VOLUME CHALLENGES? TECHNOLOGY CAN HELP

A look at the many ways in which technology is a resource for managing peaks and unpredictable volume.

By **Brian Hinton,** Strategic Contact

Contact Center

Pipeline

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www.contactcenterpipeline.com

Brian Hinton
Strategic Contact

T HE **"HAIR ON FIRE" DAYS** of alarms and emergency back-up staff running into the center to log into the ACD to take calls are gone. Workforce management systems and staffing strategies help managers plan for and react to variable contact volume. Yet even with effective planning, centers still struggle to handle unpredicted volume and peak volume periods. This article explores the many ways in which technology is a resource for addressing this troublesome operational challenge.
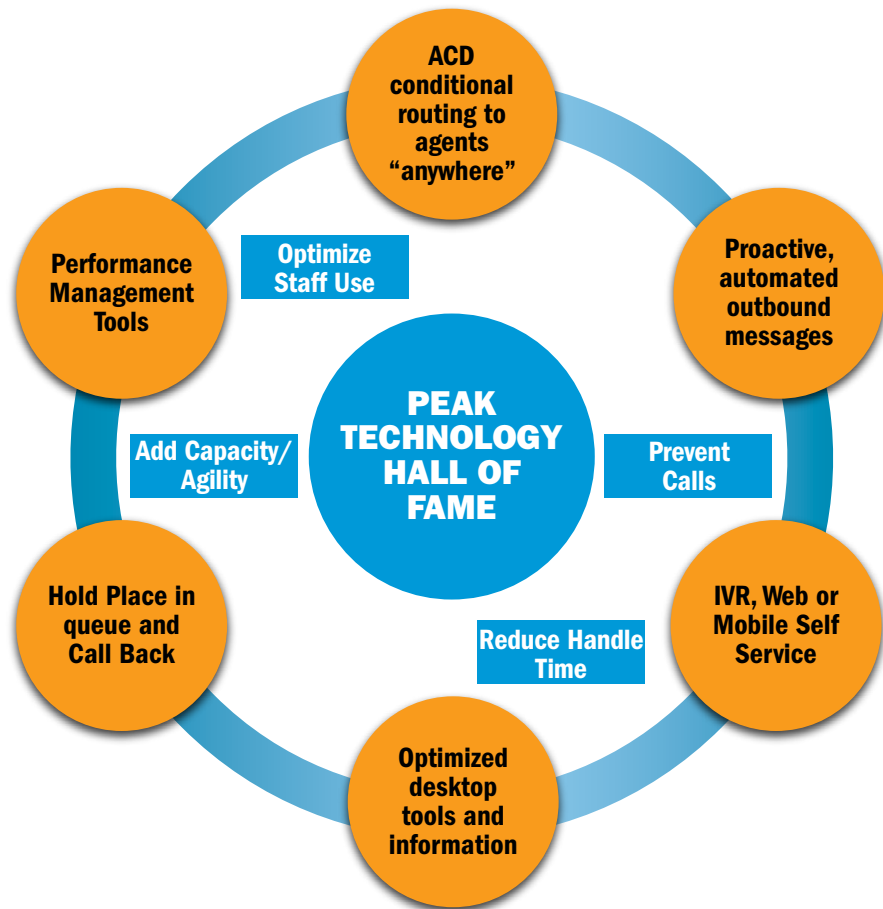
Develop a Multipronged Plan

The tools of the trade for handling large, unexpected volume and seasonal or otherwise routine peak volume include reducing agent workload, optimizing staff use, and adding capacity and agility. The operations plan to react to unexpected or peak volume periods sets effective goals, but enabling technology is essential for success. There are specific technology components to support every aspect of your operations plan.

REDUCE WORKLOAD

Reducing agent work is a matter of reducing the incoming volume, reducing the agent-assisted percentage of the incoming volume, and/or reducing the average handle time. Improving information flow to customers and agents throughout the entire sales and service process in every channel reduces the need for customers to contact you. **Automated outbound notifications and alerts** provide information your customers need before they have to contact you. There are several options for automated outbound notifications. Your CRM application can generate contact lists by applying business rules to account information fields. You can use these lists to launch email campaigns, outbound voice messages with IVR capability, text messages, and/ or posts on social media (e.g., Facebook, Twitter, user forums, etc.).

