Reaching The New World: A Map For Work Management

BY ROBIN FOSTER, ZACK TAYLOR, AND LUCY SANDERS

Every year auto clubs and online travel sites provide their members and users with maps and detailed routes to help ensure that happy travelers enjoy the best possible trip. We have so much information about our planned routes that it’s unimaginable that at one time explorers ventured into uncharted waters with a warning “They’ll be dragons here” and unfamiliar land characterized as “The New World.” But one thing hasn’t changed since the days of Magellan: A map does not take the trip for us — it can only guide us along the way.

Just because you have a destination in mind, you won’t necessarily arrive there or even take the trip, let alone enjoy it. A map also does not account for unexpected situations like storms, road construction, or detours that could impact the journey.

Today’s customer contact centers work within the same paradigm. If you have a “map” that describes how to respond to a customer, it provide a service that delights the customer. For example, it is often believed that initial segmentation during call arrival by asking, “Is this caller a new customer, or is this caller a repeat customer?” produces call routing that is sufficient to provide excellent service. This is not always so; to provide truly exceptional service, it is critical that we separate the customer request into specific steps that include not only the initial real-time contact, but all associated work activities in the post-contact phases of servicing the request.

We must move to a contact model that deploys intelligence at each step, in both the initial (real-time) and downstream (subsequent) phases of serving the customer. By using software that brings intelligent business rules to both phases, we help ensure the appropriate alignment of enterprise resources around customers.

A ROUTING FOCUS

There are many technologies in the contact center that express intent for how customers are to be served. Most of these technologies utilize what we call “routing.” Each in its own way shapes or influences the actual execution of the requested service, but none of them really control whether the caller’s request is successfully executed.

In a contact center, the caller’s destination can be selected with or without the caller’s direct participation (via IVR or CTI technologies), with or without
regard to customer profile data, and with or without taking into account agent skills or availability. Whether a customer was prompted for information, opted out of an IVR, or was recognized as a high value client in the marketing database, each customer is given a destination with the apparent belief that the customer’s request will be ultimately satisfied.

THE JOURNEY BEGINS
What happens after the destination is selected? The trip starts! Now the goal is to guide the caller to the selected destination in reasonable time, before the caller abandons the call. Sometimes the contact center has the right type of agent available and waiting for the next interaction. Getting the customer to this destination is now simply a matter of connecting the contact to the agent. Or is it?

What if the contact cannot arrive at the destination immediately? The customer must wait. Others are ahead of this customer, also waiting to arrive at the same destination. In traditional contact centers, additional routing techniques are generally used that occupy the caller’s time, and attempt to push the contact forward in the queue, so that the customer is answered within a “wait time” that makes the center’s operational metrics look good and prevents caller abandonment.

Yet even in the traditional contact center, these techniques are seldom enough to guarantee efficiency and good customer service. Pushing calls forward and using schemes like preemptive queue priorities may help an individual customer move ahead, but at the expense of other travelers using the same road simultaneously. If we all drive in the left lane, what have we accomplished? What if agents are over-serving some customer requests and under-serving others? What if center efficiency could be improved, and service levels be met if agents left some calls in queue and took other calls that had arrived later?

Assuming all of these issues could be resolved (which they can, using some of the new, predictive routing strategies on the market today), would we be able to guarantee that the customer’s request had been successfully fulfilled? Have we indeed given them the map for a satisfying journey that ends with a smile? No! The journey ends, almost before it has started, with the agent answering the call.

INTELLIGENT WORK MANAGEMENT
Think about ordering an item from a catalog. While you are happy when an agent promptly answers your call and takes your order, you will not be satisfied until the item arrives at your door step, on time, and in good condition.

Today’s contact centers do not yet incorporate the work management techniques to clearly map out and accomplish this type of journey; they engage contacts on the basis of arrival, using routing techniques that map only the initial contact. Certainly, a portion of contacts are “one and done,” but many more are not. If we focus only on this type of simplistic routing, and not on the request fulfillment (which implies a satisfied customer), we risk
unbundling a holistic customer experience into a series of sub-optimized events.

The delivery of true customer satisfaction (which is at the heart of CRM) requires a focus on the entire customer experience. We need to look at all elements of a customer contact from arrival to satisfaction, which requires a much wider view than that provided by today’s contact center routing algorithms.

CONCLUSION
In evolving from routing and into managing work, the contact center must:

1. Define the “on time” performance metric for each contact or waiting work item, for all types of work related to customer requests (voice calls, e-mail, request approval, order placement, etc.), and not just phone calls. Service objectives (which neither over-serve nor under-serve customers) must be set for all work items.
2. Use predictive knowledge, based on the dynamics of the center, when determining what each agent should do next, whether it is handling a fax, surfing the Web with a customer, or placing an outbound call. Look as far downstream (into the future and into post-call fulfillment work) as possible to evaluate the consequences of every choice.
3. Empower agents to handle multiple work items based on their skills, hence enhancing the entire customer experience (from initial contact to request fulfillment).

Intelligent work management software must extend from the front office to the back office, from the initial point of contact with the customer — whether it’s through the phone, through e-mail, or any other media — to complete fulfillment. A set of governing rules that spans both the real-time and non-real-time elements of customer contact will enable the enterprise as a whole to meet — and perhaps exceed — the expectations of each individual customer. Only then can we deliver the type of holistic service appropriate in an era where the competition is just a “mouse-click” away.

Robin Foster is manager of research, Lucent Technologies Call Center Advocacy; Zack Taylor is director, Lucent Technologies CRM Solutions; and Lucy Sanders is vice president, Lucent Technologies Bell Laboratories. For more information, visit www.lucent.com

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