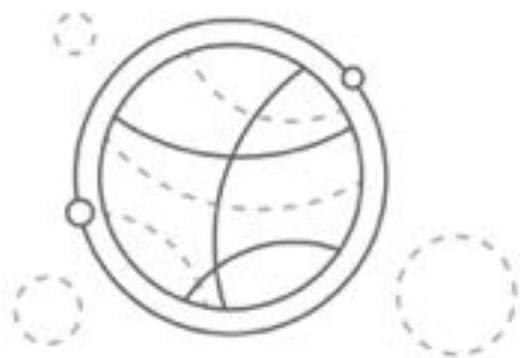


Excerpts from:

***Contact Center Management on Fast Forward:
Succeeding in the New Era of Customer Experience***
4th Edition

By Brad Cleveland



Contact Center Management on Fast Forward

Succeeding in the New Era of
Customer Experience

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CHAPTER 2:

The Blueprint— Your Customer Access Strategy

“If you don’t know where
you’re going, you’ll wind up
someplace else.”

YOGI BERRA

It could be that you have just a few people in a small company handling interactions with customers. On the other hand, you might have thousands of employees working across multiple sites. In either case—or any point in-between—you need a plan to guide the direction and development of your contact center.

In contact center terminology, a strategic plan is known as a customer access strategy. In this chapter, we’ll identify the customer expectations on which your strategy should be based. We’ll then turn to what a customer access strategy is, identify the components that make up an effective strategy, and look at some of the creative ways organizations are engaging with their customers.

But before we explore those topics, let’s answer the most basic question: What is a contact center?

What Is a Contact Center?

A prerequisite to developing an effective strategy is to decide that you need a contact center—or perhaps acknowledge that you already have one! Let's review what a contact center is and does, and identify characteristics that define all contact centers.

ICMI defines contact center as: “a coordinated system of people, processes, technologies and strategies that provides access to information, resources and expertise, through appropriate channels of communication, enabling interactions that create value for the customer and organization.” Okay, there's a bit to this definition. But there's also a bit (actually a lot) to contact centers—much more than casual observers may know.

It's often easier to explain what a contact center does than to define it. And great examples are everywhere.

Consider healthcare. In recent years, many hospital systems have launched contact centers. In their simplest form, they help patients reach the right department, doctor's office, or patient room. However, the more advanced centers—the kind I'm referring to here—provide a wide range of services, including medical advice lines, billing and insurance issues, physician referrals, even information and registration on wellness classes. All through this one resource.

| *It's often easier to explain what a contact center does than to define it. And great examples are everywhere.*

You can imagine the rationale these management teams think through before launch: Customers (patients) have thousands of questions a day. They contact different departments looking for answers, often reaching the wrong places. The employees in those areas don't have the time, training, or know-how to handle many of the misdirected inquiries that they get. In many cases, those handling contacts aren't sure where to send patients for the information they need, so they transfer them to other units or back

to a main switchboard. This dance wastes countless hours and frustrates everyone, employees and customers alike.

Then someone begins to ponder. *“What if we had a better way to handle all of these issues? We could train qualified professionals and give them access to the information they need. We’ll hire nurses to address medical-related questions. And we’ll put in a system for documenting contacts and logging critical data. We’ll develop quality processes for coordinating with the rest of the institution and safeguarding information.”* One day ... *voilà*, a contact center is born!

This whole sequence of events—beginning with someone envisioning a better way to serve customers—has played itself out many times in recent decades. All of today’s best contact centers started as an idea. Today, contact centers are part of every vertical sector of the economy, including commercial, government, and nonprofit. They can be found in organizations of all types, small and large.

This discovery process can also happen within organizations that *already have* contact centers. For example, the marketing department may respond to customer service issues that show up in social media channels. But keeping up becomes increasingly difficult, and a constant distraction from other work. Service to customers becomes hit-or-miss. The wise among them get together with their colleagues in customer service and come up with a plan to enfold these interactions into the contact center. They’ll let go of the work but establish good cross-functional collaboration with the contact center to ensure customers are being served well.

