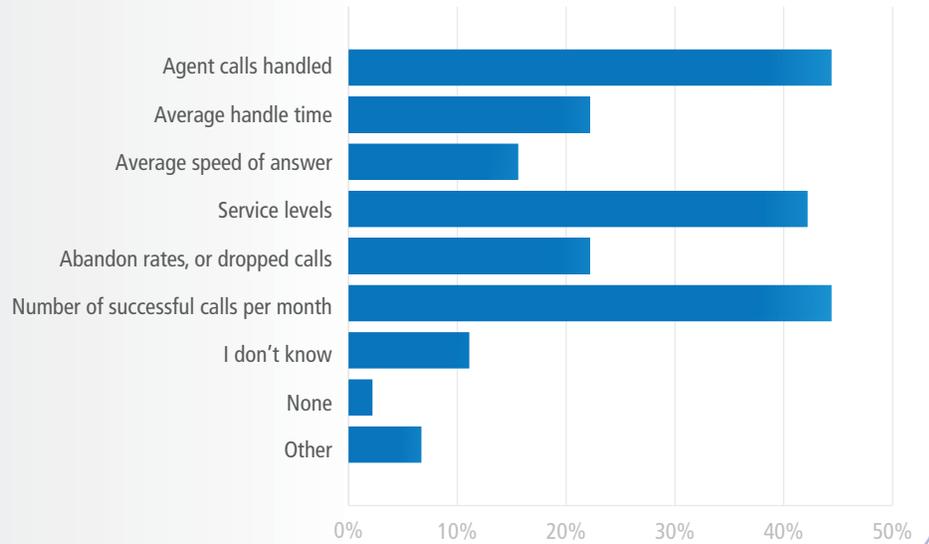
For both types of call center, we’ve found — through research and anecdote — that although call centers with a blended environment in place are in the clear minority, many are trending toward an understanding that two-way communication between the call center and the customer can enable a positive impact on the customer experience and operational efficiencies. In fact, a significant number of survey participants agree that they consider that blending inbound and outbound calling in their centers would be beneficial to their organization in both adding revenue and in increasing customer satisfaction. Not only did an overwhelming majority in the research study *Contact Center Practices for Pairing and Blending Inbound, Outbound and Service and Sales* say they could see the value of blending to improve the customer experience, they said they’d expect to see improvements in operational inbound metrics such as service level, the number of calls handled and abandon rates, as well as the outbound number of successful calls per month. (See Figures 1 and 2)

Barriers to Blending in the Call Center

Centers for which blending doesn’t make sense (due to workload, strategic purpose, the nature of their work) aside, there are still some very real and perceived barriers to incorporating blending in today’s inbound and outbound call centers (see the chart on barriers to blending). (See Figure 3)

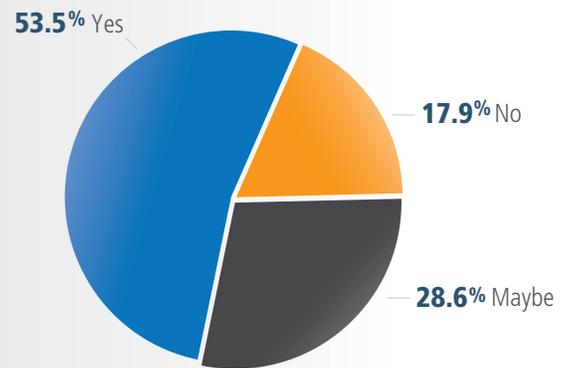
Apparently, many contact centers see the value in blending, but currently, there are many hurdles — insufficient resources, training requirements, impact on workflow, technology gaps and more.

1. Metrics expected to improve by call centers considering blending



Source: *Contact Center Practices for Pairing and Blending Inbound, Outbound and Service and Sales*.

