Reengineering Customer Support

Part 7: Implementing the New Model

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In my previous installments of this column series, we've addressed preparing to reengineer an organization, performing an in-depth operational assessment, setting up teams to carry out the project, the data collection and analysis, and designing a new model. Now we will discuss implementing the new model. When I help clients to reengineer their support operations, I classify the implementation issues into seven major categories: the call/incident routing mechanism, staff planning and scheduling, the case management tools, training, facilities, organizational structure, and communications. The details will vary from one implementation to another, of course. In some instances, no action is necessary in a particular category. Maybe you don't need to change the organization structure or modify the facilities. However, it's an effective rigor to look at each category and consider the potential ramifications of the planned model.

Call/Incident Routing

Translating the call-flow design into reality is probably the most important step in implementing the new model. During the earlier design phase, we created a "logical" flow. We determined how the calls should be sorted for routing to agent groups or individual skills. Now you must translate this logical design into reality. It's similar to turning an electrical schematic into a physical chip or circuit board. Both phone calls and "e-support" (e-mail and Web) need to be considered. However, it's usually easiest to design the call routing first and then use that as a model for setting up how e-mail and Web-generated incidents are routed.

Designing a call flow is essentially translating the desired logic into a series of voice menus on your phone system. Think back to the data collection phase and how we asked ourselves what questions we would ask a customer in order to determine the proper skills necessary to solve the issue. Consider asking these same questions in the phone menu in order to route callers to the right agent groups or skills. (Example: If you're calling about Product A, press one; Product B, press two; or Product C, press three.) While this might seem simple on the surface, it becomes complex when you must sort/classify each call until you reach a point where you then can hand it to an agent with a [insert your first-call resolution target here]-percent chance that the agent will solve it! This means working through a decision tree until you are confident in routing to an agent for resolution.

Staff Planning/Scheduling

One of the typical management "revelations" during the reengineering process is recognition of the importance of staff modeling and scheduling techniques. Proper levels of staffing are critical in order to achieve service level targets. In a typical support operation, being short one or two people (at any time during normal hours of operation) can cause customer hold times to double. In order for the new model to work, you must have just the right number of people with the right skills at the right place (on the phones) at the right time.

There are two major steps in this staffing exercise. First you must determine the required level of staffing (hour by hour). Second, you must build a schedule that assigns specific agents to phone duty. During the first step, you can reuse much of the work from the data collection and analysis phase. In fact, if you did a thorough job of modeling, that model should be step one, leaving only the assignment of agents to complete the exercise. If you did not build a detailed model, you must do so now (see Part 6 of this column series: “Designing a New Model”).

For the second step, you must assign specific agents to be on the phones. This can be simple for smaller operations, but can get very complex with larger groups and multiple skills. Simple or complex, you must end up with a schedule that ensures that you have the appropriate mix of people/skills on the phones for the expected call volume. Since you can’t leave someone on the phones all day, or even for three hours without a break, this can present a challenge. Let’s say that you schedule half of your staff to be on the phones in the morning and the other half in the afternoon. Sounds simple. But what about breaks and lunch coverage? Remember, being short one to two agents can double your hold times. When one or two agents take a 15-minute break, they return to a backlog of holding customers. And once these customers back up in the queue, those hold times can be with you for the rest of the day. So you must build a staffing schedule that provides consistent coverage throughout the day. If you have 50 or more agents in your support center and you are employing skills-based routing, you should consider workforce management software.

Call Handling/ Management Tools

The next group of implementation issues to consider includes the tools that agents will use to look up customer information, log calls, and solve customer issues. In many companies, these are several separate systems. Very often, opportunities for substantial efficiency improvement through system integration or upgrade are identified through the reengineering process. Whether you choose to improve your systems or not, you must ensure that the systems enable the agents to get their work done effectively.

This task requires that you think through and document every step in the process and consider how each step will be performed. The primary goal is to ensure that each step in the process can be accomplished using the tools that are available to the support agents. The secondary goal is to ensure that the tools allow the agents to be efficient in accomplishing these tasks. Can every step be performed smoothly with existing systems, or will the process require an agent to go back and forth between multiple screens or systems? Think through each step in identifying a caller, looking up the customer record, verifying entitlement, logging the new call, and so forth. Do the tools enable the process to operate smoothly? If not, does it make more sense to modify the process or modify the tool?