The company **website** can be a highly effective tool for reducing agent workload by providing pertinent information at the right time to keep customers from transitioning from web self-service to agent-assisted service. The key to its effectiveness is providing sufficient, easily accessible and understandable content at every stage of customer interaction. Work with customers to identify the services they want and need, and test your planned enhancements before, during and after release to ensure that they're getting the job done. Even if the contact center doesn't "own" the website, you have a high stake in its success so hold those who do own it accountable for performance that minimizes channel crossing to agent assistance. **Use web and post-call surveys** to determine why customers opted out of self-service to speak with agents. When assistance is necessary, offer **chat or web collaboration** to keep customers on the web and encourage repeat visits. Support web self-service, chat sessions or email web forms with **knowledge management** (KM) applications offering "does this help" FAQs and/or suggested responses to customers. As the KM responses are tuned and optimized, you can eliminate more and more agent-assisted contacts from the web. You can also add **videos** that describe your products or explain web processes.

Technology can help you contain inbound calls in self-service through effective use of **messaging**. An "emergency" notice or informative message on the front end of your routing lets callers know that you're aware of situations that prompted the contact or that it's a peak time. Many will hang up once they know you are addressing the issue or determine their need is not urgent so they'll contact you when it's not a peak. Dynamic messages in queues keep callers informed of wait times and offer alternate channels. Some might transition to the web or IVR to solve their problem. If they know you have a well-designed, robust **IVR**, you increase the odds that caller will choose that option when offered. If volume sometimes increases so high that callers hear busy signals, work with network providers to leverage service features that deliver informative messaging when defined thresholds are reached (or increase your trunking, if appropriate!).

Optimize Staff Use

Add Capacity/Agility

PEAK TECHNOLOGY HALL OF FAME

Prevent Calls

Reduce Handle Time

ACD conditional routing to agents "anywhere"

Performance Management Tools

Proactive, automated outbound messages

Hold Place in queue and Call Back

IVR, Web or Mobile Self Service

Optimized desktop tools and information

The Peak Volume Technology Hall of Fame is a good place to start to optimize your plan, **Figure 1,** *above*

Whatever you do, there will always be callers who require agent assistance. To reduce agent workload, focus on reducing handle time. Start by using ANI match or caller provided information in the IVR along with **CTI** to "pop" the caller account information. Screen pop can reduce handle times by tens of seconds by eliminating the need for manual identification and/or authentication. Improve the percentage of screen pop success by improving the customer IVR interface. Clean up the data used to identify the caller by encouraging agents to verify and update information on calls. Third-party services can also update and expand your customer contact database. Finally, let self-service account updates (e.g., on the web) help you to maintain your database.

Simplifying the agent desktop as part of overall process optimization will also reduce handle time. Use **quality monitoring** trends to identify process improvements offering the most "bang for the buck." Those same QM scores help identify targeted training needs to ensure that

TECHNOLOGY	PROACTIVELY PREVENT CALLS	REDUCE HANDLE TIME	OPTIMIZE STAFF USE	ADD CAPACITY AND/OR AGILITY
ACD		X	X	X
Callback				X
Chat and Co-browse	X			
CRM	X	X		
CTI		X		
Dialer	X			
IM		X		
IVR	X			
KM	X	X		X
Multimedia			X	X
QM		X	X	
Reporting/Analytics			X	
Training/LMS		X	X	X
UAD		X		
Videos	X			
VoC	X			
Web	X			
WFM			X	X

Summary of unexpected, peak volume technology and its use   TABLE 1, BELOW

agents follow your improved processes. Simplify desktop integrations and system navigations with a **unified agent desktop** (UAD) application or workflow tool that can automate manual processes and remove redundant tasks. Simplifying the agent desktop can also increase the number of contacts resolved at lower tiered support.

Equip your Level 1 agents with effective tools to reduce the requirement for higher tier support. **Knowledge management** tools with advanced search functionality, auto response to emails, response templates offering suggested responses and FAQs enable efficient agent responses to calls, emails and chats. Implement **IM** for real-time collaboration when Level 2 support is required to achieve a higher percentage of first-contact resolution.

OPTIMIZE STAFF USE
Erratic volume requires technology to support efficient staff use. Data-directed or **conditional routing** business rules optimize caller treatment from specific segments and/or account status (e.g., routing repeat callers to a message instead of an agent for a status update). Business rules also prioritize agent skills and provide conditional routing based on queue status, tying in with messaging as previously described. And given the potential for cross-over from non-real-time channels, you'll want a **multimedia routing** engine that leverages your business rules to meet various service level and response time commitments, and provides consistent reporting.

