



Becoming the Best: Assessing your Strategic Alignment

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Second article in a series on assessments.

In the first article in this series, we defined the importance and value of conducting an assessment and developing a plan to become a top performing center. This article looks at assessing strategy, the crucial starting point in charting your course to excellence.

Defining Strategy

An assessment entails a review of the strategic triumvirate – business, operations, and technology. First, understand the business strategy and drivers and their impact on the center. Look at your target market and customers, your organization’s strategic differentiators, the geography the company covers, and the mission, vision and values and what they reveal about the role of the center. Next, review the operational strategy, which defines the context for the processes, functions, and media the center handles. Finally, test the synergy of the technology strategy, encompassing architecture, applications, IT organization, and technology governance and support processes.

The contact center’s strategic options include channel choices, which define the use of media, and sourcing, which defines how you staff and how you procure technology. Site and disaster recovery plans, accountability and metrics goals, and the approach to and funding for budgets round out the key elements to consider. Strategic alignment of the business, operations, and technology strategies is the ultimate objective.

Why Assess Strategy

Strategy is probably the most important area to assess if you want to become your “best.” Strategy impacts and provides context for everything else. Further, strategy impacts all major decisions. Without strategic thinking, centers make tactical, isolated decisions, resulting in misalignment with the business goals and often needlessly high costs.

Most centers today would define themselves as a strategic part of the business, and likely have senior executives reinforcing this message. This positioning within the organization points to the importance of assessing and refining strategy. For centers to live up to this billing and its expectations, they must show their value by linking decisions to strategy. Clarity on strategy provides guidance for investment decisions, resulting in simplification of the budgeting process and greater ability to defend budget requests – argument enough for most centers to get on a path to strategic clarity.

Strategic Issues and Opportunities

When assessing strategy we commonly find some telltale signs that point to opportunities to improve. The first, and perhaps most concerning, is business, operations, and technology strategies that don’t fit together – or aren’t even clear. For example, we find metrics focused on cost control (handle time, number of calls per hour) but messages to the front-line staff to “build relationships and sell more...” That’s a strategic disconnect. Centers may be told that customer service is a strategic imperative, but then lack sufficient budget to provide great service, evidenced in understaffing, outdated technology, or no



backup plan. Another common issue is that no one can explain why the center (or IT) use outsourced staff, other than to say it was cheaper, or they wanted headcount off the books.

We often see centers that make tactical decisions without an overarching plan. For example, we've seen centers purchase technology solutions that don't integrate, adding tremendously to the burden of support staff. Or centers establish a text chat or email group that operates on a separate system, using separate people, with no plan to look cohesively at all media as part of the customer experience, or track and report effectively. An inability to assess the value or success of a change often accompanies these tactical decisions. Without a baseline, and without a means to measure the impact, skepticism builds among executives who feel their investments have not achieved the value promised.

Another concern is that the center impacts, or is impacted by, many other departments, but no one looks at the end-to-end customer experience. Excessive transfers or case escalations and low first call resolution are indicators of these issues. Centers with no routine communication with other departments, such as monthly meetings or assigned liaisons, raise flags. And lack of documentation or training on end-to-end processes serves as another sign.

Apply Best Practices to Strategic Planning

If these examples ring true to your center, you're ripe for an assessment. Any center conducting an assessment should apply best practices. Our mantra: *The Contact Center's strategy should align with and support the business strategy.* In order to achieve that state, consider these hallmarks of excellence:

- Business strategy is clearly defined, communicated, and understood by staff.
- Contact Center positioning in the corporation is consistent with its role in achieving business goals, and is well communicated.
- Relationships between the center and other parts of the business are appropriately defined and maintained.
- Operational practices are consistent with and contribute to achieving goals and include accountability, sourcing, disaster recovery, channel and self service strategies.
- Technology strategy is aligned with and positioned to enable operational and business success, and includes architecture, applications, sourcing, accountability, and governance.

The first article in this series defined the steps to assessments and planning. With this article providing some insights into the importance of, characteristics, and things to look for in strategy, you should be on your way to building a roadmap to success.