Preliminary (City) Findings

The raw findings, analysis and results of our exploratory investigation of the (City) call center

Voice of the (City) Call Center

Conversations with and observations of center reps and coaches

Deb

- Too much to do before I can give the customer what they're asking for
- So much time managing the tools, and not enough with the customer
- Reminders in context could be helpful
- Long wait to finish handing-off issues
- We can make the customers pretty happy
- 10% of calls are for data products—and create our biggest frustrations
- We are still the front face, yet often have little control over data products order process
- Separate need-to-know messages from the rest
- I spend about 1 hour a day—distributed throughout the day—sifting through messages
- The laminated sales hand-outs are helpful—the information hand-outs are less so
- Done a good job putting everything into Notes
- All the info in the surrounding just blends into the background and becomes invisible
- Sharing data across systems would be helpful
- Reducing redundant data entry within systems would be very helpful

Matt

- Web-based systems slow me down—their response times can be very bad, and we cannot keep web sessions open longer than absolutely necessary
- Problems with web-based tools:
  - Slow response times
  - Lost data—usually when I have to hit the back button, or refresh
  - Frequent browser and system lock-ups
- Uses of web-based tools:
  - CPE
  - DSL
  - Wireless
  - Payments
- When you make a mistake in the web-based tools, and have to go back to fix it, you lose all you data and virtually have to start again
- While inputting an order, we get lots of error messages that needlessly hinder my flow. It would be better to leave all the errors till the end—most reps know what inputs will cause what errors while they are entering the data—the don't need to stop their flow to fix them immediately.
- Half my attention is with the customer, while the other half is focused on the tools
- Navigating the tools and information is very time consuming
- Every sales call requires a rate quote—and most require a comparison between different rate quotes
- Each quote requires me to build an order—this means lots of retyping the same data over and over again
- Retyping redundant and useless data costs me about 1 hour a day
- Billing issues for other carriers is the primary waste of time
- Jobaid contains lots of stale information—but no way to tell upfront—dating information might help, but no one will really even look
- Important messages no longer even go through Notes, they go right to the Office Features database and we must query it for new messages
- We still get tons of messages—but now we just don't the important ones
- To many people think that they need to prove they work by sending pointless messages—no one reads them
- We get hit a lot for having provided wrong information—billing is usually the primary source of misinformation
- If we could see other departments' billing information, or let them comment ours it would be helpful

Tony

- Call Manager is good
- Data sharing between apps would be very good
- We input lots of redundant data when dealing with affiliates
- DSL order process is a black-box, we'd like to know more about status
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- Jobaid is not friendly
- I use Jobaid only when I'm on the phone
- • DOE = quotes, orders
  • BMEX = check DSL
  • SOP = Check status
  • Notes = Over to of SOP
- I always organize my windows the same way
- I get 30+ messages a day
- Customers are generally thrilled with follow-up notifications
- Realtime stats = nice
- Confusions surrounding billing adjustments
- No issues with wrong or stale data in Jobaid
- On upsell, 30% bite, 30%, think and 30% decline
- The web tools are nice
- No performance differences between web-based and 3270 tools

Coaches

- Might be good to be able to visualize workflow and rep's position in it
- Why can't we send online customers product pics and information over email?
- Some reps just aren't as technically savvy as they could be
- After training we will hand-hold the reps till they are comfortable with the tools and tasks
- The reps don't need word-for-word scripting (regulatory issues notwithstanding) but contextual info and reminders might be very useful
- Give reps a comparison tool
- Performance management tools suck
- Identifying particular promotions can be difficult for the reps
- Now having to make sales has caused some interpersonal frictions between some reps
- Lots of confused calls from the elderly

Customer Pains

- Centers' hours of operation
- Payment options
- "I can't believe it will take 5 days to get service"
- "Why don't you call me when my bill is suddenly outrageous"
- "I can't believe it takes 3 weeks to get DSL"
- Some customers require better multi-lingual support

Side-by-Side Observations

- High degree of multi-tasking
- 6-7pm and Saturdays spent dealing with customer concerns that need to be handled by centers that are closed
- We aren't really notified about anything
- Activities less like data entry, and more life network configuration
- Could computer handle phone communication between reps, then hand-off job state as well?
- Reps are very fast with the tools and knowledgeable about navigating tasks with them—some needless nav