Besides channel and routing enhancements, optimize staff by expanding training options using

performance optimization suites with WFM, QM and eLearning to support scheduling flexibility (e.g., web modules, targeted, auto-delivery based on QA results, or self-paced). Integrate your QM application with WFM and the enterprise or contact center **learning management system** (LMS) to route targeted training modules during low-volume periods. Ensure that your WFM schedules multimedia skills based on volume and handle time data across media. Integrate reporting from all applications for a full understanding of real-time results and trends.

ADD CAPACITY AND AGILITY

Technology enables expanded contact-handling capacity and increases management agility in reacting to erratic volume by supporting flexible staffing models. Use **WFM** to align shifts with volume arrival patterns. Evaluate whether expanded hours will help spread the volume and eliminate voice messages and callbacks. Leverage flexible training options and knowledge aids (previously described) to make part-time and temporary staff economically viable while still adhering to quality standards. A remote agent program can drive scheduling flexibility into near real-time reaction but requires a **work-at-home technology** strategy that includes secure, high-speed data connectivity and a quality voice path.

It may be difficult to avoid using staff outside of the contact center as agents during high-volume periods. This strategy requires that you leverage desktop licenses, logins, "reserve" agent skills (e.g., backup, lower priority, easier contact type), alerts and work state policies. And, it requires that you have the processes and reinforcement in place to ensure those who don't routinely support contact handling are effective when they do. Defined notification processes and tools trigger the need for help, and clear definition of login and work-state policies, aligned with the proper conditional routing to overflow skills, will ensure success. Routing to reserve agents benefits from a **virtualized technology** environment with all staff, regardless of location (home, outsourcer, remote sites, etc.), on one technology platform delivering routing optimization and consolidated visibility to contact center management.

You can also flatten out spiky volume by adding **callback** functionality to your queue treatment. These solutions include messages about queue status, with options to wait or be called back. When your informed customer chooses to be called back, the system can capture ANI or another number they enter, hold their place in queue, and call back when it's their turn or at a scheduled time.

Optimize Technology Performance

Since technology is a key to your strategy for navigating unpredictable and peak volume, you must optimize its performance. To improve latency and overall performance, reduce the load on networks, applications and PCs where you can, and bolster capacity and processing speed where you must. Use hard phones rather than PC softphone applications for the voice path. Limit heavy load activity during certain periods (e.g., backups, daily batches, report generation, downloads, etc.). Maintain PCs on a regular schedule as part of your routine technology maintenance budget.

Defined SLAs are crucial to technology performance success. Set appropriate standards with IT and your vendors and hold them accountable by measuring mutually agreeable performance metrics. Establish development and test environments to minimize unexpected "glitches" when new releases go into production and for ongoing testing that can help avoid the double-whammy of technology issues during a peak.

Review your internal technology support process (e.g., ticket submitting and reaction) for:

- Response times
- Effective resolution processes and timelines
- Trending to identify larger issues
- Proactive monitoring and testing to avoid downtime or to speed reaction times

What's in Your Hall of Fame?

With so many possibilities, it may feel hard to know where to begin to use technology as an enabler for reacting to unexpected and peak volume. Figure 1, on page 3, emphasizes some "heavy hitters" that might be a good place to start. Table 1 summarizes the roles the various technologies can play. You should start by reviewing the technology you already have to see if you could do more—either with functionality or performance. With an effective operations plan and the right enabling technologies supporting it, you will succeed in responding to the realities of unpredictable and peak volume. ℗

Brian Hinton is the Principal Consultant for Strategic Contact.

✉ brian@strategiccontact.com
☎ (706) 310-0544

INTEGRATE THIRD-PARTY OUTSOURCERS

Many centers use third-party outsourcers for handling some or all contact types, so why not consider outsourcing as an option for reacting to erratic volume? With VoIP and virtualization, you can put outsourcers on your technology infrastructure (see "Technology for Outsourcing Agents," *Pipeline*, April 2010), including your routing and performance management applications. Don't just blindly dump calls to outsourcers hoping they can handle them. To maximize effectiveness, invoke business rules as you intelligently route based on availability at your sites and theirs. Outsourcers might be more effective than your "all hands on deck" with the right agreements. It can be a win/win as the outsourcer uses spare staff capacity and you get additional resources when needed.

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