

Reengineering Customer Support

Part 4: Launching the Project



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In the first three parts of this series, we identified the eight key indicators that your organization may require reengineering and how to perform an in-depth operational assessment once you have observed the symptoms. This installment will address launching the reengineering project after you have completed each stage of the assessment.

Every reengineering project is different, and the solution must be tailored to the situation. Anything other than a tailored solution contradicts the concept of reengineering—which is a ground-up redesign, not the implementation of a predetermined model. However, while the solution details will vary from one project to another, there are proven approaches that can be applied to every reengineering project.

As you launch your project, you'll need to make several choices for how you'll tackle reengineering, including handling all aspects of the initiative in-house vs. hiring an outside consulting company. You can assign the responsibility to a single person, or you can assign a team to work on it. If you go with a team approach, you can assign a team of managers or delegate to a team of non-management. There are numerous combinations and variations possible, many of which I have tried or observed. Through many years of research (actually, through a painful process of trial and error), I've developed a methodology that works. As I'll discuss further, my chosen method in-

corporates the best aspects of many possible approaches and combines them in an effective manner.

The Collaborative Team Approach

I recommend creating teams composed primarily of your people—the people who actually perform the legwork, not management. A professional facilitator should assist each team—someone who understands team dynamics and can keep the team on track. Each team should be augmented with outside “content expertise,” or they should have resources available to them. This approach has delivered results consistently that could not be attained by any other means, and the method provides several key benefits:

- **A better solution.** Through the collaborative efforts of the outside expert and your in-house staff, you can be confident that the recommended solution will be realistic. The recommendation will not be a theory developed by outsiders who don't understand your culture or infrastructure, and it won't be a weak solution developed by a team of insiders with limited expertise in the reengineering of support operations. The solution will be reached through combining outside content knowledge and functional expertise, along with your team's firsthand familiarity of your business, customers, and other pertinent factors, and the result will be an optimized solution.
- **A better implementation.** The ef-

evolutions in the customer support center

fectiveness of any problem resolution is dependent on the quality of the solution and the acceptance of those responsible for implementing and maintaining it. Because the reengineered model will be developed primarily by your staff, those responsible for implementing the solution will contribute to and accept the solution as part of the development process. In other words, you won't have to sell them on the solution.

- **Learning (while doing).** Your people will participate in every aspect of the project and, as a result, will be better prepared to maintain and apply the model after the initial implementation. The team members also will be better prepared to resolve similar issues in the future. The reengineered model may be a one-time solution, but the methodology will become an ongoing approach for problem solving.

Defining Teams and Selecting Participants

Don't assign the whole project to a single team. Divide the effort into logical segments and assign a small team to each. This way, multiple efforts can be carried out in parallel, and you can overlap the start of new teams as appropriate. In addition to reducing the overall project timeline (this technique can cut the project length in half), you also will benefit by getting more productivity out of your employees.

The essence of reengineering is process improvement, so you must designate at least one team to focus on process or workflow. The primary process in a support center is call or incident handling, so a team must be tasked with determining the optimal process for routing a customer with an issue to the person who can resolve it. This workflow team also might address problem resolution and problem escalation. However, you could divide dif-

ferent steps in the process among two or three separate teams, depending on the size and complexity of your organization.

An additional team can be assigned to work on the training and cross-training necessary for the newly reengineered process to work effectively; another to work on modifications to the tools, such as the phone menus, skill-based routing of calls, e-mail and/or Web systems, modifications to the CRM system, a knowledgebase, and other enabling technologies; and yet another to define performance measurements or career paths. You also might want a separate team to focus on communication to the various stakeholders.

A good size for teams is four to six people (not including the facilitator or other experts). Assign a good mix of skills and experience on the teams. You should try to organize reasonable representation from each different support group and level of support within your organization. This does not necessarily mean that you need an individual from each group on each team. The goal is to ensure that you have team members with sufficient knowledge of the basic functions of each group and that each group feels assured that they are represented adequately.

When selecting team members:

- **Always ask for volunteers.** The best team members are those who have a real interest and desire to participate. I usually ask for volunteers during a project kick-off session. Make sure that everyone understands that the project will be hard work...it's not just a way to get off the phones! From the volunteers, select your "best and brightest." Although it can be difficult to take your best people away from their normal duties, this is an important project, and you need your top

employees working on it.

