Best practices

7 Habits of Highly Effective Contact Centers and Help Desks

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Stephen R. Covey's bestseller, *The 7 Habits of Highly Effective People®: Powerful Lessons in Personal Change*, has inspired many parallels in the field of business and organizational improvement. Contact centers and help desks, too, could become significantly better at what they do by adopting the timeless, principle-based habits recommended by the book. We dedicate this white paper to Mr. Covey and his phenomenal teachings.

In this paper, we discuss seven traits of successful contact centers and help desks, backed by stories and tips from our customers—some of the world's most innovative customer service and support organizations. Based on well-understood principles of long-term effectiveness, these habits are simple, organic, cohesive, and very powerful. The seven habits that could set your contact center or help desk on the path to success and growth are:

- Habit 1: Be proactive—embrace change, harness the power of new technologies
- Habit 2: Begin with the end in mind—start with mission statements, goals, road maps, and metrics
- Habit 3: Put first things first—let priorities drive initiatives
- Habit 4: Think win/win—what's good for your customer is good for you, too
- Habit 6: Synergize—bring it all together with a customer interaction hub
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- Habit 7: Sharpen your saw (the right one, that is)

Habit 1: Be proactive—embrace change, harness the power of new technologies

Like individuals, contact centers and help desks respond to inevitable change in two ways: either they embrace change and profit from it, or they deny its need until they are forced to accept it to survive.

Being proactive means keeping pace with changing times by being in control of your operational assets, team capabilities, and business objectives. It means understanding the importance of constant improvement within one's sphere of influence, and then taking concrete steps in light of this self-awareness. These principles apply to contact centers and help desks as much as to entire businesses.

The last decade has been one of constant technological advances. Some service organizations have embraced new technologies and growing customer expectations to create competitive advantage. The web is here to stay, and contact centers and help desks that have proactively adopted new web-based ways of interacting with customers have earned greater customer satisfaction at reduced costs. A large financial services organization we work with has made a concerted push towards web-enabled multichannel interactions in its customer service and support efforts over the last five years. As all investments are monitored and measured in this organization, it has concrete proof of the returns on its investment in multichannel service. The self-service usage rate grew from 70% (IVR mostly) to 85% (IVR, plus automated email response and web self-service) even as their customer satisfaction scores went up. For the business that translated into a 3% improvement in operating margins!

TAKEAWAYS

- **Instead of just reacting to what is urgent and requires fire fighting, set aside a couple of hours each week to evaluate the overall operations of your business.**
- **Be aware of new customer demands and business trends. Evaluate them and, if they seem important, fit them into your road map (see Habit 2: Begin with the end in mind—start with mission statements, goals, road maps, and metrics on page 4). Keep in mind that industry "best practices" do not necessarily translate into "best practices" for your own operation. So think for yourself—you know more about your own operation than most consultants and thought leaders.**

Habit 2: Begin with the end in mind—start with mission statements, goals, road maps, and metrics

Time and again, we have seen service and support organizations jump into technology evaluation and selection even before they have decided on the business goals of an initiative or the metrics to identify success. What applies to individuals applies equally to organizations. If you don't know what you want out of an endeavor, your chances of success are remote!

One of our clients maintains a live document that outlines a five-year road map for contact center transformation, with detailed quarterly milestones that lead to the final goal. This document is updated and shared with the entire transformation task force and trusted vendors regularly. There are only three primary objectives of this strategic initiative, each clearly defined and independently measurable.

1. Increased repeat purchase from existing customers
2. Reduced customer attrition
3. Reduced service cost per customer

The detailed metrics from sub-projects and tasks feed into these simple, very measurable metrics for the entire initiative. This check and balance strengthens the return on investment (ROI) measurement process, keeping it transparent and independent.

On the other hand, we have seen many contact centers and help desks investing in new technologies for eService with the goal of "providing better customer service"—a noble goal, but not an easily measurable one. Moreover, there is a key missing link between delivering better customer service and the business benefiting from it. These tactical projects may all succeed, but not contribute towards an aligned set of end goals. When you have the end in mind, you create a map with signposts and driving directions. This approach may not improve the chances of success of a project, but it ensures that when your project does succeed (thanks to a lot of hard work from you and your team) the results are in line with the overall strategic objectives of the company.