Characteristics of Contact Centers

All contact centers, small or large, share some basic characteristics. These include:

- Interactions are handled by a group of employees, not a specific person. (In other words, customers reach out to a service, not an individual.)

- Agents are cross-trained to handle a variety of contact types.
- Customer contacts are distributed based on agent availability and/or specific skills required.
- Agents have access to information on the organization's products, services, policies, and any other resources needed.
- Agents are empowered to make decisions and take actions for customers.
- Systems track information on the quantity and nature of contacts handled, service levels, customer information, and other aspects of service delivery. This data can be used for planning, as well as product and service improvements.

Even today, there are some people managing contact centers who don't know they are ... well, managing a contact center. It's a bit chaotic. Okay, very chaotic. But they and their teams do their best to manage variable workloads and meet customer needs.

One fortunate day, they'll run across a blog or be talking with a colleague. They will discover that contact center management is a profession. They may do some further digging and discover a bunch of resources that can help. They will find articles, conferences, and other professionals who also manage contact centers. They will realize—with great relief and excitement—*they are not alone!* If this describes you, and you've only recently discovered contact center management—welcome!

What Should You Call Your Contact Center? Your Employees?

While the term “call center” is still commonly used outside the industry and in mainstream publications, it has largely fallen out of favor with those in the profession. As organizations continue to transition centers once dominated by calls and email into omnichannel operations incorporating chat, text, video, social media, and other types of contacts, many feel that “contact center” (spelled “contact centre” in much of the English-speaking

world) just makes more sense. And that is the term I use throughout this book. But you'll find other variants, including:

- Customer care
- Support center
- Resource center
- Customer service center
- Customer experience team
- Sales and support
- Technical support
- Help desk
- Information line
- And others

There are also terms specific to some industries, such as reservations center (travel), hotline (emergency services), and trading desk (financial services). And some organizations create their own terms, like the “Customer Loyalty Team” for online retailer Zappos, or “AppleCare” for the computer company.

Similarly, there are many terms for contact center employees: agents, customer service representatives (CSRs), customer care representatives, associates, consultants, engineers, and others. Some organizations refer to their contact center employees as customer advocates. (I like it!)

My advice is to use terms that fit your organization's personality. How you refer to your operation and employees can make a difference. These labels become part of your team's brand—they influence how colleagues and customers see you. So go for something inspirational!

Customer Expectations

Contact centers are all about enabling organizations to meet customer expectations—to be there when needed and with the services needed. But

wait ... aren't expectations always changing?

Yes and no. Customer demands *are* constantly evolving because improvements in service reset their expectations at new levels. While customers initially appreciate good service, they quickly get used to and expect it. Additionally, the experiences customers have with *any* organization—not just yours or your competitors'—help shape their perceptions. So, organizations that are driving service innovations are upping the ante for all others.

The good news is, zeroing in on customer expectations is not the hit-or-miss proposition it may appear to be. ICMI has researched this issue for nearly three decades and has found ten customer expectations that consistently emerge:

TEN KEY CUSTOMER EXPECTATIONS

(no specific order)

1. Be accessible
2. Treat me courteously
3. Be responsive to what I need and want
4. Do what needs to be done promptly
5. Provide well-trained and informed employees
6. Tell me what to expect
7. Meet your commitments and keep your promises
8. Do it right the first time
9. Follow up
10. Be socially responsible and ethical

The key is to keep tabs of what these expectations mean to customers. For example, there was a time when *being accessible* simply meant having a call center, a toll-free number, and reasonably well-trained agents. Today, there are many access alternatives, and customers expect to reach you

easily and intuitively (they don't want to think about channels). Customers expect service that is easy to use and consistent across all touchpoints.

