



Peak Season Success Requires Planning

By Lori Fraser, Consultant

National Association of Call Centers | Volume 7, Issue 7, August 3, 2012

What do Olympic athletes and your contact center have in common? Finely-tuned bodies, focused minds, diligent training, the right support staff for training and competition, the best equipment the budget allows? The processes, products, and policies may differ (OK, and the bodies too!), but the need for peak season planning and flawless execution is common to both. A winning contact center strategy sustains or increases revenue, operates cost effectively (regardless of season), retains staff, and satisfies customers. Failure squanders opportunity, resources, and customer loyalty. As coaching great John Wooden said: "If failure isn't your goal, then it's time to prepare for success."

Get the Fundamentals in Order...

Just like Olympic athletes, it all starts with the basics. Focus on the fundamentals, and you've got a good springboard to lift you into peak season. The fundamentals focus on the most critical asset in your center – People – and how you manage them to peak performance, without neglecting other key enablers.

The basics start by knowing what matters to your company and customers. You need to establish appropriate individual, group, and center Key Performance Indicators (KPIs). Know what you are going to measure and how you'll get the numbers. Top centers don't deviate too far from their goals no matter what the volumes; they plan ahead so they reach their critical targets – in quality and efficiency – even when volumes are high. That's what sets them apart from their competition.

Basics include preparation for new front-line staff. Check job descriptions and process documentation, consider the "easiest" call types and routing and skills structures to match, and develop clear, targeted training for new hires. Peak season is not the time to "just wing it." Of course, those people need technology and facilities capacity too, so make sure planning includes IT and others.

Give careful consideration to your contact center support staff. You'll need to gear up your workforce management and quality assessment processes to handle extraordinarily volumes. Does your staff handle scheduling and real-time management effectively with regular volumes? Do they have a plan for life in the extremes? Are you checking internal (Quality Monitoring) and external (Voice of Customer) quality regularly to ensure that your reps adhere to your processes and policies *and* deliver the expected customer experience? World class centers keep quality monitoring and coaching *at the same level* even during peak season.

Let's not forget reporting. You need to know how the center is doing and how each individual contributes to the collective. Who's doing great? Who needs more coaching or help in order to handle their fair share during this busy time? Visible reporting, by role, is a foundational element.

... And Be Ready to Ramp Up

With a two- to ten-fold increase in volume, a lot of "moving parts" around the organization will experience strain. A good plan relieves the pressures and ensures that neither your staff nor your customers feel the pain. Depending on your resources, there are six functional areas to address to enable greater volume handling or minimize volumes agents must handle. Centers with limited budgets may only be able to consider temporary staffing options. However, depending on your budget and time to prepare,



there are additional options to proactively reduce inbound volume, reduce handle time, add capacity, and optimize technology use and performance. See the table for options to consider.

Options	Considerations
Proactively prevent calls or reduce inbound volume	<ul style="list-style-type: none"> • Add proactive automated outbound notifications or alerts - calls, emails, SMS text messages. • Add web chat and collaboration.
Contain calls or reduce agent volume	<ul style="list-style-type: none"> • Limit queues based on conditionals with dynamic messaging and options to help customers find alternatives at busy times. • Boost IVR self service through status-based messaging, additional self-service functionality, and improved user interface.
Reduce handle time	<ul style="list-style-type: none"> • Reduce transfers (within and between teams). • Shorten handle times through system efficiencies, process improvements, screen pops, or knowledge management tools, content and search functionality.
Add capacity and response agility	<ul style="list-style-type: none"> • Expand hours to minimize daily peak. • Implement estimated wait time and call back options.
Optimize technology use and performance	<ul style="list-style-type: none"> • Add intelligence to routing, using business rules based on customer information and contact type to tap the best skilled staff. • Add screen pops or increase screen pop percentage.

The most common option is to add more agents. This may be temporary staff, outsourcing partners or existing staff within the center and from other departments through “All Hands on Deck” initiatives to help with peak volume. More agents also means more coaches and support staff. While you may get off to a good start with early sourcing and hiring plans, don’t forget about your training room logistics and staff seating plan. You need a plan (by week) for how many agents are in classroom training, nesting training, and then productive on the center floor. *[Don’t forget about attrition!]* Map out your seating plan – by week, by day, by shift. Facilities limitations may force you to consider using home agents or outsourcing.

Coaching, QA, and back office roles frequently get overlooked in the staffing plan, compromising the customer experience and presenting bottle-necks to center efficiency and effectiveness. Experienced staff in the management, supervisory, and agent ranks may need to increase the amount of time they spend on the floor giving seasonal staff the support they need. Consider using subject matter experts as floor walkers to provide technical or process expertise to new staff. Your redeployed staff will need relief from other responsibilities during peak season; plan projects around your peak, delay other tasks or enlist other departments to assist with non-client facing tasks which must get done.

What’s your plan?

With the fundamentals in place and a solid ramp up plan, you can handle the peaks. To guide your thinking as you prepare for your upcoming peak season, check out *Peak Season Coverage “Best Practices.”*