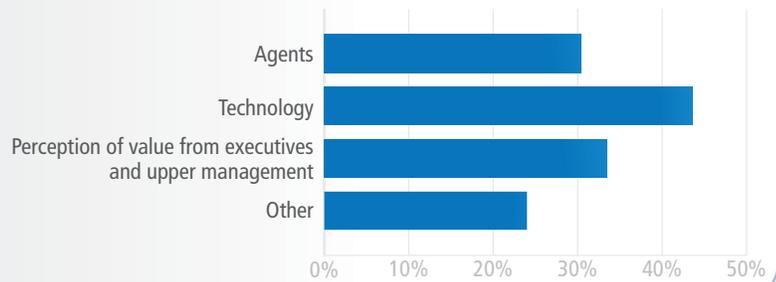
2. Perceived customer experience value in applying a blended process in the call center



Source: *Contact Center Practices for Pairing and Blending Inbound, Outbound and Service and Sales*.

In fact, technology, executive perceptions regarding the value of blending and agent skills and sentiment were identified as top barriers, of course, but these appear to be reliant on any given center's inability to integrate technologies and to overcome agent perceptions about the nature of the work. While the recent study referenced here concentrated on inbound and outbound calls (including service and sales), it is useful in pointing to both the hurdles and opportunities call centers have faced while trying to incorporate many emerging channels (social media for example).

3. Barriers to blending



Source: *Contact Center Practices for Pairing and Blending Inbound, Outbound and Service and Sales*.

Technology Barriers to Blending

Perhaps the leading technological barrier to incorporating a blended approach in the call center is the addition to/integration of automatic call distribution (ACD) systems and outbound dialers. We'll add to that, since we know they're important for success in the multichannel environment, computer telephony integration (CTI) and customer relationship management (CRM) systems. The former, ACD and outbound dialers are critical, though, for getting up and running, and several centers say this is an expense that's not justifiable at this point.

Answer these questions: Is there a dialer or an ACD somewhere in the organization now that could accommodate the extra load that they might avail their centers of? (We'll also talk about dialers more as we get further along.) Do we currently have — or can we imagine a critical customer service and/or operating efficiency strategy that would include — enough of the other type of call to justify the investment? If the answer to either of these is yes, blending is certainly an option to be considered in near- and long-term strategies.

But, it's important to note that for those centers that have considered blending or taken it on in the past only to re-segregate inbound and outbound contacts, one of the chief stumbling blocks, even with the right technologies in place, has been that the tools don't operate dynamically with each other so that workflows can be managed effectively. In those cases, we've heard of agents disconnecting an inbound call and, with 10 seconds on the clock before break, jumping on an outbound call. This is just one example of the possible technology — and process — disconnects that can make blending seem to be a source for havoc on service levels and customer satisfaction.

Also, ask yourself, or your call center's stakeholders, do we want to do just look at blending in and of itself, or do we want it to add capacity to capitalize on operational efficiency and increase customer satisfaction? If the answer here is yes, then your center will need to focus on CTI and CRM integration so that touchpoints — regardless of whether the call or contact is inbound or outbound — are seamless for the customer and the agent.

Agents as a Barrier to Blending

You may not find it surprising that agents view change to their roles as hard to swallow, certainly those in the centers represented in our research did. Outbound calling does take a somewhat different approach to taking inbound calls, and vice-versa. Successful blending almost always requires additional training. For those centers that struggle with scheduling for training — and yes, adhering to training scheduling on a regular basis through the use of effective workforce management practices — blending will likely only worsen the situation. Even the center that makes time for training and adheres to schedules should take pains to prepare for the impact on this practice that blending could create. That said, training that is appropriate and is delivered consistently and with the proper expectations (thoughtfully set and made known to everyone) enables the introduction of blending without the baggage that comes along with agents perception of changing roles and demands, as we've seen in centers that have done it successfully.

It's good to note that, based on our findings and those of others, as well as anecdotal observations, blending offers agents a variety in their day that can stave off burnout and lower turnover.

We see, too that the agent workforce pool is an issue that some centers site for blending's poor fit within their centers: Solid training practices, coupled with highly effective screening and hiring may improve this issue. And, of course, if agent training would be a true barrier to blending in your call center, it may be time to reconsider how your center approaches training in general.