While *courtesy* used to refer primarily to the way agents interact with customers, the definition today is much more ingrained in systems and processes. Don't make customers repeat the same information or reexplain the background of an existing service issue. Don't transfer them around or place them on hold for too long. And put your contact information where customers can easily find it. Sure, it's as important as ever that your agents are courteous—but there's a lot more to it.

Definitions of *responsiveness* and *promptness* are also evolving. As one example, email response times have gotten far better in recent years—from several days to a matter of hours in many organizations (see Chapter 4). In fact, some organizations are staffing for email like they do calls or chat and handling them as they arrive. Similarly, more organizations all the time are handling time-sensitive social media interactions as they occur.

Another customer expectation is that the organization will staff the contact center with *well-trained and knowledgeable agents*. As a rule, contact centers are handling more complex issues, through more channels and from customers that come from increasingly diverse backgrounds. Robust self-service capabilities are handling a deeper range of issues, leaving your employees with the most complex interactions. Successful contact centers are rethinking and upgrading recruiting and hiring practices, the training they provide to agents and managers, and the tools and processes they put in place.

Tell me what to expect. Meet your commitments and keep your promises. Do it right the first time. Follow up. These expectations are interrelated and require that people, processes, and technologies work together. The promises your organization or employees make must also be backed up by other departments. Customers live by the mantra “trust but verify”—they'll trust your organization if you hold up your end of the bargain.

Be socially responsible and ethical. Lapses, or even perceived lapses, in ethics or social responsibility quickly make the rounds with customers and your own employees. Ethics and responsibility are the concern of the entire organization, but as a hub of communication, the contact center is inherently involved.

In short, anticipating customer expectations is essential to developing effective services. In fact, customer expectations ultimately define what good service means. Truly understanding your customers can help you stand out in an environment that evolves every day.

So, how do you ensure customer expectations are built into your plans and direction? Let me make some recommendations:

- First, make sure that your team thoroughly understands these ten basic customer expectations. Post them prominently. And make a habit



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of considering them when making decisions. (I recently visited a client that showed me how they had prominently posted them in their conference room—bravo!)

- Build cross-functional teams to ensure a common focus on customer experience. The contact center cannot single-handedly meet expectations—it takes systems, processes and focus spanning all functional areas.
- Don't guess at how you're doing. Track customer perceptions through social media channels, during interactions with agents, and through surveys that provide input on how well you're living up to their expectations.
- That said, remember the late Steve Jobs' advice: customers don't usually know what they want until you show it to them. If you want to differentiate through service, don't just copy industry "best practices"—be bold and create services that are appropriate for your organization and brand.
- Finally, ensure that customer expectations form the context in which you develop your customer access strategy—the topic we'll turn to next.

Shaping Your Strategy

At some point in developing customer services, the need for an overall plan becomes very obvious. So many decisions—do you add this channel, do you support that service, and many others—are interrelated.

You need an effective strategy. Otherwise, you'll be winging it—and wasting lots of time and resources.

Vision

I recommend beginning with your vision—where do you want to go? A customer service vision helps define the type of service you want your organization to deliver.

A common mistake I see, and one you'll want to avoid, is coming up with an overly-generalized vision or mission. For example, "we put customers first," or "we deliver world-class service" are so generic and uninspiring that they really don't help much in guiding decisions.

Vision can be represented as a vision statement, a mission statement, a set of values, or some overarching principles or standards. I love outdoor equipment and services retailer REI's mission, which also serves as its customer service vision: "We inspire, educate and outfit for a lifetime of outdoor adventure and stewardship." What great direction this short statement provides, even to the newest employees!

USAA, the highly-rated insurance and financial company, operates around four core values (which are really just four words): Service. Loyalty. Honesty. Integrity. Together, they are simple, clear, and inspiring. And they pack a punch because at USAA they discuss and include them in decisions every day. That makes a real difference.

