



## Have You Scheduled your Annual Check-up?

By Dave Brown, President, Support Center University

Having an operational assessment performed on your customer support operation is much like going to the doctor for a physical exam. Some people view that as good 'preventive medicine', and as such, they do it every year to avoid problems. The majority, however, do it because they've experienced a symptom—that is, they have a specific concern. This article outlines five of the most popular reasons companies pursue an assessment of their support operation.

**Reason #1: Management is concerned about service/support performance levels.** They may be receiving more frequent complaints from customers (or low survey ratings) regarding the speed or quality of service. Or service levels are fine, but management may be concerned that headcount and costs are growing at a rate higher than other departments in the company. In some cases, the ratio of support headcount to problems handled or other key performance metrics just don't add up. In other cases, service levels may be declining or staff turnover may be unusually high. When management observes signs that 'something is wrong', that's often grounds for performing a thorough operational assessment.

**Reason #2: Some relatively dramatic events have occurred recently.** For example, a new product success has dramatically increased customer support volume and calls and emails are going through the roof. The company will need to make some dramatic adjustments to keep up, and it wants a thorough assessment before taking action. Another scenario is that a merger or acquisition has resulted in multiple support groups. Management may want to evaluate whether it would be more effective to continue to run separate operations or whether it would be more efficient to consolidate them. And if it's determined that the operations should be consolidated, they must decide at which location they should be based (It doesn't always make sense to bring everything to headquarters). Therefore, big changes in the business are often the catalyst for an assessment.

**Reason #3: The company or the support organization is planning to embark on a 'major event' and they want to be sure that support is**

### in this issue

- > [Where Satisfaction Ends and Experience Begins](#)
- > [Breakthrough Knowledge Management](#)
- > [Get Ready for SaaS 2.0](#)
- > [Have You Scheduled your Annual Check-up?](#)
- > [Understanding Channel Segments](#)
- > [Can TS and PS get along?](#)
- > [Structured Problem Resolution](#)

**prepared.** Examples include plans to implement new CRM, a knowledge management system (KM), or other technology. Or the company has plans to alter their service offerings, and they want to understand if the organization is prepared (or what changes will be necessary). It could be that the 'major event' is the launch of a new product that is expected to create increased demand or different demands on the service organization. Any upcoming major event could be justification to evaluate the organization's preparedness. This is similar to getting a physical before you sign-up for that triathlon!

**Reason #4: The company has made major technology investments (e.g., CRM, KM, self-service) and has not achieved the expected benefits.** I've often heard, "We spent all this money on the 'best tools' and things haven't really changed!" That's a signal that there is some underlying issue that hasn't been addressed and the company is making attempts at 'fixing the wrong problem' (i.e. throwing technology at a flawed process). When you don't get the expected ROI after implementing tools designed to improve performance, it is probably worth conducting a deeper analysis to identify the real problem.

**Reason #5: The company has specific questions and wants an outside opinion on issues.** Are there any major opportunities for improvement that we haven't identified? Are our processes optimized? Could we reduce the support burden by implementing web-based self-service or other tools? Could 'outsourcing' reduce our costs and/or improve performance? Should support be re-located to a lower-cost area? An objective evaluation of your operation can identify specific areas for improvement.

Keep in mind that the circumstances for your company will be different each year, and there are numerous approaches to having an assessment performed. There are some companies that have an outside expert perform an annual assessment as a regular course of business. Some prefer to bring in the same person every year because they believe there is value in the knowledge the outsider builds over time. I know one company that brings in a different outside consultant every year—sometimes even more than one in a year—because they want to get different perspectives. I think there is validity to both approaches and the choice boils down to personal preference. Either way, the motivation behind performing an annual assessment is the same. These companies want to identify issues before they become big problems, and they want to proactively improve performance and prepare for the future.

No matter what problem or situation generates your interest in going through an assessment, there are a few things that you should consider. An assessment should describe the strengths and weaknesses of the current operation and specifically describe opportunities for performance improvement. Make sure the assessment doesn't only point out symptoms — it must identify the 'root cause' of problems. A good assessment should benchmark your methods and performance metrics versus industry standards (not just the assessor's opinion!). Any

assessment should include specific recommendations for achieving your goals or resolving issues.

It is also important to note that companies don't generally choose bring in an outside expert due to lack of confidence in the existing management. In fact, more often than not, it is the existing VP or Director of Service/ Support that initiates the assessment process. A good senior manager will recognize the symptoms (signs that an assessment is in order). That same executive will often recognize that he just does not have the bandwidth to drill down to the root cause of the problems (a process that is likely to take 20+ person-days). What's more...it is difficult to view your own operation and people objectively. It's beneficial to obtain an unbiased, professional assessment of the current operation...then you can focus on fixing the issues.

**About Dave Brown.....**

*Dave Brown is president of Support Center University, a training organization that specializes in management development for service organizations. He is a management consultant, teacher, and author, and considered an expert in staff modeling, process improvement, and change management. Dave has 20 years of technology management experience (including Amdahl, Adobe Systems, and Broderbund Software) and over 10 years experience as a management consultant and trainer. Dave is the author of the book Optimizing Support Center Staffing , and has published more than 40 articles and papers related to improving support operations.*

*Dave will be conducting a training day on this topic at the SSPA Services Leadership Conference taking place Nov 12 – 14 in Washington D.C. Space is limited.*

**Click here** or call the SSPA at 858-674-5491 for more information.

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