*The Service Level Group's Better Contact Center Series*

# Real-Time Management Made Simple


**Authored By:**

**Tim Montgomery**
Principal, The Service Level Group
TimM@ServiceLevelGroup.Com
210-687-2714

Every call center is unique, but they all have a common thread – the way the work is delivered. Calls emerge in a continual, random pattern and must be answered within seconds of arrival. To address this challenge, many call centers have implemented creative forecasting, planning and scheduling processes. No matter how effective this process is, 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. When calls are in queue, the smiles are gone, the pizza gets cold, the bathroom passes disappear, and the executives start shining the bat signal from the 20th floor.

During my career, I've had the opportunity to work with numerous call centers and have witnessed the many ways companies react to queues. In most cases, this reaction often happens too quickly and is unnecessary. 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 percent 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 the 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 (i.e., 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 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, etc), 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 Set a Reaction Based on a Static Number*

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 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.

*Educate to Eliminate the "Attack the Queue" Philosophy*

As discussed earlier, 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 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/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 front-line 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 (i.e., 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.

## About the Author:

As a seasoned industry executive, popular speaker and highly regarded consultant, Tim Montgomery has guided thousands of contact center agents and leaders to improve individual and team performance, and exceed operational objectives. Drawing from these interactions and his extensive real-world experience, Tim founded **The Service Level Group** to help contact centers leverage the competitive advantages they have right at their finger tips. During his career, Tim has held a variety of leadership positions – everything from Call Center Manager to Vice President of Sales and Operations. His hands-on contact center leadership experience was fine-tuned by working for three of the most celebrated service companies in the world – **USAA, The Coca-Cola Company and The SCOOTER Store.** Prior to founding **The Service Level Group**, Tim spent three years as a Consultant, Seminar Leader, and Technology Advisor with **Incoming Calls Management Institute (ICMI).** Tim's expertise in customer service and contact center operations allows him to lead a wide range of consulting engagements for companies in a variety of industries. His consulting partners have included some of the most recognized companies in America - **AIG, Lifetouch Publishing, Mitsubishi Motors, Premera Blue Cross, Deluxe Printing, Allstate, Kodak, Liberty Mutual, Cinergy, Meguiar's and The Gartner Group.** Tim has written articles and whitepapers on a variety of management, customer service, and call center topics and has been featured in many global publications. Tim earned both his BBA in Accounting and MBA degrees from degrees from the University of Texas @ San Antonio. Tim can be reached directly at TimM@ServiceLevelGroup.Com



 