If your organization has a vision that is too generic or that doesn't help guide those delivering service, you may want to create one that's specific to your contact center. Just make sure it's complementary, cautions consultant Todd Gladden, part of an ICMI team that advises organizations on their strategies. "Have a 'line of sight' linkage between the contact center's vision and strategy and how they support the overall vision and strategy of the company. The tie-in should be clear—and will prevent conflicting agendas as tactics are implemented."

My advice for you and your team, when creating your vision (and I'll borrow from the popular refrain): go big or go home. Come up with something that both inspires and recognizes the enormous potential of your organization and contact center.

Components of a Customer Access Strategy

A customer access strategy is "a framework—a set of standards, guidelines

and processes—describing the means by which customers and the organization can interact and are enabled to access the information, services and expertise needed.” It is the overall plan—the blueprint—that guides the development of your contact center.

A customer access strategy is a framework—a set of standards, guidelines, and processes—describing the means by which customers and the organization can interact and are enabled to access the information, services and expertise needed.

As with an organization’s overall strategy, a customer access strategy can take many different forms. But effective plans cover, in one way or another, these essential components.

COMPONENTS OF A CUSTOMER ACCESS STRATEGY

- Customers
- Contact types
- Access alternatives
- Hours of operation
- Service level and response time objectives
- Routing methodology
- People/technology resources required
- Information required
- Analysis/improvement
- Guidelines for deploying new services

CUSTOMERS:

This part of your strategy should summarize how customers are segmented (e.g., by geography, volume of business, level of service pur-

chased, unique requirements, or other characteristics) so that you can shape specific services that are just right. Customer segmentation typically comes from the organization's marketing strategy. However, given the operational requirements of serving different customers appropriately, I've noticed that contact center managers are increasingly involved in this effort.

CONTACT TYPES:

This step identifies the major types of interactions that will occur (e.g., inquiries, orders, support). Think through how each type of interaction could improve customer loyalty and build value. For example, some you'll work to eliminate (through improved products and services), some you'll want to automate through self-service, and some will best be served with the involvement of an agent.

ACCESS ALTERNATIVES:

This step—where strategy really begins to hit home for contact centers—identifies all of the possible communication channels (phone, chat, email, social media, text, video, face-to-face, self-service, customer communities ... the lot) along with corresponding telephone numbers, web addresses, email addresses, social media usernames, IVR menus, physical addresses, etc. Where more than one channel is involved in an interaction (say, when a customer begins in an app and has a conversation with an agent) define as many possible combinations as you can.

HOURS OF OPERATION:

This part of your strategy defines appropriate hours of operation. These can vary for different contact channels or types of interactions. Generally, self-service applications will always be available. Some agent-assisted services may be available 24/7, while others may have more limited hours. For example, customers can report emergencies such as downed power lines to their utility any time of day or night, with general customer service (billing inquiries, etc.) available during the day.

SERVICE LEVEL AND RESPONSE TIME OBJECTIVES:

This step summarizes the organization's service level and response time objectives (see Chapter 4). Different objectives may be appropriate for different types of interactions, contact channels, and customer segments.

ROUTING METHODOLOGY:

This part of the plan covers how—by customer, type of interaction and access channel—each contact is going to be routed and distributed. While these terms have inbound connotations, this also applies to outbound; for example, when the organization originates the contact, through which agent group will the contact be made?

PEOPLE/TECHNOLOGY RESOURCES REQUIRED:

This step transitions from “getting the contact to the right place at the right time” to “doing the right things.” Which agents or systems will be required for each customer segment and contact type?

INFORMATION REQUIRED:

What information on customers, products, services, and policies will need to be accessible to agents and customers? What information should be captured during interactions? How will the organization meet applicable privacy or reporting requirements?

ANALYSIS/IMPROVEMENT:

This step defines how the information captured or created during contacts will be used to better understand customers and to improve products, services, and processes. You may also want to summarize major performance objectives and how the contact center's value and contributions will be measured (see Chapter 12).