Affinity Map

Feedback from the Andover center clusters around 4 topics: tools, information, activities and customer

Tools

Data Entry

- We input lots of redundant data when dealing with affiliates
- Retyping redundant and useless data costs me about 1 hour a day
- Reducing redundant data entry within systems would be very helpful
- While inputting an order, we get lots of error messages that needlessly hinder my flow. It would be better to leave all the errors till the end—most reps know what inputs will cause what errors while they are entering the data—the don't need to stop their flow to fix them immediately
- When you make a mistake in the web tools, and have to go back to fix it, you lose all you data and virtually have to start again
- Performance management t…

Data Sharing

- • DOE = quotes, orders
  • BMEX = check DSL
  • SOP = Check status
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- No performance differences between web-based and 3270 tools
- Cat Manager is good
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- Sharing data across systems would be helpful

Specific Tools

- Uses of web-based tools:
  • CPE
  • DSL
  • Wireless
  • Payments
- I use Jobaid only when I'm on the phone
- …obaid is not friendly
- No issues with wrong or stale data in Jobaid
- Jobaid contains lots of stale information—but no way to tell upfront—dating information might help, but no one will really even look
- The web tools are nice
- Web-based systems slow me down—their response times can be very bad, and we cannot keep web sessions open longer than absolutely necessary
  • Slow response times
  • Lost data—usually when I have to hit the back button, or refresh
  • Frequent browser and system lock-ups

Attention

- Reps are very fast with the tools and knowledgeable about navigating tasks with them—some needless nav
- Navigating the tools and information is very time consuming
- Half my attention is with the customer, while the other half is focused on the tools
- So much time managing the tools, and not enough with the customer

Tool Ideas

- Might be good to be able to visualize workflow and rep's position in it
- The reps don't need word-for-word scripting (regulatory issues notwithstanding) but contextual info and reminders might be very useful
- Reminders in context could be helpful
- …ats = nice
- Give reps a comparison tool
- Could computer handle phone communication between reps, then hand-off job state as well?
- I always organize my windows the same way
- Why can't we send online customers product pics and information over email?

Information

Environment

- All the info in the surrounding just blends into the background and becomes invisible
- The laminated sales hand-outs are helpful—the information hand-outs are less so
- Separate need-to-know messages from the rest

Messaging

- I spend about 1 hour a day—distributed throughout the day—sifting through messages
- Done a good job putting everything into Notes
- I get 30+ messages a day
- We still get tons of messages—but now we just don't the important ones
- Important … longer even go through Notes, they go right to the Office Features database and we must query it for new messages
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Quality

- We get hit a lot for having provided wrong information—billing is usually the primary source of misinformation
- After training we will hand-hold the reps till they are comfortable with the tools and tasks
- Some reps just aren't as technically savvy as they could be

Activities

With Tools

- Each quote requires me to build an order—this means lots of retyping the same data over and over again
- Every sales call requires a rate quote—and most require a comparison between different rate quotes

Knowledge

- If we could see other departments' billing information, or let them comment ours it would be helpful
- We aren't really notified about anything
- Identifying particular promotions can be difficult for the reps
- DSL order process is a black-box, we'd like to know more about status
- Activities less like data entry, and more life network configuration
- High degree of multi-tasking
- Now having to make sales has caused some interpersonal frictions between some reps

Procedures

- Long wait to finish handing-off issues
- 6-7pm and Saturdays spent dealing with customer concerns that need to be handled by centers that are closed
- We are still the front face, yet often have little control over data products order process
- Too much to do before I can give the customer what they're asking for

Customer

Needs

- Some customers require better multi-lingual support
- Confusions surrounding billing adjustments
- Lots of confused calls from the elderly

Voice of Customer

- Centers' hours of operation
- Payment options
- "I can't believe it will take 5 days to get service"
- "Why don't you call me when my bill is suddenly outrageous"
- "I can't believe it takes 3 weeks to get DSL"

Communications

- On upsell, 30% bite, 30%, think and 30% decline
- Customers are generally thrilled with follow-up notifications
- 10% of calls are for data products—and create our biggest frustrations
- Billing issues for other carriers is the primary waste of time
- We can make the customers pretty happy