Executive Perceptions of the Value of Blending

Our survey uncovered that more than one third of executives just don't perceive the value in blending. There is a disconnect here, but we could hypothesize that those executive valuations of blending are colored by the technology and agent-related barriers above: It'll cost more and agents won't want or be able to do it. This paper will discuss some of the breakthroughs that might ease the technology and agent burdens and, possibly, might influence they way executives look at blending.

Executive/Management-Related Barriers to Blending

The following anecdotal notes on why call center executives and management don't see the value in blending encompass both technology and agent challenges, as well as those related to a disconnect regarding the type of activities that actually take place between the contact center and the customer.

- Difficulty in quantifying the labor cost savings in a blended environment
- Cost
- Budget constraints
- Sales management does not want sales activity outside their control.
- Viewed as a cost/benefit issue: management sees inbound calls as more critical to keeping the service level up/ abandonment rate down instead of seeing community perception of how available our service is
- Lack of understanding of the actual order process where each order requires multiple touches

All of the challenges that executives and management envision when they think of blending can't be overcome for every center, of course, but being aware of their perceptions and looking for ways to tactfully challenge them — with case studies, research and the like that appropriately apply to your center — will be an effective tool should you determine that blending is worth exploring for your center.

Breakthroughs in Blending

Although our recent research showed that adoption rates for blending are low — some centers have even “unadopted” blending — we find that for many call center management- and executive-level professionals — and for those of you who are among them — there are some breakthroughs in both technology and processes and practices that put the call center in a better position to address long-time challenges both real and perceived and to succeed with blending.

Practices and Processes

This paper addressed earlier the almost certain need for additional agent training in the blended environment, particularly when introducing it in an existing inbound or outbound call center, as well as key requirements in the training strategy and approach. It’s worth it to note here, again, that agent training is a necessity in the everyday life in nearly every call center.

It was notable in our recent research that blending either does or is highly likely to drive up average handle time (AHT). Indeed, AHT does tend to increase in a blended environment, but it should be viewed in overall context of impact on the customer through improved service and more effective use of resources (think schedule fit and the pooling principle).

Success is also occurring in the industry when processes are applied to other areas. Inside sales departments are benefitting from the application of traditional service practices such as quality monitoring and coaching. And service centers are seeing success in taking a lesson from the sales center by focusing less on AHT as a key operational metric: These centers, in particular, are seeing faster success when they start to blend cross-selling and up-selling into their service activities.

In the call center industry, we’re seeing that call centers that succeed in agent satisfaction, customer satisfaction and even performance against operational metrics are not just training on a consistent basis, they’re taking a whole new approach to the practice of training, monitoring and coaching, including:

- Setting expectations that make the agent a stakeholder in the outcome; e.g., call centers that are able to effectively get agents onboard not just with additional training, but with the expected strategic outcome.
- Including training effectiveness in the quality monitoring, as well as in transaction monitoring, scoring and coaching.
- Incorporating agent feedback that allows them input on every part of their job and the work they do: If something’s not working, the agent is usually able to tell you from the ground position why, or at least what’s going on that might be negatively affecting performance.

These are not new approaches; in fact, they’ve been a part of business collaboration since the dawn of making a penny, but they’re still relatively new to the call center industry, where directives are pushed down from above and rarely see information passing upward with and formality or consistency.

Before you even get your agents in their seats, however, the call center should be looking at how well they fit in early on, in the screening and hiring process. Today, there are many approaches to more effective screening and hiring, some of which include advanced technology offerings while some successful ones do not. Is the workforce pool for your center truly incompatible, or is your center unable to identify, hire and set expectations for the right candidates? This, of course, is something to consider for any center, certainly those that are aiming for a channel-rich environment and those that are operating a blended environment or considering doing so.

On the process side, we also look at how work is doled out to agents. You wouldn't simply tell your agents, "We're going to start doing outbound calls from this inbound center. Inbound takes priority, but we'll leave it up to you as to when you jump on the outbound lines." Instead, you'd create a formal process that lays down the rules and the policies for addressing the workload properly. As we'll see in the next section, solutions providers have been at work to help control how and when that inbound/outbound gate swings, taking some of the guesswork out of the equation.