GUIDELINES FOR DEPLOYING NEW SERVICES:

Finally, your plan should outline a framework for deploying new services, including technology architecture (corporate standards and technology migration plans) and investment guidelines (priorities for operational and capital expenditures). This step should also describe who will keep the

customer access strategy current as services evolve: who has overall responsibility, how often the plan will be updated, and who has ownership of individual components.

What Does a Customer Access Strategy Look Like?

Customer access strategies are like business plans in that some are well-documented and others exist only in pieces and in the heads of various managers. Too often, the latter is the case. But there are standout examples of plans that are effective and up-to-date.

A mobile phone company that I have worked with has a well-organized customer access strategy, which lives on the organization's private intranet. It consists of a cleanly designed home page, the centerpiece, which provides links to each of the individual components. The links access files (databases, documents, etc.) that make up the different parts of their plan, such as customer segments, access numbers and addresses, routing diagrams, agent groups, hours of operation, service level objectives (and so forth). There are also links within these areas that allow you to logically move to others—but the home page will always get you back to the main directory.

The most impressive aspect of the plan is that it lists who is responsible for keeping the overall plan current, and the individuals who have ownership over various components, including marketing (customer segments) and IT/telecom (routing schematics). Each document has an “updated on ___” date notation. The plan is current, and they don't make major decisions without referring to it.

Questions Your Customer Access Strategy Will Answer

Your customer access strategy will be a guide that you can use to answer many important questions. For example:

- How should your contact center be organized (e.g., how agent groups should be structured)?
- If you add or improve integration of an access channel, what is the impact on other components and resources?
- What kinds of skills and knowledge will your agents, supervisors and managers need? How should your hiring and training practices support these requirements?
- What system capabilities best support your strategy? Do you have what you need in-house or will you need to build, buy, or contract for required technologies?
- What kind of processes best support your plans? Where should they be refined or restructured?
- Is it feasible or advisable to outsource some or all of your contact center services? (If so, the customer access strategy is still the responsibility of the client organization.) What capabilities must the outsourcer have to support your requirements?
- Can contact center strategy help shape the organization's strategy (e.g., by helping to differentiate the organization's services)? Are the organization's overall strategy, contact center strategy, and the realities of budgets and resources in alignment?

With new ways to communicate and connect emerging by the day, the sky is the limit! As you make decisions, keep your customers' needs and perspectives front and center. Customers don't think of contact channels or departments. You don't hear a customer say, "I'm going to contact XYZ's contact center." They say, "I'm going to contact XYZ." To them, the contact center is the company. The best managed organizations know this, and they cultivate strategies that enable their brands to shine through.

“PLAYBOOK” AT THE UNIVERSITY OF CALIFORNIA

Does a customer access strategy sound like something that would be nice to have? Actually, it's vital. Just ask anyone who's part of the University of California's Retirement Administration Service Center (UC RASC).

The University of California is the world's leading public research university system, with ten campuses, five medical centers, three national labs and a network of researchers and educators. The RASC provides retirement administration services to professors, administrators and others who are part of the university's retirement plan—more than 130,000 active members, as well as thousands more who are inactive vested members or retiree health enrollees.

Ellen Lorenz, Director of UC RASC, shares, “The more we worked on our customer access strategy, the more excited we got about it. It has become a tool that all of us within the RASC use and reference. It gives the team a strategic view of why we do what we do—a view that doesn't get lost in day-to-day activities.” Many RASC employees provided input into shaping the customer access strategy, which the team now refers to as the “Playbook.”

The Playbook has brought many benefits: better focus on priorities; teams that are increasingly self-directed; and projects that come in on time and within budget. It even helps RASC employees envision and develop their careers.

And the most exciting benefit? The University of California uses the RASC as an enticement to attract some of the best professors, doctors, researchers and specialized talent available in the global market. “Our customer access strategy has helped our contact center become a strategic asset,” says Lorenz.

Make It Yours!

