



Making the Complex Simple

Efficient and Effective Contact Center Growth

By Theresa Hull-Clarke & Rick Glew



Customers and business leaders alike demand a great deal of contact centers, which cannot easily be met using the simplistic approaches used to develop early, isolated contact centers. In order to provide a top-shelf customer experience, contact centers must adopt sophisticated processes which can evaluate and route calls quickly and effectively to the right agent, and which schedule agents based on their abilities as well as predicted call demand. Examples of Bell Canada Enterprises' contact center transformation are used throughout to demonstrate how companies can improve customer service while lowering operating cost by integrating disconnected contact center operations.

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In an ideal world, contact centers would run with clockwork predictability. Calls would come in with perfect regularity, one at a time, with no overlap, and omniscient agents would answer every inquiry quickly and accurately. The real world is a much more complicated place, with customers who have complex needs which rarely fit into just one or two neat categories. Of course, your customers have little sympathy for your travails. They expect a quality experience each and every time they reach out to your agents. Your challenge is to keep the complexities of your contact center from becoming a fragmented, disjointed collection of ringing phones, ensuring that each connection is a productive, satisfying one for both the customer and the agent.

Transforming the Operation

Running away from complexity is not an option. A simple contact center cannot meet the demands of a modern contact center to be efficient and consistent. Nor can a simple contact center successfully manage the multiple channels and blended inbound and outbound communications which are vital to good customer relations in a supremely connected world. And simple contact centers have no hope of evolving beyond its roots as a cost center into a strategic contributor to bottom-line value and an organizational model of excellence. These accomplishments require sophistication, and sophistication requires diversity, flexibility and a wide base of knowledge.

But complexity need not be complicated. The diverse needs of your customers and the demands of your company's range of products and services can be brought under control to create a contact center that is both effective and optimized, without sacrificing the hard-earned trust of either customers or employees. Bell Canada Holdings is just one of many companies that has committed to transforming a fragmented, complicated operation into an optimized, multi-functional contact center, after recognizing the inefficiencies of functional silos.

Each center had selected its own operating platform and approach to workforce management, robbing the organization of consistency and uniformity. Like many companies in Bell Canada's position, the costs and inefficiencies became intolerable, so Bell Canada committed to a long-term integration plan. Integrating fragmented call center operations into a sophisticated, modern contact center is necessary for any business that wants to understand the true impact of the customer relationship with the face of the organization. Through integration, it becomes possible to improve the way each and every agent can quickly and knowledgeably respond to any customer demand.

Callers expect three things from your organization—to be helped promptly, knowledgeably, and passionately. Fail to deliver on these expectations and you risk sacrificing your entire brand image in your customers' eyes. Therefore, it is imperative to keep complexity from sabotaging your ability to deliver a quality customer experience. Quality is meaningless without consistency, and a diverse contact center cannot deliver consistency without the ability to accurately assess the past and build operational forecasts for the future.

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Workforce Management: The Cornerstone of a Successful Operation

Just as a tiny stone in the center of a pond can ripple all the way to the banks, minor scheduling inefficiencies can sink a contact center's operational plan. A robust workforce management solution should be at the heart of the forecasting process, but it is equally important to ensure efficiency in the workforce management function itself. Bell Canada recognized that it had 50 workforce management staff scattered across 15 offices, each focused on different contact centers in stand-alone lines of business and each using a different set of planning tools. By better defining the workforce management role and introducing a uniform set of tools and procedures, Bell Canada transformed its workforce management jobs.

Rather than relying on manual labor and guesswork, Bell Canada's workforce planners now have crucial, up-to-the-minute insight into the state of the company's agent workforce and call demand, leading to more accurate plans and better intraday changes. By training to common tasks and shared goals, Bell Canada's workforce specialists became capable of managing agent requirements outside their home centers as well as seeing and understanding the activities of their workforce management peers. This gave Bell Canada a unified customer service planning function for the first time in its history—a milestone in its contact center integration. Now Bell Canada's professional planners can respond to peaks and valleys immediately, cutting reaction time from as much as four hours to no worse than a half-hour interval response. This enables Bell Canada to reallocate the agent pool exactly as customer demand requires.

Focus on Key Customer Demands

Once your forecast and schedule delivery processes are up to speed, you can focus on the three key customer demands. The first, speedy service, starts with an accurate forecast. Depending on the size of the organization and the expectations of your customers, missing by as few as two agents can significantly undermine your service levels, and more importantly impact the customer experience of virtually every caller that day. To make those forecasts work, however, the workforce must be scheduled properly, and scheduled in compliance with outside rules such as union contracts and government service regulations. Each of Bell Canada's four lines of business, for example, has slightly different service level rules and guidance, some of which are mandated by government regulators. A unified queue must be sophisticated enough to recognize the priority of a customer on multiple dimensions, and route to the best available agent according to the unique rules affecting that particular call.