TAKEAWAYS

- **What is your organization's mission? Do your team goals match the company's business goals for the next 12 to 24 months? A clear mission statement backed by well-defined goals is the hallmark of effective contact centers and help desks and is the key to ensuring a consistent customer experience.**
- **Next, build a road map. Create a long-term plan before investing in any new tool or initiative. Make every dollar count. A road map ensures that every purchase fits into the larger picture. Smart help desks begin with a detailed**

blueprint of a customer interaction hub (see Habit 6: Synergize—bring it all together with a customer interaction hub on page 8), and then add channels and tools one by one, according to plan.

Habit 3: Put first things first—let priorities drive initiatives

Often, executives will veer towards approaches that they have successfully tried before, a classic success trap. Most contact center and helpdesk executives have come from either the technology side or the operations side. They are sometimes either too analytical or too technical in their approach to performance improvement.

To deliver excellent service and support, you must first qualitatively define "excellent service" from the perspective of your customers. Then let that definition drive your priorities.

Some key initiatives that we see in enterprising contact centers and help desks these days are:

- **Using the web to expand access to service:** Customers want multichannel 24x7 service. This change may not require a lot of technology but it means significant behavioral change in the contact center or help desk as well as different information flows or knowledge base design to enable consistent multichannel service.
- **Providing a common knowledge base for help desk agents and web self-service:** Again, this initiative involves a smarter use of resources rather than investment in lots of new technology.
- **Setting up interactive process support tools:** Avoiding classic training for your agents and instead investing in knowledge-powered interaction tools may be a better investment for your contact center or help desk.

Every service organization must develop a business strategy with clear goals before acquiring and implementing new technologies. Executives should ensure that their team understands the need for a change in strategy to improve operating performance and how this change will be effected and measured. If you have put first things first, technology acquisition and implementation should be the final few steps in your journey to improve performance.

TAKEAWAYS

- **Establish key objectives for your contact center or help desk.**
- **Choose metrics that balance each other. No single metric can completely capture the intent of the business. For example, remember to measure customer satisfaction as you monitor self-service usage.**
- **While buying and implementing technology during a performance optimization initiative, the more time you spend understanding user needs, architecting the framework, and defining interfaces, the better your chances of success.**

Habit 4: Think win/win—what's good for your customer is good for you, too

Contact centers and help desks often see themselves as under constant assault from customers demanding service! It is easy to fall into this mode if one focuses too much on efficiency goals. Self-service can be seen as another "clever" way to tire out the customers so they eventually give up and go away. Clearly, this attitude is not healthy. Yet, many service organizations seem to operate on similar principles of efficiency that ultimately drive away customers.

The way to change this attitude is to recognize common grounds between the interest of the customers and the interest of the contact center or help desk. For instance, you can see self-service as a way to save cost for the company. But self-service is also a very effective channel for the customer to get the help they need as long as the service is convenient and accurate!

By finding common ground and redefining the objectives and metrics of a contact center or help desk, executives can begin to trace the impact of their organization's performance on overall company performance. In this regard, contact centers and help desks tend to trip on false metrics by blindly following industry "best practices." For instance, average call handle time has historically been seen as a good metric for efficiency. However, research has shown that by pushing agents to reduce average handle time, organizations get highly unsatisfied customers because the agents will slam the phone as soon as possible to get their average handle time levels down!

Instead of thinking of a customer call as an expense, also look at a customer call as a unique opportunity to delight a customer, and a great opportunity to advise the customer about solutions and upsell. Research shows that a customer who has a problem with a product, contacted the business, and had their problem solved well is likely to be far more loyal to the business than someone who has had no problems with the product ever. Talk about a win/win!

TAKEAWAYS

- **Win/win strategies for your contact center or help desk are best developed by focusing on the customer. Learn to use the inherent force and power of customer-centric plans.**
- **Reinforce customer-centricity with customer-centric metrics.**
- **Make sure you are talking to your customers. Surveys and feedback tools should be part of every initiative.**

Habit 5: Seek first to understand, then to be understood—know your customer

Consider a typical contact center or helpdesk operation. There is a constant pressure to cope with ever-increasing volume of customer contacts. In this environment, instead of listening carefully to what our customers are telling us, we can get caught up in our own charts and graphs and analysis. We can spend a lot of time convincing ourselves that we are doing a great job.