What access channels should be opened up? What's the nature of service you intend to provide? Beyond applying the sound management principles we'll be looking at throughout the book, these decisions are yours to make. My overarching advice: Make your customer access strategy uniquely yours—do what's best for your customers and your organization.

Here are some examples of how customer access strategies are playing out:

- London-based Barclays bank offers video banking, allowing customers to chat face-to-face with a representative from their smart phone or tablet. The service is available 24/7, and offers support on a wide range of services.
- 1-800-Flowers (1800flowers.com) is the company name, phone number, primary URL, and (you guessed it) address for Twitter, Facebook, and other channels.
- Discover Card enables customers to reach agents through in-app messaging, among other channels. Unlike conventional chat, which requires customers to stay connected until a problem is resolved, customers can respond to agents when they choose without having to start over on an issue.
- Dyson puts its toll-free number and website address right on its vacuum cleaner handles—clearly visible to anyone who uses the appliance.
- Intuit's Accounting Professional Division developed a vibrant customer community, easily accessible directly through their accounting software programs; users help each other with most questions, and contact center agents have become facilitators and problems solvers for issues requiring the company's involvement.
- The National Cancer Institute in the U.S. uses Facebook Live Events to reach out to patients and their families with information and support.
- Square, Dell, and many other companies that provide involved technical support have embraced co-browse capabilities, which have boosted quality and customer satisfaction, while reducing handling times.
- Gucci, the luxury retailer based in Florence, Italy, is opening six contact centers in sites that include Florence, Shanghai, New York, and other regions, to (in the words of CEO Marco Bizzarri) give customers

“a direct connection to the Gucci community that is seamless, always accessible, personalized experience.”

You get the idea here—these are just some of many examples I could cite of strategies that came about thoughtfully. Observe the organizations you most enjoy doing business with, and you’ll notice the best deliver services in ways that meet customer needs while complementing their own brands and cultures.

Given the many ways to interact, a smart practice is to create an easy-to-find online listing of access alternatives. Do a search on “how to contact [Schwab, KLM, Apple]” and you’ll see good examples of the primary ways to reach the organization. From landing pages that list contact alternatives, some organizations provide templates for entering product numbers, serial numbers or customer information that leads to more accurate routing and customized services.

Studies show that when problems get serious, customers (yes, of all generations) overwhelmingly want to interact with a human. Companies that make their contact information hard to find (usually in an attempt to minimize costs) are asking for trouble. A search will usually pull up other sources—blogs, customer communities, and sites such as GetHuman.com—that provide tips for reaching the organization. These can include contact numbers, advice on navigating difficult menus or (when the company is perceived to be purposely hard to reach) direct contact numbers for executives or administrative offices.

Here’s a final recommendation: Be sure to provide an acceptable basic level of service (through good resource planning, a topic of later chapters) across all of your access channels. The best plans go awry when customers get frustrated and begin intentionally selecting the wrong menu choices or using access alternatives for other services, just to reach a person.

Clearly, developing an effective customer access strategy is not something you throw together during an afternoon team brainstorm (though that can

certainly give the creative part a push!). It takes leadership, persistence, and participation from across the organization.

But the payoffs are huge. From a customer's perspective, a good strategy will result in simplified access, more consistent services, and a high degree of convenience. From the organization's perspective, the benefits translate into better decisions, services that are more effective and efficient, and a dependable framework to guide developments.

Points to Remember

- All contact centers share basic characteristics—for example, interactions are handled by a group of employees rather than a specific person, agents are cross-trained to handle different contact types, and they are empowered to take actions for customers.
- Customer expectations are constantly evolving because the experiences they have with any organization—not just yours or others in your sector—help shape their perceptions.
- Ten basic customer expectations consistently emerge from customer feedback and surveys. Defining what these expectations mean and building a customer access strategy around them is an important and ongoing responsibility.
- A customer access strategy is an overall plan that guides contact center developments and decisions. Your strategy should be appropriate for your customers and should reflect your organization's unique brand and personality.