These and so many other things will color not just the perception of blending as a fit for the call center but the real outcome as well. But keep in mind, these are the same practices and processes that are influential the daily and longer-term strategic successes with the organization's entire investment in the contact center.

Technologies

Today, leading technology and solutions providers are bringing the knowledge that they've gained alongside their customers to the market as thoughtfully informed products and solutions. The best of them — sometimes with the help of consultancies — are able to guide customers through the maze of matching tools with strategic goals and planning and implementing for success.

This paper briefly discussed hiring and screening tools, and we should mention that there are also very good tools for delivering scheduled training to agents at a rate and level that is most appropriate for them. Also worth of inclusion here are today's technologies that are enabling multichannel contact center environments that can enhance the implementation of blending as well as enable it.

CTI, which lets the call center and its agents know if and when customers tried to use other channels before going to another — including a live agent — and what their current information and activity status is, has shown to be a critical enabler to a seamless customer experience in the multichannel environment. The same can be said in the blended environment, where CTI can be used to deliver informed outbound calls to customers who've abandoned a contact or who need additional follow up.

CRM, like CTI, is an experience enabler in that it can help the organization understand both the needs and the "value" of a customer. Additionally, CRM can be integrated to prompt those outbound calls or notifications that customers should call in, with the added value that it can be mined for information that can help the call center — service or sales — maximize any contact with the customer (provided that the data maintained in it is accurate and up to date).

Outbound dialers and the solutions that allow them to be integrated with the inbound ACD are critical enablers for the success of blending in the call center. It's no wonder that their requirement paired with traditional cost models for purchasing and implementing them has put some centers off the idea of blending. Couple that with the fact that this solution has not been typically thought of as the sharpest knife in the drawer — a drone technology, really — and the challenge to blending is magnified. Today, however, the reduction of capital expense that has accompanied the advent of hosted and cloud solutions is taking the bite out of the sticker shock normally associated with adding the outbound dialer. Additionally, we see that call centers that are succeeding are truly integrating ACD and dialer operations. In some cases, this has stemmed from homegrown logic (often related to good old failure), but we're also seeing offerings entering the market that are designed to take these needs into account: No longer are dialers just dialers, they're integrated with the ACD to make sure that the outbound work is delivered to agents intelligently and that their use and performance can be tied to traditional inbound and outbound, as well as sales and service metrics.

All of these advances in tools, as well as process shifts, are considered breakthroughs to enabling blending in the contact center.

Conclusions

We see a trend emerging in the realization that two-way communication between the call center and the customer could have a definitely positive impact on the customer experience and the satisfaction levels.

A significant number of the call centers we surveyed are split evenly between inbound and outbound calling. However, the overwhelming majority of those call centers segregate these activities, but in both environments, there's a strong opinion that that blending inbound and outbound calling in their centers would be beneficial to their organization in both adding revenue and in increasing customer satisfaction. Barriers related to technology, agents and executives and management are likely to persist — for some call centers, in particular — but it's possible that new ways of looking at how the call center does its work and enabling technologies and solutions could open doors once closed to blending in others. For some call centers, this could uncover a path to further ground for optimization or increasing productivity paths that organizations might take today to save money, generate revenue and increase customer satisfaction and loyalty.

About this Whitepaper

This whitepaper includes findings from ICMI's *Contact Center Practices for Pairing and Blending Inbound, Outbound and Service and Sales*. In June and July of 2011, 440 call center professionals from around the world shared with ICMI how — and if — they handle inbound and outbound as well as sales and service contacts in their centers. Our goal was to understand the industry's practices around these activities: how centers account for resources and how their centers perform under current practices.

This research was made possible by the underwriting support of Five9 (www.five9.com). ICMI research sponsors do not have access to research participant information, including individual survey responses.



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The [International Customer Management Institute](http://www.icmi.com) (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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