

LEADING THOUGHTS



Real-Time Queue Management

By Tim Montgomery, The Service Level Group

Planning and access to the right information is the key to meeting customers' real-time service expectations.

Every call center is unique, but they all have a common thread — the way in which the work arrives. Calls appear in a continual, random pattern and must be answered within seconds of delivery. To address this challenge, many call centers have implemented creative forecasting, planning and scheduling processes. No matter how effective this process, at some point, the incoming calls will outweigh the workforce and calls will queue. Typically, this is when the fun begins and everyone's life seems to change a little. A commonly overlooked fact is that queues are part of the plan and not necessarily a bad thing. Unless you have a service level objective of 100% in zero seconds, you're planning to allow a certain number of calls to enter the queue. Managing queues is what your automatic call distributor (ACD) is designed for — it grabs those calls that can't be answered immediately and holds them until an agent becomes available.

An effective real-time queue management program is essential to running an efficient inbound call center, but it's often the piece that's left out of the planning process. Following are a few considerations for establishing or updating a real-time recovery program.

Continually Update Your Real-Time Plan

Your ability to institute a successful real-time recovery program starts with an effective planning and scheduling process. This process must include the

ability to look ahead to the coming week and identify the intervals that lack the minimum number of phone agents required to meet your service level objective. This capability is a common component of most workforce management systems and can be manually tracked via a spreadsheet or database application. If you do not have a process in place that allows you to look ahead and review staffing gaps by interval, you should implement one before moving forward with a real-time recovery plan.

Once you have a process that allows for ongoing staffing gap analysis by interval, it is important to keep it updated. If you create schedules several weeks in advance, they need to be continuously updated with all changes that will affect the number of employees planned for incoming calls. This includes changes to the volume forecasts, last-minute agent training/meetings, short-term disability, etc.

Last, and most important, your plan must be updated with the last-minute changes first thing in the morning (e.g., sick leave, broken-down cars, sick children, etc.). This will give you an accurate picture of the workforce availability and will provide you with ample time to review alternatives for any intervals that look hopeless. Your current day planning does not end after your initial morning update. Additional unexpected events will influence your workforce throughout the day and the plan must be adjusted

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accordingly.

Communicate Expectations to the Front Line

The key to a successful real-time recovery program is the communication of expectations. The first step is to develop a process of communicating the expected workforce variances and any last-minute changes to the plan. This can be accomplished by consolidating the expected workforce variances by interval for an entire week on one spreadsheet. The spreadsheet, along with the ongoing updates, could then be emailed or posted on an intranet site. Providing this continual “snapshot” of the workforce and workload distribution by interval will eliminate many of the queue surprises that tend to catch everyone off guard. If the snapshot shows fewer people staffed than needed to meet the minimum service level, the odds are that you’re going to have calls in queue and everyone should be prepared.

Once the plan is communicated to the front line, expectations should be clear as to what actions are to be taken. If you have cross-trained agents who can handle response time activities (i.e., email, fax), you may have them log onto the phone once your queue threshold has been exceeded. Better yet, in the intervals when the plan is at a significant deficit, you could have them log onto the phone in advance and avoid the painfully long process of driving down the queue. You’ll need to recover the time lost against the response-time activities and move phone agents into non-inbound modes during intervals when the plan illustrates excess capacity.

Don’t Base Actions on Static Numbers

Once you’ve defined and communicated the actions to be taken, you will need to determine when the program should be implemented and when to escalate to the next level. Using static indicators as criteria for implementation will result in over- or under-reacting in many cases. For example, let’s say the first phase of your plan is to begin when

your expected interval-staffing shortfall is at negative five. A staffing deficit of negative five will result in significantly longer hold times when the required staffing is 20 than it will when the required staffing is 40. Using a single number as your threshold tends to mask the urgency in your lower volume intervals. A good method for setting your proactive adjustment threshold is to use a percentage approach — plan to invoke different phases based on the deficit percentage and not a static number.

This same approach should be used for those intervals when the calls don’t arrive as planned and you need immediate help. You’ll first have to work with an Erlang program to get a feel for the “planned” number of calls in queue based on the expected volume for the time of day. Next, determine how long the threshold can be exceeded before enacting the plan. It’ll take a few attempts to get this right but, once established, it will definitely reduce the number of “hair-on-fire” events.

Monitor By Skill Group, Not By Team

Your real-time recovery program and ongoing gap planning should be done at the skill level or the highest level of group overflow. Managing this activity at a team level, when calls are shared with other groups or sites, becomes a coordination nightmare. This activity should be monitored at the same level in which the volume is forecasted — your schedules are created against this forecast, so all real-time updates and actions should follow the same process.

With the addition of new media, many call center agents have moved from call handling to other interactions, such as chat or email. In some cases, their workload has shifted to handling only the new media. It’s a good practice to keep an updated list of all people who have been trained in telephone skills and who can be called upon on short notice. You should also have an alumni list of people who have migrated out of the call center to other parts of the organization and who can be counted on during emergencies.

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Educate to Eliminate the “Attack the Queue” Philosophy

Queues are a necessary part of the plan to take full advantage of the efficiencies gained by implementing an ACD. As call centers evolve and establish service level objectives, rewards and punishments based on these objectives quickly follow. To ensure that these objectives are consistency met, many call centers establish what is best described as an “attack the queue” approach to meeting service level. When fully implemented, this approach has everyone in the organization panic-stricken when calls are in queue, and all other activities in the center are put on hold until the queue is driven down to zero. Typical results from this approach are higher-than-desired service levels, lower-than-expected workforce efficiency, agent and manager frustration and continuous non-telephone event rescheduling.