- **Balance the level of experience.** Although there may be a tendency to want to put your most senior staff on the teams, the seasoned members you do select must be top performers. These experienced top performers can add tremendous value through their knowledge about your products and customers; however, the so-called "newbies" can offer a fresh outlook and have not yet adopted the "that's the way we've always done it" mindset. A good balance of senior and junior members will deliver the best results.

- **Don't form teams from management.** This is one of the most difficult adjustments for many companies. If the team is made up primarily of managers, you lose one of the key benefits of the team process—staff buy-in. If the project is viewed as just another management initiative, you will miss a golden opportunity to get your people completely bought into your work processes.

Managers generally are accustomed to managing; they want to lead. If you put them on a team, you can risk damaging the team dynamics. Other team members may feel obligated to let the manager lead. They may feel intimidated by the manager's presence, which likely will cause their participation to suffer. The results typically are better if the people who actually do the work are analyzing and deciding on the changes. They generally are better suited to determine the most efficient way to get their jobs done.

- **Design the teams to be successful.** Be very selective; your criteria should be objective and appropriate. Don't select someone simply because the person volunteered. Although I do suggest asking for volunteers, you should not hesitate to turn someone down graciously if the person's quali-

fications are not a good fit for the team. As well, if an exceptional employee who is particularly suited for a position on a team fails to volunteer (perhaps this person already has a full plate), you should ask him to participate, and help resolve any conflicts he may have with his current workload or schedule. The goal is to assemble the best teams you can.

Managing Reengineering Teams

All team members should be provided with training on the team process. Although many of them will have participated in some form of team effort previously, this does not mean that they were trained properly or that the experience provided them with the skills necessary to work effectively on a team. It is important that all team members have fresh training on how to be a productive team member.

Teams must be provided with very clear goals, equally clear boundaries, and well-defined timelines. In my work, I insist that each team sets a weekly meeting schedule. The teams should use the weekly meetings primarily to review the results of individual actions, brainstorm, and then plan out the next set of tasks, which then should be assigned as action items to individuals or small sub-groups. The team can reconvene each week to review progress, analyze findings, discuss the implications, and determine next steps. This process makes effective use of time and allows many tasks to be performed in parallel.

It is very important that each team be provided with expert facilitation. A facilitator can guide the team through the reengineering process, help them avoid common pitfalls, and mediate the inevitable conflicts. It's the job of the facilitator to introduce good problem-

solving techniques and ensure that the team considers all options before coming to any conclusion. Sometimes facilitation expertise is available internally, but very often, it must be brought in from the outside.

Teams also need access to expert resources and new ideas. Often, the teams will be challenged by complex technical issues, such as how to estimate the staffing levels required to deliver a particular level of service or how to structure a knowledgebase so that novice users can find their own solutions. The teams need access to different ideas and examples of industry best practices. Providing expert resources to help the team with particular tasks can shorten the learning curve and improve the quality of the resulting solution.

Communicate, Communicate, Communicate

Throughout the project, communications will play a key role. There should be written output from each team meeting. Reports from each project team might be compiled by the team assigned to communications and distributed as an overall project status report to all of the teams. The communications team can even publish a condensed report for all department em-

ployees (or even the entire company) in the form of a project newsletter.

In addition to written communications, a variety of group information-sharing sessions should be held. I've found that an all-department meeting should be held every 60 to 90 days. These meetings serve to update the rest of the staff regarding the progress the teams are making. This is an opportunity for people to ask questions and to provide feedback to the teams. It's also an opportunity for the teams to test ideas and introduce the new concepts to the staff. Change is difficult for most people, and acceptance generally is easier to achieve if people are allowed time to adjust.

Summary

Reengineering equals major change, and change is always difficult for people. Applying the collaborative team approach can help to minimize the natural resistance to change. Utilize your own staff for the reengineering project, but make sure you provide them with a facilitator and access to necessary expertise. Don't underestimate the importance of communication. Ongoing communication, both internally and externally, can ease concerns and prevent many problems. ▼