Effectively scheduling for a unified queue requires techniques such as flexible and rolling shift starts and stops, staggered breaks and lunches and the ability to quickly transition agents from off-queue activities such as training and post-call work back to live caller interaction. Adherence monitoring helps ensure that agents are truly contributing in the way the plan expects. Those are not characteristics of a simple contact center, but with the right processes and technology in place, implementing them will make achieving your goals easier.



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Make the Agent Experience More Predictable

Like many companies, Bell Canada had to manage agent anxieties as it migrated to longer hours of operation with more flexible scheduling and an increased focus on adherence. The key to securing agent buy-in was emphasizing that clearly defined scheduling is not used to complicate lives and monitor employees, but to make the agent experience more predictable and productive, with efficient windows for activities such as training and coaching which would minimize disruption by taking place during off-peak periods. Bell Canada also gained agent trust by pointing out that its new workforce management solutions enabled performance metrics to be analyzed more accurately from live results and objective peer group assessments.

Your agents may not all work under the same roof. Labor pool limitations, language requirements, hours of operation, acquisitions and a host of other reasons make it expedient for many companies to operate more than one contact center. Although it may seem simpler to operate each facility as an island, the fact of the matter is that an integrated, multisite contact operation makes far better use of available resources. Depending on your company's needs, it may be sensible to staff a full-service, top-to-bottom contact center in several time zones in a follow-the-sun model.

Companies with a heavy volume of simple, transactional inquiries often find it expedient to staff those entry-level seats in efficient geographies, while maintaining a highly trained, upper-tier pool of agents in another location. By incorporating daily simulations in the contact center forecasting and scheduling process, the flow of callers through the organization can be anticipated, and the right blend of skilled agents made available in multiple locations.

An early challenge for Bell Canada in this area was consolidating its view of agent skills and capabilities, which previously had been tracked and managed using rules local to their home contact center. Devising a common language and set of standards for agent skills and caller needs is a vital part of any integration plan because centers cannot share resources and demand until each agent's capabilities and activities can be understood by all participants in the customer contact process.

Operating with fewer call queues, but a unified pool of agents, gets customers to the best representative for the task at hand with the smallest amount of delay and fuss, regardless of location and without requiring clients to memorize a laundry list of contact numbers and different hours of operation. Bell Canada's requirements for multi-language operation and its wide customer footprint make multisite operation a natural choice. Even as it recently tightened up the linkages between its several contact centers in Ontario and Quebec, Bell Canada was able to identify opportunities to consolidate some locations.

By sharing call volumes among the remaining centers, Bell Canada can address all callers better and faster, whether they are repeat callers with a long-standing issue, or a "zero-out" caller who simply needs a quick fact from a helpful agent. And by evaluating caller priority based on IVR response and known data about the caller, Bell Canada can ensure that high-value customers who buy multiple products are not kept on hold longer than a customer with a balance inquiry about a single account. Customers who provide value expect to see that value respected in turn, and while recognizing that value is not simple, it is a powerful capability.

A Positive Customer Experience Requires Knowledgeable Staff

Accurate forecasting and multisite coordination can get a live voice on the line promptly, but without a knowledgeable agent, the customer experience falls short. Proper scheduling requires the right staff to execute the plan, and contact center agents can no longer be treated as completely interchangeable parts cut from the same mold. Customers are more demanding than ever, and the growth of self-help tools, IVRs and online research mean that someone picking up the phone to call your organization may well have a very complex issue—and asking customers to simplify their requests is not an option.

It is not enough to merely anticipate the breadth of your customers' needs. You must also grasp which agents within your organization are best suited to handle each call type. Building your operations around multiskilled agents allows the most efficient use of each active seat, permitting you to take advantage of the primary and secondary skills of your agents and route calls to the most appropriate agent to handle each call. This ensures both higher agent productivity and greater customer satisfaction.

Promptly pairing a customer with the right agent on the first call pays compound dividends. Bell Canada quickly found that skills-based routing reduces callbacks, which helps keep future call demand under control. First-call resolution produces higher customer satisfaction, and by resolving customer issues faster, Bell Canada can avoid longer service outages as well as the costly churn of displeased customers who could not reach a knowledgeable agent on the first try.

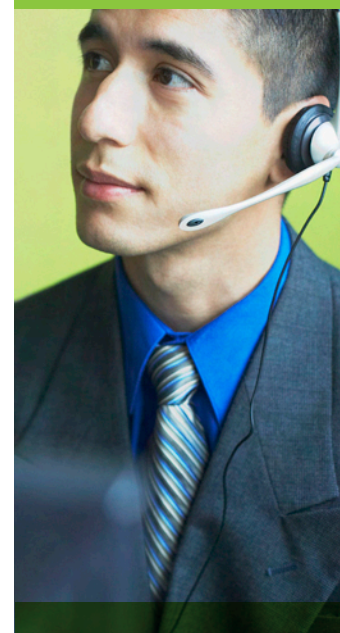
Using Workforce Management to Develop Multiskilled Agents

In order to ensure the best available agent, knowledge training must evolve as well. Used to its fullest potential, workforce management can be used in the development of multiskilled agent training plans, with just-in-time modules available directly at the agent's desktop, at the appropriate schedule interval. Managers and agents can work together to review organizational needs, quality monitoring, and performance management scores and create appropriate skill development tracks for the agents. Mastery of a new subject area can be easily incorporated in future multiskill scheduling plans, creating new opportunities to deliver the best service experience possible to each customer.

