



Becoming the Best: Assessing your Front-line Operations

By Brian Hinton

The National Association of Call Centers | Volume 5, Issue 19, October 2, 2009

Third article in a series on assessments.

Our first two articles in this series defined a strategic context for a contact center assessment. Now we turn our attention to your front-line operations – the customer-facing function of your center. This area defines the service you provide to customers, the relationships you develop to solidify future revenue, and/or the direct revenue you generate. Well-conceived front-line process changes – even minor ones – can drive efficiency, improve service, increase revenue, and create synergies with the business strategy.

Defining the Scope of the Assessment

A front-line assessment covers two primary areas – contact routing and contact handling. It begins by considering the dimensions along which contacts are differentiated – by call purpose, product or service, customer segment, customer-specific data, agent skills, time of day, and/or other criteria. It traces the path(s) that each group of contacts takes. It considers all media types, including email, chat, and inbound and outbound calls.

Once the “who, what, why, when, and where” of routing are specified, the assessment proceeds with a thorough review of the handling process for each contact type, including the documentation and training – the “how.” Is the process clear? Is training sufficient for staff to execute each process efficiently, effectively, and consistently? Does the center reinforce processes through monitoring, reviews and metrics? Above all, are the processes aligned with the strategic triumvirate – business, operations, and technology? (See [NACC In Queue - Becoming the Best: Assessing your Strategic Alignment](#))

Other areas for consideration include self-service and its synergy with agent assisted calls, the center’s approach to process design and improvement, agent desktop processes, and messages that agents use to communicate with customers.

Operations Issues and Opportunities

We’ve noted some common themes when we’ve conducted assessments that include front-line operations. The quest for information on different contact types often drives centers to go overboard on call routing segments. They capture data through caller responses to menu options when they should use agent-entered codes or built-in logic in the desktop application. Multiple paths through the caller menus wind up routing to the same set of agents – a needless irritant for callers. Moreover, agents carry an excessive number of skills to ensure these over segmented calls get to them. It creates excess baggage in reporting and management and sub-optimizes operations.

On the agent desktop, multiple, cumbersome applications are often required for a single call resolution. Lacking integration, agents “wear out” the copy and paste command keys. It results in high call handle times, increased errors, and frustration for agents. Worse yet, the desktop may not provide ready access to information. This deficiency drives excessive transfers, long handle times, and needless escalations.

Another area to target is routing and handling multimedia contacts. Media silos are far too common. Customers have different experiences on different media channels with email a notorious underperformer



(manual routing, no tracking, and therefore no target response time). Agents have no visibility into other media – but they certainly hear about them! A better approach is to use skills for all media and route contacts using a multimedia routing engine. This approach ensures consistent handling and integrated reports which are crucial to planning and staffing.

We also keep an eye out for manual processes that drive inefficiency. Long hold times, long after-call work times, and agents out of schedule adherence are symptomatic of agents trying to keep up with burdensome manual processes.

Finally, it doesn't serve the company if the contact center runs like the wind but drops the baton when handing customers off to other departments. As such, the operations assessment needs to review *end-to-end contact routing and handling* for all media, including contacts that start in self service (IVR or web) and contacts that move on to other departments.

Apply Best Practices to your Front-line Operations

Best practices bring focus to an assessment and the action plan for improvement. Here are some of the hallmarks of a best-in-class center:

- Processes for contact handling are well defined, reinforced, and consistently executed.
- Center access (hours, numbering plan), contact routing (including menus/prompts), and skills consider customers first while balancing the needs of the business and the center.
- Processes are designed to ensure customer expectations are met and operations are efficient and effective. The end-to-end experience is considered, even when other departments play a role in addressing customer needs.
- Continuous process improvement initiatives are in place to ensure ongoing optimization.