Abstraction

An abstraction and analysis of the clusters to reveal meaning and and guide a future more in-depth investigation

Things

Tools

- Reps use existing tools very quickly but inefficiently
- Tools force too much redundant and useless data entry
- Reps want to pay more attention to callers, less with tools
- Low cognition, contextual information helps (eg Call Manager)
- All relevant data is available but often an effort to navigate
- 80% of the time spent using 4 tools (Doe, Bmex, Sop, Notes)
- Response times of web based tools can be a problem

Information

- Too much information noise in the environment; reps tune it out
- Most messages in Lotus Notes are merely noise
- Over 10% of reps' time is spent managing lots of messages
- Need-to-know info is client pull, and not management push
- Some reps encounter bad or stale information
- Some rep's will always be closed to new tools and practices
- Often poor notifications to reps

Objective

Subjective

Customer

- Many customers in larger markets need multilingual support
- Customers are impatient with telco bureaucracy
- We don't use online to support customer as well as we could
- Customers do respond to appropriate upsell information
- Many confusions (billing, data products, elderly, mis-vectored)
- Reps' feel that customers are generally quite happy

Activities

- We have a lot to do before give customers what they call for
- Every call requires a quote, every quote require a full order
- Many comparison quotes—compounding redundant data entry
- Many depts. touch a customer, yet no communication between
- Activities less like data entry, more like network configuration
- Some reps would like to see into procedural black-boxes (eg DSL)

People

1. Product planning and development should be bottom-up

Ours is a dangerous top-down approach that will likely result in a product call center reps do not need or want. Rather than trying to realize our grand vision we should let the reps' experiences reveal to us what this grand vision should be. We should:

- Study several populations of call center reps to determine the primary frustrations and causes of inefficiencies
- Develop low-level "dumb" utilities to address the most prevalent frustrations and inefficiencies
- Study the impacts of their deployment and use
- Begin to integrate these utilities and test the impact of providing reps a common environment for only these utilities
- Re-evaluate our grand vision

2. Development must concentrate on simplification and context

Reps have shown that they are comfortable, skilled and have a great facility with current tools. Their primary complaints revolve around data entry problems like frequently entering and re-entering redundant data, loosing data, and some systems' response times. They do not, generally speaking, demonstrate or claim to need more powerful or more intelligent tools. They do however claim to want us to help make it easier for them to give customers what they want faster.

Making it easier does not *necessarily* mean unifying all tools into a single common environment. In and of themselves, single function tools are always easier to use than multi-function tools. In the same way 10 different icons on the desktop may be easier to use than a single icon with 10 different functions. Clearly there is a threshold beyond which unification is functional. However it is far from clear that reps are anywhere near such a threshold. Observations show reps using 4 - 6 tools concurrently.

3. Improve internal communication tools

Reps say current communication tools and methods are highly ineffectual and waste large amounts of time and attention. Information posted in the environment gets tuned out; handouts get lost; Lotus Notes is clogged with noise; and Office Features is a client-pull tool.

The grand unified theory of XXXXXX may not be the right approach—we need to let the reps show us in what direction we will find the right approach.

- **Dummy Order Tool** Allows reps to enter all the data given by customer once within the natural flow of the conversation, and then direct that data to the appropriate systems. This eliminates redundant data entry and re-entry, and prevents data from getting lost

- **Workflow Visualization Tool** Shows reps the entire flow and their current location in it; will also support random access to and from every step in the flow

- **Quote Comparison Tool** Dynamically builds product price and feature comparison tables so that reps no longer have to build each individual product configuration as a complete real order just to give the customer a price quote.

- **Product Conflict Alert Tool** Alert reps of product conflicts without interrupting their flow, or preventing their ability to provide customers with a quick price quote

- **No Complex GUI** Reps want to keep their hands on the keyboard.

- **Contextual Information** Reps love the Call Manager tool and the DSL pre-qualification which provides them the in-context information to upsell the product. A good model to follow.

- **Computer-Telephone Integration** To help the system anticipate context to help drive contextual information. Furthermore could help an handing customers to other departments or reps (which seems to have a heavy cognitive load) smoother and faster

- **Need-To-Know Alerts** A management-push alert to all center reps

- Web-based tool to share information with customers over the web or through email in real-time