Groupthink is a constant risk when there is constant pressure to wring productivity and efficiency out of large service organizations. Inside-out improvement efforts that focus on efficiency without empathizing with the customer experience create "IVR black hole" like experience for their customers. The business of convincing our customers that we are helping them well can easily be turned on its head by asking customers how they think we are doing.

It's also important to make sure that you share customer information across the organization. Fractured views of the customer not only cause customer dissatisfaction, but are also a huge drain on your resources.

TAKEAWAYS

- **Listening to customers helps you understand how to help them better. It also improves your relationship with your customers. It shows that you care about their opinion. Like everyone else, customers want to be heard.**
- **Consolidate customer information so that you can recognize the customer at every interaction point.**

Habit 6: Synergize—bring it all together with a customer interaction hub

Synergy is a hard word to define but an easy word to experience. When all your contact center or helpdesk assets and capabilities are working towards delivering a unified and consistent customer experience, you experience synergy.

Synergy does not happen on its own. But, effective service organizations live and die by a common set of business metrics that everyone in the team is intimately familiar with. Going back to the previous habit, one can observe synergy or the lack thereof in a contact center or help desk by listening to customer feedback. One of the common complaints from customers about their customer service experience is that they don't like being the glue across multichannel interactions. Lack of integration and consistency across multiple channels of interaction is a key indicator of lack of synergy. When service organizations architect and implement customer interaction hubs that deliver consistent and accurate responses across all interaction channels, they create synergy—synergy with customer interests (think of Habit 4: win/win) and synergy across their own operations.

The help desk run by one of North America's largest telecom companies is a good example of a synergized operation. This multichannel help desk effectively measures and tracks the impact of their service interactions on two metrics: avoided returned handsets and customer satisfaction. Every employee in the help desk can tell you exactly how they are performing, how their team is performing, and how each service channel—email, web, or phone—is performing on these two metrics on any given day of the week. Furthermore, they can tell you what their targets are for the next three months and what efforts are underway in the help desk to get to those goals.

Not surprisingly, they are also aggressive and effective in experimenting with new technologies and service models because they maintain their course through all the excitement and promise of innovation. And they synergize their efforts through common goals and transparent, well-understood metrics.

TAKEAWAYS

- **Clarity of purpose, shared goals, and customer-oriented metrics distinguish world-class contact centers and help desks.**
- **Innovative service models such as customer interaction hubs enable new service delivery mechanisms. Component products and technologies become well-fitting lego blocks within an overall strategic framework.**

Habit 7: Sharpen your saw (the right one, that is)

Contact centers and help desks invest a lot in agent training—an area of significant "misinvestment." You could say that they have been sharpening the wrong saws. Most agent training has been focused on learning (pre-call training). It was a good idea once, but is out of step with the recent self-service transformation that has swept contact centers and help desks. Before phone and web self-service became popular, the 80/20 rule applied well to service interactions: 80% of the calls were about 20% of the issues. So, it made sense to train an agent on the 20% issues. They would solve 80% of the issues and escalate the rest.

Self-service targets the same 80% now. As a result, the issues that get to agents are more complicated and definitely not the kind that can be learnt easily in a few weeks of novice agent training. At the same time, product cycles have shortened, new product variations are exploding, and agents are burning out. Now contact centers and help desks have to cram more into these novice agents—meanwhile, self-service continues to take away the easy end of service issues.

There is a need to shift the training paradigm from "pre-call" to "in-call." Instead of forcing the agents to learn the processes, new interactive process support software can help capture and codify service best practices that can be interactively used by novice agents. This approach has helped large wireless service providers and financial services companies reduce training time for agents from two months to one week, even while their first-time resolution rates have improved by 15%!

TAKEAWAYS

- **Invest training resources wisely. There are many successful examples of contact centers and help desks migrating from "pre-call" training to "in-call" interactive process support tools that result in a better customer experience, a more empowered agent, and a more profitable interaction for the contact center or help desk.**

A final word

What works for individuals works equally well for contact centers and help desks. By reusing proven, timeless principles of self-improvement and applying them to service operations, businesses can achieve new levels of performance without compromising on customer experience.

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