Overcoming this mindset is not an easy task, and to sustain it, you must have buy-in from the top of the organization. This requires educating everyone who influences the call centers results — from frontline agents to the senior executives. Don’t worry, you don’t have to train everyone to be a call center expert — a simple presentation that outlines what it means to work in a call center is a good way to get the ball rolling. One thing you should do before the presentation, though, is to develop a communication on your organization’s service level objective (e.g., definitions of the inputs, expected queues length, average answer speed translation, impact of one agent, etc.).

By making just a few changes to your real-time recovery program, many of the unpleasant tasks associated with running and working in call centers become much easier.

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Five Attributes of the Best “Real-Time Customer” Call Centers

Customers are now in control of business, and today’s call centers have the unenviable task of meeting and managing customer expectations that are moving at a lightning-fast pace. The shift in control began with companies’ increasing reliance on the Internet, which has given birth to a whole new host of customer complaint (and accolade) tools — e.g., blogs, audio files, YouTube videos and customer-powered Web sites that focus on satisfaction and dissatisfaction with specific products and services.

Many companies lack the ability to keep up with the new pace of change, and the old ways of establishing yourself as a service leader are no longer effective. What follows are ideas on ways companies can refocus themselves on the new “real-time” customer and use customers in new ways to provide the organization with valuable information on what’s really happening. By appreciating the real-time customer and understanding the right things on which to focus, companies can position themselves for success in this new era of service. Best of all, the call center is well positioned to be the key enabler of success in this new era of customer control.

1. They are proactive in providing resolutions — no complaint required. Let’s face it, most customer service activities are not generated by a customer that just wants to commend you for providing a wonderful product or service. The call center is generally the place the customer looks to for help with issues or problem resolution. Armed with this realization, the best call centers are finding new ways to get out in front of the issue — using real-time information to generate proactive resolutions. How? When you see trends from a certain customer profile, do something in advance. Don’t wait for an issue that impacts a small portion of your customers to become a problem for all of your customers. If you do, everyone will suffer because of the increase in volume.

2. They are focused on employee loyalty as much as on customer loyalty. It’s amazing how many times the same story gets written — happier employees provide better service. Unfortunately, many call centers forget this and spend their time focused on increasing customer satisfaction scores while trying to control the agent efficiency metrics. This often results in a vicious cycle that features a lot of finger-pointing with very little improvement in either customer satisfaction or agent efficiency; in fact, both often move in a negative direction.

The best companies treat the agent position with the respect it deserves — viewing agents as “voice of the company.” You have to spend the time understanding what your employees want. You’ll find that call center reps are pretty simple: They’d love to come to work and have some expectation of their daily workload, be provided the tools to be successful and have more flexibility. All this can be accomplished by moving from managing the queues to managing the process.

3. They are visual in their dedication to customer service and the people who provide it. Celebrating your wins is a key enabler to successful customer service. Call center agents have several “wins” every day that should be discussed,

documented and rewarded. It starts with helping agents to see things from the customer’s perspective, then, empowering them to make decisions and make a difference. Let agents know that it is okay to make mistakes as long as the best interest of the customer is the root cause. Be sure to reward the effort, and to share successes with others.

Meetings with agents are often driven by a new initiative or a desire to “educate” them on everything that has happened since the last meeting. A great way to create a “visual” dedication to service is to schedule quick daily or weekly “win” meetings, where the entire team can tell others about the wonderful things they did for customers since the last meeting. Everyone learns and starts to see the value of going above and beyond. The leadership team can reinforce this by making wins a part of their daily discussions — followed by rewards and celebrations. The best part for agents is that they’ll quickly realize they are in control of their own wins and that they have several opportunities to win every day. Everyone benefits — the agents, the organization and, most importantly, the customers.

4. They are in-touch with their customers’ real feelings and involve them in products and solutions. Top call centers pay more attention to what their customers are saying on blogs, YouTube, discussion forums, etc. These customers used to be dismissed as “complainers” and not the “target” audience; today, however, they are viewed as the real influencers. Their postings often point out the real problems and opportunities that don’t show up in customer satisfaction survey results.

One of the best ways to really understand how your customers feel is to send them a three-question survey: 1) What did you like about the last interaction; 2) what didn’t you like; and 3) what can we do better next time? Then, once you hear back from customers, follow up and do something... real-time.

5. They are fanatical about leadership and provide the tools for success. Call centers do a significant amount of internal promotion — moving agents into supervisor or management positions, but few call centers have the luxury of formal one-on-one development or mentoring programs to grow new supervisors. Most find themselves at the lower end of the maturity model — few people in the organization with a formal understanding of the foundational requirements of call center leadership, which makes it harder for new and upcoming leaders to gain a full appreciation of what it takes to effectively navigate the call center waters.

Every organization should develop a formal on-boarding program for new leaders — a plan that outlines the training programs, policies and evaluation criteria. By documenting the expected activities and holding monthly progress meetings, your new leaders will be engaged in the activity that makes every person (and organization) better — continuous improvement. Once you’ve done it just a few times, you’ll create the internal mentors with the expertise to transfer the right knowledge to your upcoming leaders.

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