Staff Training

There are three standard categories of training required for employees working in customer support: technical training (your products/services), customer service training (a.k.a. soft skills), and tools and procedures training. Technical training means teaching employees what kind of questions they are likely to receive and how to answer. New employees also should receive customer service skills training—how to ask and answer questions in a way that establishes credibility and control, how to deescalate volatile situations, and so forth. In addition, employees should be trained on how to use the various tools at their disposal (e.g., phone system, call management system, knowledgebase) and the associated policies, procedures, and so on.

When implementing a new (reengineered) support model, you need to reevaluate all three categories of training for all agents. You’re changing the policies, procedures, and tools, so agents certainly will need training to work in this new environment. Also, agents now may be getting calls that they have not handled previously (depending on how you set up your call flow and skills routing). So you must develop a matrix of agent skills and design a cross-training program. While experienced customer support agents may balk at service skills training, these agents often need it most. With all of the changes and all of the required training, it’s a good time to blend a little service skills refresher into the mix.

Physical Environment

A vast majority of customer support centers, particularly in the technology industry, are an offshoot of something else, such as product development or marketing. When you walk through these areas, they often don't look much different than the rest of the company—typical cubes with a computer and a phone. However, you see something quite different at a professional "call center."

A true call center is designed to maximize the efficiency of the work being performed. You see rows of low-walled cubicles and feel the power of controlled activity. The lower walls are intended to allow agents to communicate with one another (verbally and visually) and to allow supervisors and agents to work together as a team. It's an environment that's tailor-made for the work process.

If your newly designed process separates the inbound call handling from the research and follow-up work, then a separate inbound call handling area may be a worthwhile investment. As much as we talk of multitasking, most people recognize that we are most efficient when we can focus on a single task. And you are even more efficient when the environment is designed for performing that task and when there are minimal distractions. In most support centers, the job entails two primary tasks: (1) taking and handling inbound calls and (2) performing follow-up research and testing issues that were not resolved during the initial call. For many support operations, separating these tasks increases the efficiency. Separating these tasks also can give agents relief from feeling that they have spent all day on the phone with customers (a feeling that can lead to agent burnout and high turnover). Providing a sense of mental separation from the phones can reduce burnout and turnover, and providing the physical separation helps to establish this mental separation.

Not every support operation needs this separate call center setup. Certainly, there is a cost associated with it. But you must consider the potential benefits of the separate area option (vs. the cost) along with other possible physical changes that would enhance the new process.

Organizational Design

Process reengineering does not necessarily require organizational restructuring. However, if you have redesigned your processes completely, you may find that the existing structure just isn't practical or has too many conflicts. If this is the case, I recommend the following procedure.

After designing your new process and determining the required headcount to staff each function, sit down and design an organization chart that makes sense for your new process. Don't use any names! Just design an organization chart that enables and complements the process and fill in the "boxes" with the quantity of staff required. Then add the management slots that are appropriate based on the headcount and responsibilities (again, without using names). Add in any administrative or other "indirect" roles.

With this organizational design complete, go in and match the existing management names to the available slots. Any mismatches? Resolve them now. Don't try to force square pegs into round holes. Next, have the new management team sit down as a group and allocate the available resources among them. This is similar to choosing teams for sandlot baseball. Sophisticated and high-tech? No. Effective? Yes. The result should be an organization designed to operate effectively based on the process and workload and staffed based on the best match for the job to be performed.

Communications

At this point in the project, it may seem that the communication issues are the easy part (compared to everything else you must do in order to implement). This may be true, but it is no less important. A well-designed and implemented plan can be undermined by poor communications. You must think through the necessary messages to customers, support employees, and the rest of the company.

Customers are most important. Depending on your business, you may need to communicate many details. Do the same customers call on a regular basis and need to understand the changes and how the new process will work? Will new phone menus confuse customers? Would a letter and a menu map prevent every agent from having to explain the changes to each caller? Or are you fixing problems that have plagued customers and now want to announce the planned improvement? This may be an opportunity for some PR!

The intra-company communications is another opportunity for PR. In many companies, support may catch a lot of flak when things go wrong or when customers aren't getting the best service. Here's your chance to tell them about all of the hard work that went into this redesign and to prepare them for the "new and improved" support model. Typically, sales and marketing are particularly interested and may want to work with you regarding the customer communications as well.

Conclusion

The implementation phase typically takes two to four months. That's two to four months spent planning and preparing for the day you'll "go live"—not two to four months implementing piece by piece. Implementing a reengineered support model is like building a high-performance engine. The final result is dependent on having all of the right components properly assembled and roughly adjusted (we'll tune it later). If you try to run it before all of the pieces are in place, it will flop. Wait until everything is ready, and then throw the switch. ▼