



Technology Optimization Part 1: Routing and Skills

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We have a wealth of technology in the contact center, but companies frequently underutilize it or poorly apply it to business needs. Now is a great time to review your deployments and find ways to optimize their business value – through technology, process, and/or people changes. With this column, we begin a series of articles that address technologies ripe for improved use. We start with routing and skills, technology that lets us do amazing things to deliver calls to the proper agent.

Many elements play a role in routing, including the network, IVR, ACD, and potentially CTI and databases. Centers need to review or define a call path carefully, end-to-end, to apply the technology properly. Skills capabilities allow agents to handle various call types and priorities, and conditional routing makes “if...then...” decisions for each call. Most centers focus on phone calls, but also “route” emails and perhaps fax, mail, or even text chat as part of contact handling. So as we look at routing and skills, we also need to consider it across media.

Many problems in contact centers are due to overly complicated routing and skills. Making skill structures too granular makes it difficult to effectively route, track, manage, and optimize. It puts customers through needless gyrations to call different numbers, navigate prompts, and bounce around queues. “Command center” staff move calls and/or agents around to try to match resources to workload, rather than letting the technology work on their behalf. And in the end, callers often end up in the same place in spite of all these efforts. At the other end of the spectrum, some centers suffer from overly simplified routing and skills. They put everyone into one bucket and expect their “super agents” to do it all. They wind up with a high transfer rate and low first call resolution.

Each center needs to strike the right balance, applying technology effectively to meet business needs. Here are some tips to optimize your routing and skills:

1. Keep it simple. Define end-to-end routing with the customer in mind and ease of management as a complimentary goal. Define channel use (toll free numbers) and prompts (whether in the network, IVR, and/or ACD) carefully to match skills while minimizing the burden on the customer. Define skills only to the degree needed for the call types - not for tracking, not because you *can* break it down that much. Finally, define routing paths with the right conditional options but not too many gyrations. You don't want “spaghetti routing” where you can't decipher what goes where (and why) or what works and what doesn't.
2. Use the technology. Set up appropriate conditionals and skills to find the best available resource – including looking at backup skills or other sites. Use a routing tool for email – whether it's a function of your ACD or CTI, or a separate email routing engine. You've got to be able to route, track, and optimize more than just phone calls.
3. Make changes when necessary, and with purpose and understanding. Part of getting routing and skills right is continuous improvement; few environments are truly static. Use your reports to monitor results, and analyze, assess, and optimize based on what you learn. (Stay tuned for our next column which will address reports)
4. Tie routing and skills technology into the process and people aspects as well. Training is key to aligning skills and contact types. You can use routing and skills to help define career paths and create opportunities – across products, customer types, media, or other dimensions.