Bell Canada found a significant improvement in agent satisfaction when it changed from frantic, hurried training sessions which pulled agents off the queue with little to no warning to clearly scheduled training times, complete with interactive pop-up reminders.

Empower Agents with Self-Service Tools

The final component of a quality experience is a passionate workforce, starting with motivated and responsive agents. There are a number of intangibles in employee relations, from parking spaces to overhead lighting, but workforce management can play a significant role in tangibly improving an



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agent's quality of life, and by extension, their investment in exceeding customer expectations. Some companies have made the mistake of allowing complex operating procedures to bury the needs of their agents, stripping them of any voice in scheduling and planning and making them feel like a disposable cog.

Instead, embrace the possibilities a more sophisticated contact center presents. Advanced operating platforms open up new possibilities for clear communication and disclosure, along with enhanced schedule bidding, time-off requests which are governed by consistent and fair rules and opportunities for early departure and overtime which can be quickly communicated to the entire agent population. Self-service tools used for schedule bidding, preference changes and intraday alerts significantly empower your agents, which creates a work environment they help control, rather than simply react to. Increasing visibility into agent evaluation criteria makes it far easier to coach to quality metrics—agents are often ill-prepared to meet standards they are only occasionally informed of. Interactive scorecards make it easy for agents to benchmark their own performance and that of their team. Agents with ownership of their work environment can focus better on the job at hand, a quality customers notice.

Agent self-service is not only efficient and empowering for agents, but a boon to management as well. Too often, coaches and managers, who should be spending their time improving agent skills and enhancing the value the contact center can provide customers, are locked into endless cycles of paperwork.

Rather than sort through written time-off requests, reminding agents of scheduled training and coaching sessions, or mediating disputes over vacation rules and schedule trades, in a self-service workforce management environment, managers can focus on the goals, objectives, and results of their teams and focus on the quality of the customer experience rather than the minutia of building and adjusting an agent scheduling plan. Now that Bell Canada's team managers can get an at-a-glance view of agent performance and adherence from their desktops, they are better able to target their attentions on the floor to the right agent, rather than simply taking a walking tour.

Not being burdened by paperwork, managers are far less likely to have to turn away an agent's question or comment by "being too busy." As a matter of company policy, Bell Canada rotates team managers through agent groups every 6 months, so the self-service historical research tools allow incoming managers to more quickly acquaint themselves with the habits and capabilities of their new team.

Achieve Tangible Results

After its workforce management overhaul, Bell Canada can now provide its agents with schedules 3 weeks in advance, a step up from the uneven days of old when schedules were provided as little as one week out. The company also provides a detailed performance metrics portal for agents so they can view their own performance and that of their team in real-time, rather than rely on infrequent and incomplete statistical handouts. The clear, concise scorecards and reporting make agent self-correction and peer motivation easier, as well as making the role of coaching and supervisory advice clearer.

Change is never simple, but it can be rewarding—Bell Canada's contact center transformation has produced a long-term ROI of over \$4 million.

Whether it is corporate performance, competitive pressures or merger activity fueling the expanding needs of your contact center, change and growth should not be feared. Change is never simple, but it can be rewarding—Bell Canada's contact center transformation has produced a long-term return on investment of over \$4 million. By putting your depth and breadth to work for your customers, you can build a contact organization that is the envy of your rivals and a true asset in the eyes of both customers and the executive board.

About the Authors

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About IEX Corporation

IEX Corporation, a subsidiary of NICE Systems Ltd. (NASDAQ: NICE), is a leading provider of feature-rich, scalable workforce management software that enables contact centers to develop accurate forecasts and build efficient staff plans. Founded in 1988, Richardson, Texas-based IEX has a strong global market presence in over 50 countries with more than 900,000 agents in over 3,100 sites. IEX is part of the NICE family of companies, which offers the industry's broadest set of contact center business performance and analytics solutions. In addition to workforce management, the NICE product portfolio is comprised of quality monitoring, interaction analytics and performance management technology. These solutions address the entire spectrum of contact center business issues while supplying valuable strategic information to enterprise-level decision makers. For more information about IEX, visit <http://www.iex.com>. For more information about NICE, visit <http://www.nice.com>. ©2008 IEX Corporation. All rights reserved. IEX, TotalView, Webstation, SmartSync, eTrainer and InSight are trademarks, registered or otherwise, of IEX Corporation. Other names may be trademarks of their respective owners.