In-House Call Center

A Helpful Guide

This guide was not produced by Aikins Consulting. It is one example of many that can be found from performing a Google Search.

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STRATEGY

The nature of the interactions will have implications across all areas of the contact center including agent segmentation, routing, staffing requirements, agent qualifications, compensation, KPIs, and more.

Therefore, the first area to address is that of the strategic decisions from which many of the following topics will take direction, based upon these answers. In this area, you will need to determine the following:

LOCATION

Now that we've tackled all the tougher strategic questions, we can move down to more tactical areas like the location of this call center.

One way that modern technology has advanced the call center is in the ability to empower agents operating from anywhere with no loss of functionality and without the high costs of the past. This is a game-changer for the call center which traditionally was shackled to the corporate office. So, this opens up new questions to consider.

Questions to Consider

- Are you considering an alternative location from your existing operations? In a different part of the country that is closer to your customers? Or allows you take advantage of a different time zone?
- Will your organization benefit from more geographic diversity? A national footprint for coverage?
- Have you considered pursuing the labor pool in a different part of the country that offers you a whole new vein of talented individuals? Some organizations choose a location closer to colleges or areas of expertise for their industry. Or an area with a lower cost of living. Or perhaps where the accent and culture resonate better with your customers. This may even change your customer segmentation strategy to better align customers with people in their part of the country.
- How does this new call center link to your business continuity plans? Can you use it as an opportunity to improve your business continuity posture?
- Does this enable cross-training for agents in different parts of the country to handle business continuity scenarios like a hurricane, tornado, or snowstorm that impacts your operations?
- Does it offer you the ability to handle situations where agents can't operate from their primary building due to a power, equipment, or network failure?
- Are their financial incentives? There are many areas of this country that will offer up various financial incentives to open a new office. This can be a significant driver in the site selection.

TECHNOLOGY

Now that you have a solid game plan for your call center, you need to determine the supporting technologies that will play a role. The technology you implement or don't implement will shape the call center's activities, training, processes, morale and productivity.

At the heart of the call center is your core CRM or business applications through which everything else is rooted. As the heart of your call center, the rest of the technology flows around, flows through, or is tightly integrated in with your core CRM or business application.

Supporting Technologies

- Your communication channels should be intertwined with your customer database and ideally the agent doesn't need to learn or operate yet another application on their desktop. Will you leverage technologies that handle queueing and routing of non-voice channels to your agents to give you visibility into these interactions and provide your staff with productivity tools to streamline the effort of handling these interactions?
- Will you embed ACD/telephony into your CRM system for click-to-call or screen pops?
- How will you perform quality management activities? Will they be handled by dedicated staff or part of your expectations for the Supervisors? What percentage of interactions do you intend to monitor? Will these processes leverage call recording? Screen capture?
- Do you have existing workforce management tools, or will you need to explore technology options for forecasting your call volume and developing optimal schedules for your agents? Will this be integrated with your ACD to provide real-time adherence visibility?
- Will you have a knowledgebase for your agents to know the "rules of engagement" and have access to all the key resources needed to help customers? Can this same information be leveraged by customers directly?
- One final point to consider is remote access to your business applications. How can your agents work from outside the office? From a call center perspective, delivery of voice to agents working from anywhere has become ubiquitous, however access to the business applications they need to perform their job is not yet as widely available inside many organizations.

STAFFING

- Project call volume based upon historical data or another top-down forecast.
- Determine staffing needs to meet your Service Level goals.
- Identify agent qualifications
    - Background in your industry
    - Customer Service Skills
    - College degree
    - Technical Skills
    - Prior call center experience
- Determine leadership structure – considerations include:
    - Supervisor to agent ratio
    - Roles & responsibilities of these positions
    - Manager to agent ratio
    - QA Analyst to agent ratio (assuming you have dedicated QA staff)
- Develop a formal Training Plan – considerations include:
    - Classroom training
    - Nurturing / Nest environment to provide high levels of support for the first couple of weeks that agents "hit the floor"
    - On-going training
- Develop a Hiring Plan – considerations include:
    - Qualifications
    - Recruiting sources
    - Compensation & incentives
- Taking calls & Monitoring/Coaching – considerations include:
    - Call/screen recording
    - What percentage of interactions will be monitored?
    - Scoring/calibration to ensure consistency of quality scores
    - Feedback mechanism that is timely and laser-focused
    - Individual and team incentives to exceed your goals
- Determine what techniques you will leverage to empower employee motivation. Remember that employee satisfaction is key to customer satisfaction, absenteeism, turnover, productivity.

OPERATIONS

What reporting sources will you use to manage your call center? How will you measure success? From which system(s) will you derive your key organizational metrics?

- ACD – measure traditional agent and call center metrics plus things like the effectiveness of marketing promotions, calls by product or question type, and agent productivity.
- CRM – productivity such as appointments made, cross-sell/up-sell, product take rates.
- Combine ACD with CRM or business applications – conversion rates (how many calls become a real sales opportunity which becomes a qualified lead which becomes an actual customer), revenue per call, defect rates, and cost per transaction.
- Combine ACD with Workforce Management – agent adherence to schedule (or its sister metric conformance to schedule), forecast accuracy, service level projections.

Agents

- What agent KPIs will you track?
- How will you motivate agents to meet them?
- How do they tie into compensation?
- Are they linked to performance reviews? Raises? Promotions?
- Do agents that meet your KPI goals get first choice of their shifts? Do the KPIs open doors to other perks like the ability to work from home?
- How will you gauge agent call performance? A critical function in every call center is assessing call quality. Developing a quality monitoring program is the key to improving agent performance. Timely and focused feedback will dramatically increase your call center's performance so that you can move the middle 80% of the pack towards operating like your top performers.

Customer

- What is your customer escalation process?
- How will you track the escalations?

Organizations needs a "relief valve" for customers who have reached the boiling point. How will you handle those customers? You need a defined process to get those customers the relief they seek. This is oftentimes a great place to capture feedback to drive change back into the organization. Perhaps the website needs a tweak, or some additional language would improve product documentation or new topics are identified to incorporate into new hire training – these customers can provide some valuable insights.

- How will you measure customer satisfaction?
- What process will you follow for constructive feedback?

It all boils down to this critical metric – customer satisfaction. This is arguably the most important gauge that should be front and center in the cockpit of your call center. This provides visibility into your course, altitude, fuel levels, oxygen, and so on, and is a gauge that helps you understand where you have been and whether you are on the right path or not.